



# Installing and Configuring Oracle Knowledge

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*Installing and Configuring Intelligent Search, Information Manager, Analytics, AnswerFlow,  
and Integration Applications*

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# About This Guide

This guide is intended for technical staff who are responsible for installing Oracle Knowledge. It provides detailed information on installing Oracle Knowledge product components and post-installation.

The preface contains the following information:

- **In This Guide**
- **Examples of Product Screens and Text**
- **Operating System Variations in Examples and Procedures**
- **References to Web Content**

## In This Guide

This book, *Installing and Configuring Oracle Knowledge*, is divided into the following chapters:

| Chapter                                                                         | Description                                                                                                              |
|---------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Chapter 1, Oracle Knowledge Overview</a>                            | Describes the general installation process, and lists hardware and software requirements.                                |
| <a href="#">Chapter 2, Planning to Install Oracle Knowledge</a>                 | Describes the requirements that must be met before installing Oracle Knowledge products.                                 |
| <a href="#">Chapter 3, Preparing to Install Oracle Knowledge Using WebLogic</a> | Describes preparation measures, such as WebLogic server installation, that must be done prior to installation.           |
| <a href="#">Chapter 4, Installing Oracle Knowledge Intelligent Search</a>       | Describes using the automated installer to install and configure Oracle Knowledge Intelligent Search components.         |
| <a href="#">Chapter 5, Installing Oracle Knowledge Information Manager</a>      | Describes using the automated installer to install and configure Oracle Knowledge Information Manager components.        |
| <a href="#">Chapter 6, Installing Oracle Knowledge Analytics</a>                | Describes using the automated installer to install and configure Oracle Knowledge Analytics components.                  |
| <a href="#">Chapter 7, Installing AnswerFlow</a>                                | Describes using the automated installer to install and configure Oracle Knowledge AnswerFlow components.                 |
| <a href="#">Chapter 8, Installing RightNow Integration Components</a>           | Describes using the automated installer to install and configure Oracle RightNow integration components.                 |
| <a href="#">Chapter 9, Troubleshooting Oracle Knowledge Installations</a>       | Describes how to resolve some common issue that might arise when installing and configuring Oracle Knowledge components. |

## Examples of Product Screens and Text

The product screens, screen text, and file contents depicted in the documentation are examples. We attempt to convey the product's appearance and functionality as accurately as possible; however, the actual product contents and displays may differ from the published examples.

## Operating System Variations in Examples and Procedures

We generally use Linux screen displays and naming conventions in our examples and procedures. We include other operating system-specific procedures or steps as noted in section headings, or within topics, as appropriate.

We present command syntax, program output, and screen displays:

- in Linux format first
- in other Unix-specific variants only when necessary for proper operation or to clarify functional differences
- in Windows format only when necessary for clarity

## References to Web Content

For your convenience, this guide refers to Uniform Resource Locators (URLs) for resources published on the World Wide Web, when appropriate. We attempt to provide accurate information; however, these resources are controlled by their respective owners and are therefore subject to change at any time.

# Oracle Knowledge Overview

This chapter provides an overview of the Oracle Knowledge components for which this guide provides installation and configuration instructions. These components are:

|                            |                                                                                                                           |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Intelligent Search</b>  | Provides components for Language Workbench and the associated web interface for defining and performing content searches. |
| <b>Information Manager</b> | Provides components for content creation and management as well as iConnect web applications and InfoCenter integration.  |
| <b>Analytics</b>           | Provides components for performing standard and customized performance metrics.                                           |
| <b>AnswerFlow</b>          | Provides components for building automated solutions in response to customer queries.                                     |
| <b>RightNow</b>            | Provides integration components necessary to integrate RightNow components.                                               |

## Installation Process Overview

Perform post installation configuration and validation steps. The installers help you get all of the Oracle Knowledge components installed correctly. Depending on your configuration needs for a particular environment there must be some post installation configuration work in order for the environment to work together properly. This typically involves setting up load balancers, firewalls, and external web servers to server static content. Integrating into existing security mechanisms is out of the scope of this manual.

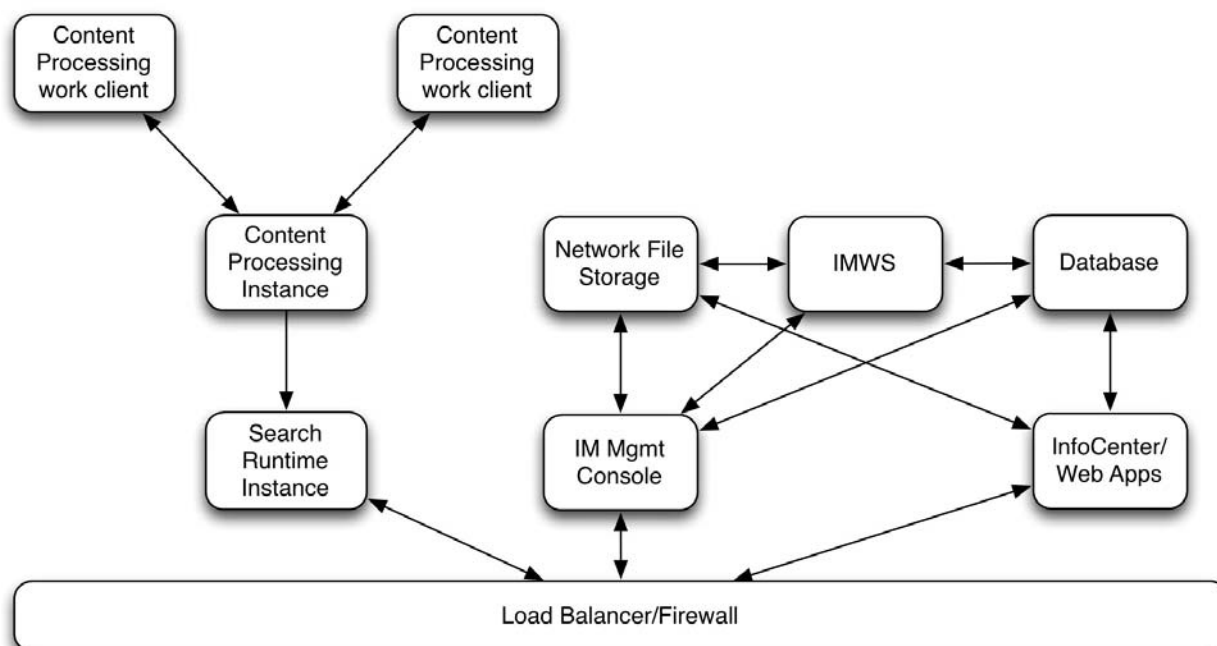
## Oracle Knowledge Product Distribution

Oracle Knowledge software components and installers are distributed as licensed platform-specific media packages. These packages are distributed on Oracle Software Delivery Cloud or on CD-ROMs. For information about which media package is appropriate for your license, see the *Oracle Knowledge 8.6 Release Notes*.

## Oracle Knowledge Features

Oracle Knowledge is a suite of components that provide enterprise class Knowledge Management functionality that can scale to the needs of the most demanding customer.





**Oracle Knowledge components**

**Intelligent Search** provides natural language analysis of user's questions in more than 20 languages. Intelligent Search includes a scalable enterprise search engine that can index web sites, file systems, databases, discussion forums, and other stores of knowledge including social media. Intelligent Search can be scaled as needed for load simply by adding additional instances to the network.

**Information Manager (IM)** is used to create new knowledge for use within the enterprise Knowledge Base. IM provides the ability to define customized templates to capture knowledge and configurable workflows to manage the review and publication of the knowledge. A role based security system provides coverage from knowledge creation thru distribution and consumption.

The Oracle Knowledge web applications include:

- **InfoCenter** - a reference web self service UI that can be customized by customers for their own needs. InfoCenter embodies some good KCS best practices that can be adapted for an organizations needs.
- **iConnect** - iConnect provides reference integrations to external systems such as Oracle Service Cloud, Siebel, and other CRM vendors products.

Oracle Knowledge Analytics is a business intelligence application that provides insight into the effectiveness and performance of Oracle Knowledge Intelligent Search and Information Manager implementations. The Analytics application provides intuitive dashboards and packaged reports that provide insight into the most important aspects of search and content performance and user interaction. Analytics features near-realtime data integration, easy end-user access to application data for creating custom reports, and a comprehensive set of reporting tools packaged within Oracle's Business Intelligence presentation environment.

The Oracle Knowledge documentation set is available at:

<http://www.oracle.com/technetwork/indexes/documentation/knowledge-documentation-1506742.html>

## Oracle Knowledge Environments

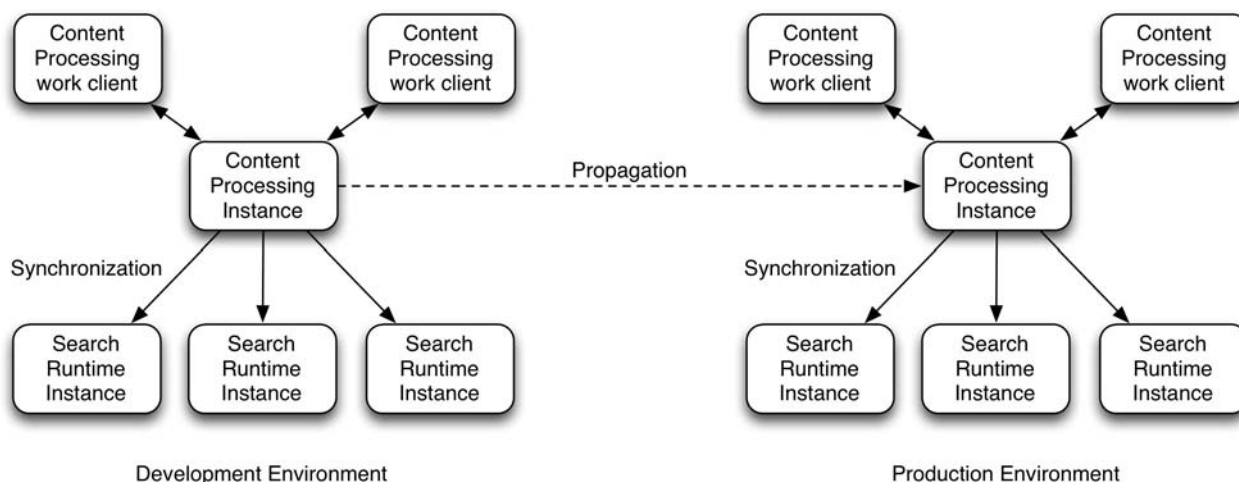
Oracle Knowledge architecture supports the following environments in which you configure and deploy defined instances, as described in each of the product chapters in this guide, to support and control the creation and distribution of application data.

| Environment        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Development</b> | Development environments can contain multiple Tools, Scheduler (default), Work Client, and Runtime instances used for developing and testing application components and data. The default settings in the Common Environment application configuration program configures a Development (also referred to as Standalone) environment.                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Staging</b>     | Staging environments are intended as separate testing environments. They support all operations. Staging environments can contain multiple Scheduler (default), Work Client, and Runtime instances used for validating application components and data prior to synchronization with production instances. The only way to get information into the staging environment is via propagation.                                                                                                                                                                                                                                                                                                                                           |
| <b>Production</b>  | <p>Production environments are intended to support scheduled operations and hands-off administration; they support only scheduled indexing operations and request processing operations.</p> <p>Move data into production environments using the propagation process. The production environment can contain:</p> <ul style="list-style-type: none"> <li>• One or more Runtime instances configured to receive application data from configured Scheduler instances and to communicate with the production application server</li> <li>• One or more Controller instances for use by the data synchronization process</li> <li>• One or more Query Worker instances for use in distributed request processing environments</li> </ul> |

For additional information on product-specific environments, review the sections below and see “Installation Process Overview” on page 19.

## Intelligent Search Instance Environments

Intelligent Search is composed of a content processing instance and one or more search runtime (request processing) instances that are used to process search requests. The following graphic illustrates the relationships between components and the Development and Production environments:



**Oracle Knowledge Intelligent Search Components**

Content processing can be distributed across multiple machines using work clients to improve indexing performance. Typically there is a single content processing instance in per environment (development, staging, or production) and one or more work clients available to perform indexing operations. The content processing instance also hosts the Search System Manager web application that is used to configure the Search collections and schedule indexing on the collections.

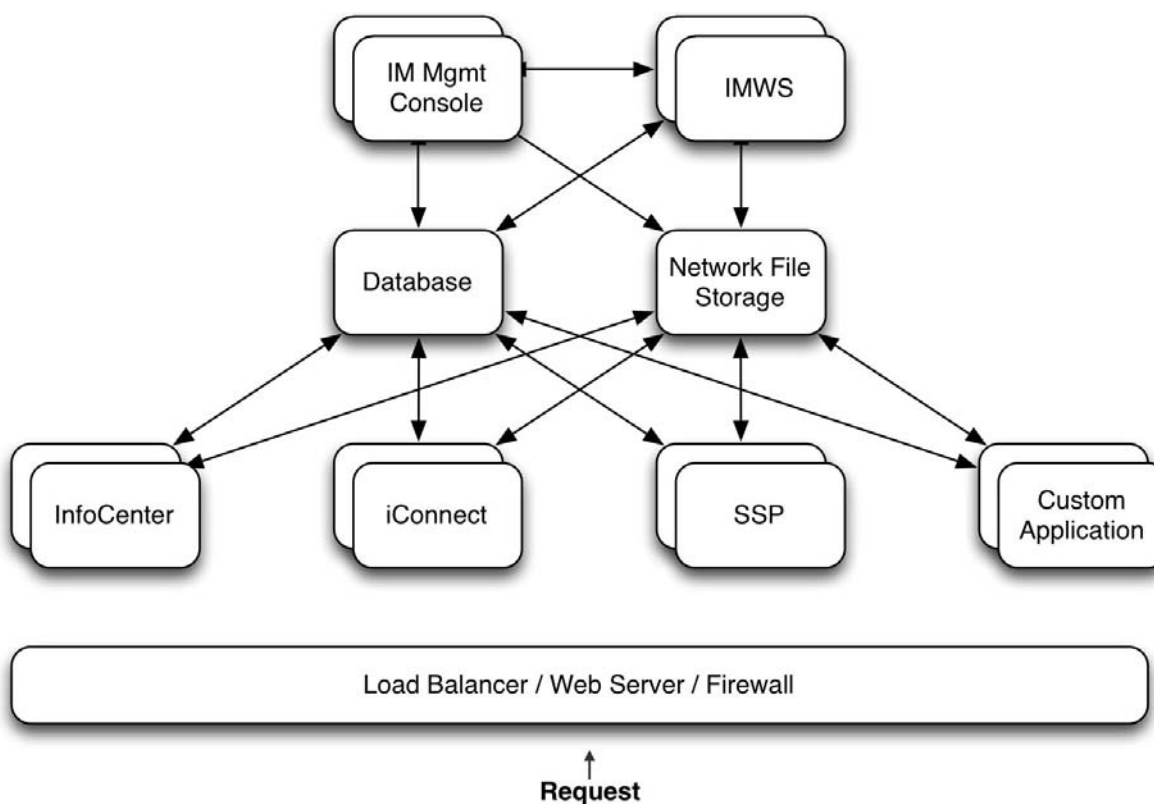
Each environment also has one or more search runtimes available. These runtimes are typically load balanced to allow greater scalability and fault tolerance in the environment. Depending on the size of the overall index it may be necessary to set up a distributed runtime environment in order to more efficiently handle the search requests. Configuring the distributed runtime is outside of the scope of this installation guide. More information can be found on the Oracle Knowledge support site.

Intelligent Search typically uses two or three different environments. The development environment is used for developing business rule conditions and experimenting with search tuning. The staging environment is typically used to perform final testing before pushing the changes to the production environment. The production environment is used for answering customer requirements.

The Search software must be installed in each environment separately. After the software is installed, the Dictionary and configuration changes can be propagated between environments using the Content processing instance and tasks configured in the Search System Manager.

## Information Manager Instance Environments

An Information Manager application uses the following components, which are installed and configured in the standard installation process. You can configure Information Manager components on a single server or distribute them throughout a network. The following diagram illustrates the relationships between the logical application components:



Oracle Knowledge Information Manager components

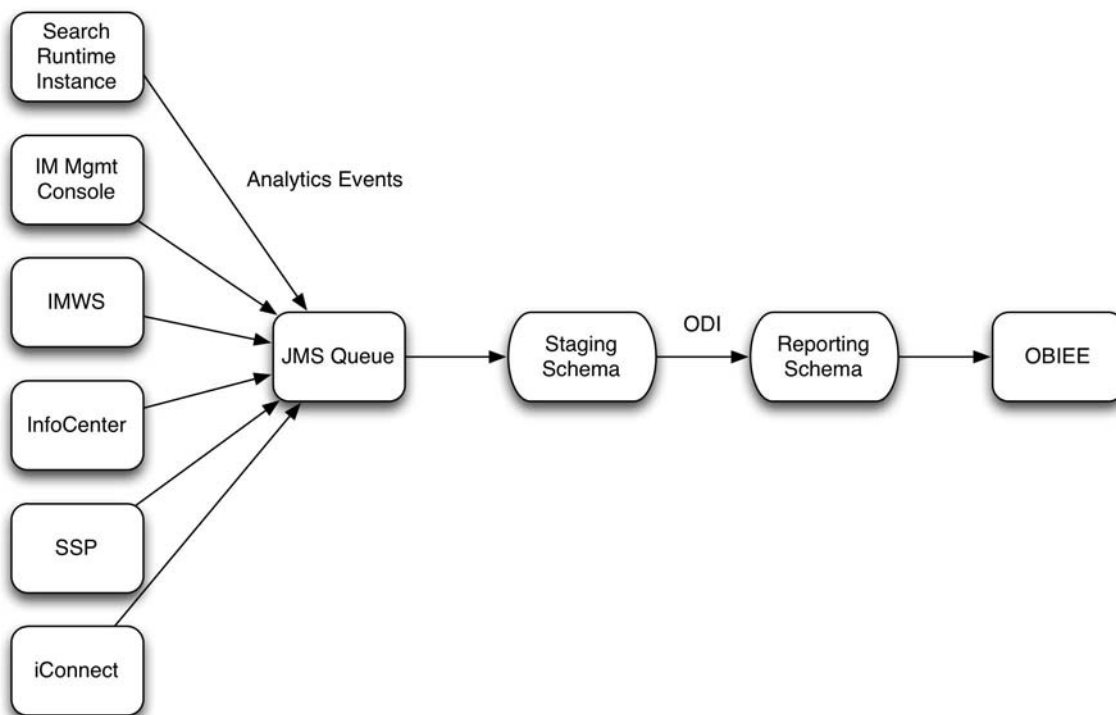
| Component                                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Information Manager Tag Library Web Applications | Information Manager uses a J2EE servlet container supporting JSP version 1.2 and higher compatible tag libraries to distribute Information Manager application content.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Web Server                                       | An external Web server is used as the primary interface to the Information Manager based Web applications.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Information Manager Content Resource Store       | The Information Manager Content Resource Store stores resources (files) that are attached to content records in the application. The content resource store is a directory on a file system that is accessible to the Management Console and the application Web server. It can be located on the same server as the Management Console, or on a network file system. You can configure Information Manager to maintain separate staging and production resource stores. Resources can be served by separate Web servers or configured to use resource caching services (such as Akamai). The content resource store stores XML versions of content records used for search indexing, and tracks all versions of content records and attached resources. |
| Management Console                               | <p>The Management Console is a Web-based user interface to all content creation and management functions. The Management Console can be replicated on multiple servers.</p> <p>There are two different configurations that a management console can run in. When running in "batch" mode, the IM Console should be used to process batch operations and content crawling requests. When running in "authoring and admin" mode, the instance can be used to configure the IM repository and author knowledge articles.</p>                                                                                                                                                                                                                                |
| Database Server                                  | The Information Manager database stores the Information Manager content management objects. The installation process automatically creates the required tables in a specified database.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Information Manager Web Services                 | Information Manager provides an open set of Web services and a native platform API (Java and Microsoft .Net platforms) to support adding and modifying content, content categories, and user information from external applications.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

## Analytics Instance Environments

You can use Oracle Knowledge Analytics to:

- Understand user behavior, such as why users visit your site, and what they try to achieve
- Assess the quality of Oracle Knowledge responses and determine whether users are finding the information they need
- Determine if important information is missing from your application content

The following diagram illustrates the Oracle Knowledge Analytics process flow:



**Oracle Knowledge Analytics components**

## AnswerFlow Instance Environments

Oracle Knowledge AnswerFlow is a guided knowledge delivery application that enables you to provide precise and dynamic automated answers and user assistance for complex customer questions.

AnswerFlow enables you to create and deploy service processes that provides automated guidance that increases agent productivity and improves service quality by prompting users for guiding leveraging rich contextual data from internal and external systems to diagnose and resolve complex service processes with guided knowledge delivery.

Some of the benefits of AnswerFlow include:

- Presents knowledge in a prescribed, repeatable manner.
- Enhances answer accuracy by bringing in additional CRM content.
- Visual process mapping to streamline service processes.
- Framework that allows transactional data to influence the service process model.

AnswerFlow is ideal in environments where delivering answers meets most or all of the following criteria:

- **Answers are conditional** – The answer may be based on a customers account status or the specific piece of equipment they are using.
- **Answer diagnostics are complex** – The question has many potential answers. Getting the correct answer involves asking several detailed questions to eliminate other possibilities.
- **Answers require knowledge** – Delivering the right answer requires the use of accurate information whether it is dynamic customer data or static corporate policies.

The components of the AnswerFlow application include:

- the Editor, which you use to create and manage AnswerFlow processes, context variables, and service calls
- the datastore, which stores the AnswerFlow objects
- the Runtime user interface, which you use to display AnswerFlow processes to end-users, and which you can customize to integrate with your application's look and feel

# Planning to Install Oracle Knowledge

This chapter provides an overview of the installation process and describes the requirements for installing, configuring, and operating Oracle Knowledge products.

## Installation Process Overview

The following is a summary of the tasks required for installing Oracle Knowledge:

- 1** Design the Knowledge Management (KM) system topology. A typical installation requires instances for indexing content, answering questions, creating knowledge, displaying the knowledge enhanced UI, analytics transformation, and reporting. Separate environments are typically configured for development, staging, and production usage. The WebLogic domain should be defined at this point as well. Load balancers, external web servers, and firewalls should be included based on the requirements of the organization.
- 2** For each environment (development, staging, production) install the pre-requisite software. A database server is needed with schemas for the content processing, knowledge creation, and analytics staging and reporting. Install WebLogic, Oracle Data Integrator, and Oracle Business Intelligence on the designated KM machines should be done prior to starting any of the installations of the Oracle Knowledge components.
- 3** Install the Oracle Knowledge components. The components can be installed in any order to accommodate the specifics of the environment being configured. In general it is a good idea to install all of the components of a single type (Search, IM, etc) in an environment at the same time to make sure that they are all working together properly. After the instances of each component are installed, the configuration between components can be completed as needed.
  - a** Common Environment is a common operational environment for Oracle Knowledge applications that is installed and configured as part of the standard installation process. The Common Environment contains tools and utilities that assist in creating, administering, and maintaining Oracle Knowledge instances and applications, enabling you to easily:
  - b** Intelligent Search - The Search application consists of content processing components and runtime components. The content processing components should be installed prior to installing the runtime components. Once the content processing components are installed - content collections can be created and the indexing process can begin. Once the indexing process is complete, the indexes and configuration can be synchronized and propagated to the search runtime instances in the environment.
  - c** Information Manager - The IM application consists of an administration console, a web services application, and a JSP custom tag library that is used by the InfoCenter based web applications. Typically the IM admin console and web services are installed first. Once the IM admin console is installed, the KM system can be configured, content and users can be imported, workflows defined,

and IM content can be indexed by Intelligent Search. The web applications can be deployed at any time after an IM repository is created. This means that after running the installer for the initial installation, after you create the IM repository, you must run the installer again, selecting to install only the web applications you choose to install.

- d Analytics - The analytics application consists of a JMS queue and event listener that writes incoming events into a staging database. Oracle Data Integrator (ODI) and Oracle Business Intelligence (OBIEE) is used to transform and report on the events that get generated by the Oracle Knowledge applications. Search and IM both need to be configured with the correct JMS queue information in order to send events to the Analytics subsystem. The default values should be used for a first time installation to avoid having to jump back and forth during the installation process.
  - e AnswerFlow - the AnswerFlow application is a business process design utility that is used to orchestrate specific business flows to solve a specific problem. It requires access to IM and Search and should be installed after those components are installed and operational.
- 4 Perform post installation configuration and validation steps. The installers help you get all of the Oracle Knowledge components installed correctly. Depending on your configuration needs for a particular environment there must be some post installation configuration work in order for the environment to work together properly. This typically involves setting up load balancers, firewalls, and external web servers to server static content. Integrating into existing security mechanisms is out of the scope of this manual.

## Installation Planning Worksheet

Use the following worksheet to help collect the necessary information needed to successfully install all of the Oracle Knowledge components in each environment. You may have multiple instances of a given component. You should have a detailed network architecture diagram for each environment that completely specifies the number of instances, load balancers, and firewall configuration.

| Environment | Host Name | IP Address | Type of Instance          | TCP Port <sup>1</sup> |
|-------------|-----------|------------|---------------------------|-----------------------|
| Development |           |            | Content Processing        | 8222                  |
| Development |           |            | Search Runtime            | 8223                  |
| Development |           |            | InfoManager               | 8226                  |
| Development |           |            | InfoCenter                |                       |
| Development |           |            | IM Client Library         | 8226                  |
| Development |           |            | WebLogic Domain Server    | 7001                  |
| Development |           |            | WebLogic JMS queue server |                       |
| Development |           |            | ODI Server                |                       |
| Development |           |            | OBIEE Server              |                       |

1. The worksheet reflects the default port value as recommended in the installed version of Oracle Knowledge.

## Oracle Knowledge Installation Requirements

This section describes requirements for installing Oracle Knowledge products, including:

- Operating System requirements, as described in “Oracle Knowledge System Requirements” on page 21.
- Application server integration, as described in “Application Server Requirements” on page 21.
- Databases and database drivers, as described in “Oracle Knowledge Database Schema Requirements” on page 22.



- Disk space requirements, as described in “Oracle Knowledge Disk Space Requirements” on page 23.
- User permissions, as described in “Oracle Knowledge User Permissions” on page 23.
- Java Virtual Machine (JVM) allocation requirements, as described in “Oracle Knowledge Java Virtual Machine (JVM) Allocation Requirements” on page 24.
- Tasks necessary for acquiring and installing recommended UNIX utilities, as described in “UNIX grep, rm, tail, and wget Utilities” on page 24.
- Keystore requirements, as described in “Creating the Oracle Knowledge Keystore” on page 24.
- ODI requirements for Oracle Knowledge Analytics, as described in “ODI Server Requirements” on page 27.
- OBIEE requirements for Oracle Knowledge Analytics, as described in “Report Server (OBIEE) Requirements” on page 27.

## Oracle Knowledge System Requirements

Oracle Knowledge has the following system requirements:

- 4 GB of RAM for each Oracle Knowledge instance (recommended)
- minimum of two processor cores (2GHz+) for each instance

Supported 64 bit operating systems include:

- Oracle Linux
- Oracle Solaris
- Red Hat Enterprise Linux
- Microsoft Windows Server

Supported databases include:

- Oracle
- Microsoft SQL Server 2008

See the *Supported Environments Matrix* in the Oracle Knowledge Documentation Library for complete information on supported operating systems, databases, application servers, and other components.

## Application Server Requirements

Oracle Knowledge is supported on the following application servers:

- Oracle WebLogic
- Apache Tomcat
- IBM Websphere

We recommend that you configure a separate WebLogic domain for each Oracle Knowledge environment, and that you install each Oracle Knowledge application instance in a separate managed server on the domain. Select Sun SDK as the JDK for WebLogic domains.

See the *Supported Environments Matrix* in the Oracle Knowledge Documentation Library for complete information on supported application servers.

**Important!** See *Installing and Configuring Oracle Knowledge (IBM Websphere Application Server)* in the Oracle Knowledge Documentation Library for instruction on installing and configuring Oracle Knowledge to use Websphere application servers.

## Oracle Knowledge Database Schema Requirements

Oracle Knowledge requires a database schema for the following components:

- Intelligent Search application content and internal data storage (needed during content processing operations)
- Information Manager content and metadata storage (needed for content authoring and runtime content access)
- Analytics staging and reporting data storage

Configure the database server to store UTF-8 formatted information to take full advantage of Oracle Knowledge's multilingual capabilities. Consult the appropriate product documentation for configuration instructions.

## Requirements and Guidelines for Creating Database Schemas for Oracle Knowledge

We recommend that you follow these guidelines when you create database schemas:

- Create the schemas for each component with separate tablespaces for data and indexes.
- Create the Search and Information Manager schemas on a database instance specifically configured for OLTP operations.
- Create the Analytics schemas on a database instance specifically configured for data warehousing operations.
- Configure the Information Manager schemas to be case insensitive.
- Configure the Intelligent Search schemas to be case sensitive.

On SQL Server databases hosting Analytics Reporting schema, you must:

- activate row versioning to enable Read Commit Snapshot.
- use Microsoft Data Access Components (MDAC), also known as Windows DAC, on the Report server in order to connect OBIEE to the SQL Server database.

## VIEWING DATABASE SCHEMA INFORMATION

You can view the details of the Information Manager and Analytics database schema by browsing the data dictionary documentation located at:

- <IM\_INSTALL\_ROOT>/InfoManager/database/datadictionary.html
- <ANALYTICS\_INSTALL\_ROOT>/inquiria/sql/documentation/DW\_REPORTING/index.html
- <ANALYTICS\_INSTALL\_ROOT>/inquiria/sql/documentation/DW\_STAGE/index.html

## Microsoft SQL Server Database Collation Values

For Microsoft SQL Server databases, specify the following collation values:

| Product or Module   | Database            | Collation                    |
|---------------------|---------------------|------------------------------|
| Intelligent Search  | All                 | Latin1_General_CS_AS         |
| Information Manager | Application content | Latin1_General_CI_AI         |
| Analytics           | Staging             | SQL_Latin1_General_CP1_CI_AS |
| Analytics           | Reporting           | SQL_Latin1_General_CP1_CI_AS |
| Analytics           | ODI Work            | SQL_Latin1_General_CP1_CI_AS |
| Analytics           | OBIEE               | SQL_Latin1_General_CP1_CS_AS |

The SQL Server collation values are:

- AI is Accent Insensitivity
- AS is Accent Sensitivity
- CI is Case Insensitivity
- CS is Case Sensitivity

**Important!** If case sensitivity is not properly set, you may incur unique key violation errors when loading application data.

## Oracle Knowledge Disk Space Requirements

Oracle Knowledge disk space requirements largely depend on the amount of application data to be processed. We recommend that a shared disk array be used to store attachments to Information Manager documents. You can also use shared disk space to centralize configuration information, which simplifies maintenance operations. The application or shared disk space should be included in a regular backup and virus-scanning operations. Allocate a minimum of 50 GB for each environment (development, staging, and production). Closely monitor the disk space usage on both the database server and the file server as content is imported.

In addition:

- The product code requires approximately 2 GB of disk space for installation and configuration.
- The application logs require up to 6 GB for each instance running under the Oracle Knowledge service.
- The application content space requirement ranges from 10 to 30 times the size of the content that you intend to process.

## Oracle Knowledge User Permissions

To install and operate Oracle Knowledge products on Linux, you must be logged on as a non-root user. Create a standard Oracle Knowledge administrative user to install and run Oracle Knowledge. This user must have permission to access network shares while running as a service.

In general, all of the Oracle Knowledge applications should be owned by an application user account created on the operating system, and not from a normal user account. For convenience, it is useful to add this application user account to an Administrative user group, so that other authorized administrators can view and edit the installation files. The owner and group should have full control over the file in the installation directory.

To install and operate Oracle Knowledge products on Windows 2008, you must be logged on as a user who belongs to the Administrators group.

**Note:** Do not install, configure, or operate other Oracle Knowledge or supplementary software components as a user with root privileges. The functions that Oracle Knowledge products use to maintain data integrity do not operate properly if the user that owns the Oracle Knowledge processes has root permissions.

## Oracle Knowledge Java Virtual Machine (JVM) Allocation Requirements

You must allocate sufficient memory to the Java Virtual Machine (JVM) process for the Oracle Knowledge application and the associated Web server or application server. Configuring JVM parameters related to memory usage and garbage collection contributes to product performance; in general, product performance improves when you allocate a larger Java heap size. Optimal memory allocation, stack size, heap size, and garbage collection settings vary, depending on several factors, including:

- The resources available to the JVM in your environment
- The amount of application data that a given instance will be processing

## UNIX grep, rm, tail, and wget Utilities

In order to use certain Common Environment commands, customers that have deployed or plan on deploying on Windows operating systems must install the grep, rm, tail, and wget UNIX utilities prior to installing Oracle Knowledge software.

Microsoft provides ports of all of the required UNIX utilities as part of their Microsoft Services for Unix (SUA) interoperability service package. These service packages are available at no charge from Microsoft's Web site. Here are links to the available packages:

- <http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=23754> (Windows 2008, Windows Vista)
- <http://technet.microsoft.com/en-us/library/cc771672.aspx> (Windows 7)
- <http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=20983> (Windows 2003)

The location of these files might change over time.

After the SUA package is installed and available on the SYSTEM path, the existing Common Environment scripts work normally. To verify that the UNIX utilities were properly installed and available inside the Common Environment, do the following.

- 1 After installing the UNIX utilities, open a command line prompt.
- 2 Execute one of the commands, such as grep, and see if the command responds as expected:

```
C:\Oracle\Knowledge\instances\MyCompany > grep
C:\Oracle\Knowledge\instances\MyCompany > Usage: grep [OPTION]... PATTERN
[FILE]...
```

Use `grep --help` for more information.

## Creating the Oracle Knowledge Keystore

You must create a single encryption keystore that all Oracle Knowledge applications use. The keystore is a repository for the site-specific key that encrypts all sensitive data. Oracle Knowledge uses the shared keystore to generate and access encrypted strings that are used across all products in your environment.

## Requirements for Creating the Keystore

You must create the keystore in a location that all Oracle Knowledge applications can access.

Important: If you cannot place the keystore in a shared location, you must manually copy it to each Oracle Knowledge product installation, as described in “Manually Copying the Keystore to Additional Instances” on page 26.

You must use the installation program to create the keystore and configure all products to use the keystore as described in “Specifying the Oracle Knowledge Keystore” on page 26.

## Recommendations for Creating the Keystore

We recommend that you:

- Select a keystore location that is protected from external access
- Create a secure backup copy of the keystore
- Record the Keystore Password, Site Name, and Key Password values that you specify in “Specifying the Oracle Knowledge Keystore” on page 26 in a secure location for future reference
- Use the default installation keystore file permissions as described in “Keystore Access Permissions” on page 25

## Keystore Contents

The keystore contains the following files:

| File         | Description                                                     |
|--------------|-----------------------------------------------------------------|
| ewallet.p12  | This is the Oracle wallet, which stores all encrypted keys.     |
| keystore.jks | This is the keystore, which stores the public key certificates. |

## Keystore Access Permissions

The installer sets the following file permissions for the keystore directory and files to enable administrators of other installed products to access the keystore.

### DEFAULT KEYSTORE DIRECTORY PERMISSIONS

The installer sets the keystore directory permissions to 774:

| User  | Read | Write | Execute |
|-------|------|-------|---------|
| Owner | Yes  | Yes   | Yes     |
| Group | Yes  | Yes   | Yes     |
| World | Yes  | No    | No      |

### DEFAULT KEYSTORE FILE PERMISSIONS

The installer sets the keystore file and wallet file permissions to 644:

| User  | Read | Write | Execute |
|-------|------|-------|---------|
| Owner | Yes  | Yes   | No      |

|       |     |    |    |
|-------|-----|----|----|
| Group | Yes | No | No |
| World | Yes | No | No |

## Keystore Parameters

You must specify the following information when you create the keystore during the installation process:

|                          |                                                         |
|--------------------------|---------------------------------------------------------|
| <b>Keystore Password</b> | The password that protects the keystore.                |
| <b>Site Name</b>         | The identifier for the encryption key.                  |
| <b>Key Password</b>      | The password that protects the keystore encryption key. |

## Specifying the Oracle Knowledge Keystore

Each Oracle Knowledge installation program prompts you to specify the keystore location. We recommend that you follow this process to specify a common keystore:

- Designate a secure location that is accessible to all Oracle Knowledge products that you install.
- Specify this location when you install the first Oracle Knowledge product in your environment.

The installation program then creates the keystore in the specified location, when you have completed the first Oracle Knowledge product installation.

- Create a secure backup copy of the keystore directory.
- Specify this same key store location for each subsequent Oracle Knowledge installation.

## Manually Copying the Keystore to Additional Instances

We recommend that you create and configure the keystore in a location that all Oracle Knowledge applications can access. If you cannot place the keystore in a shared location, you must manually copy it to each Oracle Knowledge product installation.

**Important!** You must manually copy the keystore to the each instance's product directory before you start the installation program for each instance.

To manually copy the keystore:

- Use the installation program to create the keystore during your initial product installation as described in “Specifying Keystore Parameters” on page 47
- Copy the keystore directory to the desired location for each instance before starting the installation program for each subsequent installation

## Planning the Oracle Knowledge Analytics Installation

This section describes the requirements and prerequisites for installing and configuring Analytics.

**Important!** To install Analytics, see “Installing Oracle Knowledge Analytics” on page 128.

## User Requirements

The information in this chapter assumes that you have a working knowledge of how to:

- create and use Oracle and Microsoft SQL database schemas
- install and use the Weblogic server and JMS Router
- install and use ODI
- install and use OBIEE

## Analytics Installation Planning Checklist

Check the following list before, during, and after the installation to ensure all components are installed and configured correctly:

- verify the physical and logical requirements
- identify all the environments and servers on which you must install Analytics.
- create the Analytics data warehouse with staging, reporting and odi\_work database schemas
- calculate your tablespace requirements and add tablespace as needed
- increase the number of server processes, if needed
- modify the number of redo logs
- install the Weblogic server
- install ODI as a standalone agent
- install OBIEE

## Verifying Analytics Physical Requirements

The first step in planning your installation is to verify your physical and logical requirements.

### Recommended Server and Processor Deployment

We recommend installing ODI and OBIEE on separate physical (or virtual) machines in the production environment. In other environments, such as Development and Staging, they can be co-located.

### Analytics Server and Database Requirements

“Oracle Knowledge Installation Requirements” on page 20 describes most of the hardware, software, and database requirements for Oracle Knowledge applications, including Oracle Knowledge Analytics.

### ODI Server Requirements

For information on hardware and software requirements to set up ODI, see *Fusion Middleware Installation Guide for Oracle Data Integrator*.

### Report Server (OBIEE) Requirements

For information on OBIEE hardware and software requirements, installation requirements, and instructions for installing, configuring, and removing Oracle Business Intelligence products, see *Fusion Middleware Installation Guide for Oracle Business Intelligence*.

The initial Analytics configuration process requires the OBIEE Administration Tool, which runs only on Windows. Consult the OBIEE documentation for specific Administration Tool requirements.

**Important!** If you are using an SQL Server database, you must use Microsoft Data Access Components (MDAC), also known as Windows DAC, on the Report server in order to connect OBIEE to the SQL Server database.

## Oracle WebLogic Requirements (Windows)

The Oracle Knowledge Analytics JMS Event Router is deployed to a WebLogic Server. For information and procedures to install WebLogic Server, see *Fusion Middleware Installation Guide for Oracle WebLogic Server*.

After WebLogic Server has been successfully installed, create a new domain where Analytics is deployed by following the instructions in *Oracle Fusion Middleware Creating Domains Using the Configuration Wizard 11g*.

- Be sure to configure the domain's WebLogic Startup Mode to Production Mode. Make certain that Tunneling is enabled on the target server.
- Be sure to select the JDK Selection as Sun SDK.
- At the end of the domain configuration wizard, select the check box to Start Admin Server.

If you have previously installed WebLogic Server and plan to use an existing domain, make sure that the Administration Server is running before starting the Analytics installer.

## Verifying the Analytics Installation Environments

A typical Oracle Knowledge Analytics installation occurs on a number of different servers and environments. In general, at least one server is dedicated to data transformation (ODI) and another server is dedicated to reporting (OBIEE).

You must run the Analytics installer for each of the following environments in your system; Developer, QA, Staging, and Production. This may result in, depending on the number of environments in your system, installing Analytics three or four times.

Install the Analytics components as follows:

- Install the database schemas on a dedicated server.
- Install ODI and the JMS router on a single server, or on separate dedicated servers, depending on the server configuration.
- Install OBIEE on a dedicated server

## Verifying the Analytics Components

The next step is to verify the Analytics components. An Analytics application consists of multiple components configured to extract, store, and present data collected from one or more configured Intelligent Search, Information Manager or Answer Flow instances. Analytics components include:

- the data warehouse, which stores the Intelligent Search and Information Manager event data in a staging schema, and stores reporting data in a reporting schema. It includes the staging, reporting, and ODI\_work schemas, which create and populate the Analytics reporting and staging database tables. See "Creating the Analytics Data Warehouse Environment".
- the JMS event router, which is deployed to a WebLogic server and is sent Analytics event data through the Java Messaging Service (JMS); it processes this event data, then stores it in the staging schema. It is independent upon OBIEE & ODI so make sure both are installed.



- a configured Oracle Data Integrator (ODI) instance to convert staging data from the staging schema to reporting data in the reporting schema. See the procedures in the “Installing Oracle Data Integrator (ODI)” section.
- a configured Oracle Business Intelligence Enterprise Edition (OBIEE) instance, which provides the user interface for generating, viewing, and working with reports from data in the reporting schema. See the “Installing Oracle Business Intelligence Enterprise Edition (OBIEE)” section.

We recommend that you install ODI and OBIEE on separate physical (or virtual) machines in the Production environment. In other environments, such as Development and Staging, they can be co-located.

## Creating the Analytics Data Warehouse Environment

A data warehouse integrates data from various sources to a central repository and stores current and historical data used for creating trending reports. Data warehouses are designed to help you analyze data; for example, to learn more about your company's sales data, you can build a warehouse that concentrates on sales.

The Analytics data warehouse environment consists of the following requirements:

- a reporting schema
- a staging schema
- an ODI\_WORK schema
- database privileges
- database tablespace

## Creating the Required Database Schemas

Before installing Analytics, you must create the following three schemas in one database:

- a reporting schema (must be named **DW\_REPORTING**)
- a staging schema (must be named **DW\_STAGE**)

**Note:** `DW_REPORTING` and `DW_STAGE` must have read, write, and truncate access on the `WORK` schema.

- an `ODI_WORK` schema (can have any name). ODI uses the work schema to manage the temporary tables it needs for its loading, integration and transformation from the various sources to the target.

## Adding Database Privileges to Schemas

Privileges control which users can modify database objects owned by another user. They are granted or revoked either by the instance administrator, a user with the `ADMIN` privilege or, for privileges to a certain object, by the owner of the object.

If the correct level of privileges are not granted, an *Insufficient privileges* error may occur. To avoid these errors, add the following database privileges to the database schemas.

## Adding Database Privileges to Schemas on Oracle Server

**Note:** For the procedure to grant or revoke privileges, see the *Providing authorization to objects through privileges* procedure located here:

[http://docs.oracle.com/cd/E11882\\_01/timesten.112/e21633/accesscontrol.htm#TTOPR242](http://docs.oracle.com/cd/E11882_01/timesten.112/e21633/accesscontrol.htm#TTOPR242)

- 1 Log into the Oracle database.
- 2 Create the DW\_STAGE, DW\_REPORTING, and WORK schemas, and then grant the privilege statements to the schemas, as shown in the following sections.

### DW\_STAGE SCHEMA

**Create the DW\_STAGE Schema:**

```
CREATE USER DW_STAGE
IDENTIFIED BY <password>
DEFAULT TABLESPACE <tablespace>
TEMPORARY TABLESPACE <tablespace>
PROFILE DEFAULT ACCOUNT UNLOCK;
```

**Grant the following Privileges to the DW\_STAGE Schema:**

```
GRANT CONNECT TO DW_STAGE;
GRANT RESOURCE TO DW_STAGE;
ALTER USER DW_STAGE DEFAULT ROLE ALL;
ALTER USER DW_STAGE QUOTA UNLIMITED ON <tablespace>;
GRANT UNLIMITED TABLESPACE TO DW_STAGE;
```

### DW\_REPORTING SCHEMA

**Create the DW\_REPORTING Schema:**

```
CREATE USER DW_REPORTING
IDENTIFIED BY <password>
DEFAULT TABLESPACE <tablespace>
TEMPORARY TABLESPACE <tablespace>
PROFILE DEFAULT ACCOUNT UNLOCK;
```

**Grant the following Privileges to the DW\_REPORTING Schema:**

```
GRANT CONNECT TO DW_REPORTING;
GRANT RESOURCE TO DW_REPORTING;
```

**Grant the following SYSTEM Privileges to the DW\_REPORTING Schema:**

```
GRANT ANALYZE ANY TO DW_REPORTING;
GRANT UNLIMITED TABLESPACE TO DW_REPORTING;
```

**Grant the following OBJECT Privileges for the DW\_REPORTING Schema**

```
GRANT SELECT, UPDATE, DELETE ON DW_STAGE.DW_STG_DATA TO DW_REPORTING;
GRANT SELECT, UPDATE, DELETE ON DW_STAGE.DW_STG_EVENT TO DW_REPORTING;
```

### ODI\_WORK SCHEMA

**Create the ODI\_WORK Schema:**

```
CREATE USER ODI_WORK
IDENTIFIED BY <password>
DEFAULT TABLESPACE <tablespace>;
GRANT RESOURCE TO ODI_WORK;
GRANT CONNECT TO ODI_WORK;
ALTER USER ODI_WORK DEFAULT ROLE ALL;
ALTER USER ODI_WORK QUOTA UNLIMITED ON <tablespace>;
GRANT UNLIMITED TABLESPACE TO ODI_WORK;
```

**Grant the following SYSTEM Privileges to the ODI\_WORK Schema:**

```
GRANT ANALYZE ANY TO ODI_WORK;
GRANT DELETE ANY TABLE TO ODI_WORK;
GRANT DROP ANY TABLE TO ODI_WORK;
GRANT INSERT ANY TABLE TO ODI_WORK;
GRANT SELECT ANY SEQUENCE TO ODI_WORK;
GRANT SELECT ANY TABLE TO ODI_WORK;
GRANT UPDATE ANY TABLE TO ODI_WORK;
```

## Using DW\_REPORTING Schema as ODI\_Work Schema

The ODI\_WORK schema does all the work for the physical schemas (DW\_REPORTING, and DW\_STAGE), so it requires higher level privileges to access, select, update, delete, etc. on the objects owned by those schemas. For example, the ODI\_WORK schema requires the DROP ANY TABLE privilege to truncate the DW\_REPORTING tables to perform the ETL.

However, granting the higher SYSTEM level privilege, which is similar to a DBA privilege, may be less restrictive than desired and you may not want to grant these privileges to the ODI\_WORK schema. The alternative approach is to use the DW\_REPORTING schema as the ODI\_WORK schema.

## Adding Database Privileges to Schemas on Microsoft SQL Server

Use the following procedure to add privileges to the MSSQL server.

- 1 Log into SQL Server Management Studio (SSMS) as System Administrator (sa) user.
- 2 Create databases named DW\_STAGE, DW\_REPORTING and WORK.
- 3 Create a login named ODIWORK.
- 4 Assign *public* and *sysadmin* server roles to the ODIWORK login.
- 5 Map the DW\_STAGE, DW\_REPORTING and WORK databases and ODI Repository database to the ODIWORK login.

## Creating the Required Database Tablespaces

A database's data is collectively stored in the database's tablespace; as a database administrator, you can create a new tablespace (defined by an additional datafile) to increase the size of a database.

## Calculating the Tablespace Capacity

To ensure an adequate amount of database space for Analytics processing, use this procedure to calculate the approximate amount of tablespace you must allocate to your databases.

- 1 Determine your general daily traffic (searches and documents); for example your knowledge base receives 5000 questions and 5000 document views.
- 2 Use the following algorithm to calculate how much tablespace you require, where:
  - one question = 20 events,
  - one document view = 10 events
$$(Q * 20) + (Doc * 10) = \text{Total events}$$

For the example of 5000 questions and 500 document views received:

$$(5000 * 20) + (5000 * 10) = 150000 \text{ events}$$
- 3 Allocate the proper tablespace.
 

For each 100,000 events generated, allocate 2GB of total tablespace:

  - 1.66 GB for the Staging schema
  - 272 MB for the Reporting schema

For the example above, you want to allocate 4GB of tablespace.

## Creating Tablespaces

Create the following tablespaces for the Analytics databases. For step-by-step instructions on creating tablespaces, see *Oracle® Database Administrator's Guide* located here:

[http://docs.oracle.com/cd/B28359\\_01/server.111/b28310/tspaces002.htm](http://docs.oracle.com/cd/B28359_01/server.111/b28310/tspaces002.htm)

### CREATE THE DW\_STAGE TABLESPACES

Create the DW-STAGE tablespace

```
CREATE TABLESPACE PERF_DW_STAGE DATAFILE
'<PATH_TO_DATAFILES_LOC>/PERF_dw_stage1.dbf' SIZE 20G,
'<PATH_TO_DATAFILES_LOC>/PERF_dw_stage2.dbf' SIZE 20G,
'<PATH_TO_DATAFILES_LOC>/PERF_dw_stage3.dbf' SIZE 20G,
'<PATH_TO_DATAFILES_LOC>/PERF_dw_stage4.dbf' SIZE 20G,
'<PATH_TO_DATAFILES_LOC>/PERF_dw_stage5.dbf' SIZE 20G
NOLOGGING EXTENT MANAGEMENT LOCAL SEGMENT SPACE MANAGEMENT AUTO;
```

Create the DW-STAGE temporary tablespace

```
CREATE TEMPORARY TABLESPACE PERF_DW_STAGE_TEMP TEMPFILE
'<PATH_TO_DATAFILES_LOC>/PERF_dw_stage_temp1.dbf' SIZE 20G,
'<PATH_TO_DATAFILES_LOC>/PERF_dw_stage_temp2.dbf' SIZE 20G,
'<PATH_TO_DATAFILES_LOC>/PERF_dw_stage_temp3.dbf' SIZE 20G,
'<PATH_TO_DATAFILES_LOC>/PERF_dw_stage_temp4.dbf' SIZE 20G,
'<PATH_TO_DATAFILES_LOC>/PERF_dw_stage_temp5.dbf' SIZE 20G;
```

## CREATE THE DW-REPORTING TABLESPACES

Create the DW\_REPORTING tablespace.

```
CREATE TABLESPACE PERF_DW_REPORTING DATAFILE
'/<PATH_TO_DATAFILES_LOC>/PERF_dw_reporting1.dbf' SIZE 20G,
'/<PATH_TO_DATAFILES_LOC>/PERF_dw_reporting2.dbf' SIZE 20G,
'/<PATH_TO_DATAFILES_LOC>/PERF_dw_reporting3.dbf' SIZE 20G,
'/<PATH_TO_DATAFILES_LOC>/PERF_dw_reporting4.dbf' SIZE 20G,
'/<PATH_TO_DATAFILES_LOC>/PERF_dw_reporting5.dbf' SIZE 20G
EXTENT MANAGEMENT LOCAL SEGMENT SPACE MANAGEMENT AUTO;
```

Create the DW\_REPORTING temporary tablespace

```
CREATE TEMPORARY TABLESPACE PERF_DW_REPORTING_TEMP TEMPFILE
'/<PATH_TO_DATAFILES_LOC>/PERF_dw_reporting_temp1.dbf' SIZE 20G,
'/<PATH_TO_DATAFILES_LOC>/PERF_dw_reporting_temp2.dbf' SIZE 20G,
'/<PATH_TO_DATAFILES_LOC>/PERF_dw_reporting_temp3.dbf' SIZE 20G,
'/<PATH_TO_DATAFILES_LOC>/PERF_dw_reporting_temp4.dbf' SIZE 20G,
'/<PATH_TO_DATAFILES_LOC>/PERF_dw_reporting_temp5.dbf' SIZE 20G;
```

## Increasing the Number of Server Processes

You can increase the number of processes available to service requests. When you deploy more processes, the system can handle more requests, so increasing the number of processes increases system capacity.

- 1 From an SQL prompt, run the following:

```
show parameter processes;
```

Results:

```
NAME TYPE VALUE
processes integer 150
```

- 2 **Optional.** If the VALUE is 150 (default) or less, run the following statement to increase:

```
alter system set processes=450 scope=spfile;
```

- 3 Restart the database.

## Adding Redo Log Files

Redo logs store all changes made to the database as they occur; every instance of an Oracle Database has an associated redo log to protect the database in case of an instance failure.

Tuning the redo log options can provide performance improvement. Generally, larger redo log files provide better performance by reducing checkpoint activity.

You must create at least three redo logs, and each file should be 2G. However, to maximize Analytics performance, we recommend that you create 10 redo log files. Each file should be about 1G.

For more information and procedures for creating redo logs, see *Oracle® Database Administrator's Guide*.

## Creating and Configuring a JMS Error Queue

We recommend that you set up a JMS error queue (also called error destination) for messages that have expired or reached their redelivery limit. If you don't configure an error queue, then these messages are simply dropped.

The descriptions, definitions, and procedures for creating and configuring error queues are located here:

[http://docs.oracle.com/cd/E28280\\_01/web.1111/e13738/basic\\_config.htm#JMSAD167](http://docs.oracle.com/cd/E28280_01/web.1111/e13738/basic_config.htm#JMSAD167)

**Note:** We recommend that you access the Oracle WebLogic Server Administration Console Online Help before you attempt to create a new error queue. This online help provides complete procedures for each step below, as well as definitions and descriptions of the JMS components and inputs. It is located here:

[http://docs.oracle.com/cd/E28280\\_01/apirefs.1111/e13952/core/index.html](http://docs.oracle.com/cd/E28280_01/apirefs.1111/e13952/core/index.html)

### Creating an Error Queue

- 1 Make sure you have configured at least one JMS server.

The Configuring JMS Servers procedure is located here:

[http://docs.oracle.com/cd/E28280\\_01/apirefs.1111/e13952/taskhelp/jms\\_servers/ConfigureJMSServers.html#WLACH01907\\_\\_snmp1115318](http://docs.oracle.com/cd/E28280_01/apirefs.1111/e13952/taskhelp/jms_servers/ConfigureJMSServers.html#WLACH01907__snmp1115318)

- 2 Start the WebLogic Administration Server.

The Start the Console procedure is located here:

[http://docs.oracle.com/cd/E12839\\_01/apirefs.1111/e13952/taskhelp/console/StartTheConsole.html](http://docs.oracle.com/cd/E12839_01/apirefs.1111/e13952/taskhelp/console/StartTheConsole.html)

- 3 Navigate to JMS Modules and select the JMS module for which you want to create an error log.

- 4 Select a module and select **New**.

**a** Select **Lock and Edit** to see all buttons.

- 5 Select *Queue* and select **Next**.

- 6 Provide a name for the error queue and JNDI and select **Next**.

Information about JNDI is located here:

[http://docs.oracle.com/cd/E28280\\_01/web.1111/e13730/toc.htm#WJNDI119](http://docs.oracle.com/cd/E28280_01/web.1111/e13730/toc.htm#WJNDI119)

- 7 Select or create a new subdeployment and the resulting target for the error queue, and select **Finish**.

The creating subdeployments procedure appears in the *JMS System Module: Create Subdeployment*, located here:

[http://docs.oracle.com/cd/E28280\\_01/apirefs.1111/e13952/pagehelp/JMSjmsssystemmodulecreatesubdeploymenttitle.html#tasks](http://docs.oracle.com/cd/E28280_01/apirefs.1111/e13952/pagehelp/JMSjmsssystemmodulecreatesubdeploymenttitle.html#tasks)

The Summary of Resources page appears with the new queue added to the list.

### Changing the Weblogic JMS Redelivery Limit

The *redelivery limit* is the number of attempts a message can make before the message is moved to a user-specified error target destination. When a message is rolled back or recovered, the redelivery delay is the amount of time a message is put aside before an attempt is made to redeliver the message.

The following procedure sets the redelivery limit attribute for a JMS queue. The default value of -1 specifies that the destination will not override the message sender's redelivery limit setting; in other words the redelivery limit is endless. We strongly recommend you change the value of this attribute to 10.

To change the redelivery limit:

- 1 Log onto the Weblogic Administrator console.
- 2 At **Domain Structure**, select **Services**.
- 3 Select **Messaging**.
- 4 At the Configuration tab, select the **JMS Modules > SystemModule-OracleKnowledgeModule > Queue-AnalyticsQueue > Delivery Failure** tab.
- 5 At **Redelivery Limit**, enter the new value of **10**.

For more information on the JMS message redelivery limit, see *Configuring a Message Redelivery Limit On a Destination*.

## Installing Oracle Data Integrator (ODI)

ODI is not included in the Oracle Knowledge product distribution.

Installations that generate a large volume of analytic data require the installation of additional Java agents on additional servers to process the data transformation efficiently. As part of the Analytics installation process you must install and configure an instance of ODI as a standalone agent and at least one Java agent.

For complete information on installing and configuring ODI, see the documentation located here.

### Prerequisites for Installing ODI as a Standalone Agent

Before you begin installing ODI as a stand-alone agent, make sure you have completed the following prerequisites:

- Installed Oracle Database 11g.
- Installed Oracle Data Integrator (ODI) 11gR1
- Created the ODI Master and Work Repositories

For complete information on installing and configuring ODI, see the documentation located here.

### Installing ODI as a Stand-alone Agent

- 1 Navigate to your <oracle\_user> location.
- 2 Generate the encrypted password string with the agent command: `encode.sh password`.
- 3 Edit the `odiparams.sh` by revising the following parameters. This sets the repository connection information for the ODI Agent to use.

**Note:** Use the encrypted password (from step 2) for token <PUT\_ENCODED\_PASSWORD\_HERE>.

```
ODI_INIT_HEAP=2048m
ODI_MAX_HEAP=8192m
ODI_CONNECTION_RETRY_COUNT=1000
ODI_MASTER_ENCODED_PASS = <PUT_ENCODED_PASSWORD_HERE>
```

```
ODI_CONNECTION_RETRY_DELAY=31000
```

- 4 At the Oracle Data Integrator Studio, navigate to Topology > Physical Architecture > Agent > Create New Agent.
- 5 Create a new agent with the following values:
  - a agent name = a name that you assign to the agent
  - b agent hostname = the name of the host location
  - c maximum number of sessions = 250
  - d for all other fields, use the defaults
- 6 From the ODI locations, execute `./agent.sh -NAME=<agent name>` (from step 5a)  
Select the test button on the upper pane for <agent name> to ensure it works properly.
- 7 Navigate to Topology > Contexts > New context and create a new context:
  - a Context name = agent name
  - b Create a Logical Agent for <agent name> and map all the physical agents to it.
  - c At Agents, associate the name of the new logical agent to the new context <agent name>.
- 8 Navigate to Topology > Physical Architecture > Technologies > Oracle > oracle\_server/dw\_reporting  
Add the context <agent name> to the target.
- 9 Navigate to Topology > Physical Architecture > Technologies > Oracle > oracle\_server/dw\_staging  
Add the Context <agent name> to the target.
- 10 Check the redo logs to ensure you have an adequate number. We recommend that you create 10 redo log files; each file should be 500M.

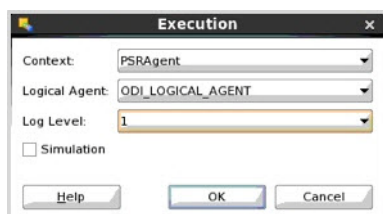
```
SELECT
  GROUP#,
  THREAD#,
  SEQUENCE#,
  ARCHIVED,
  STATUS,
  MEMBER AS REDOLOG_FILE_NAME,
  (BYTES/1024/1024) AS SIZE_MB
```

For example:

```
FROM
  v$log a JOIN v$logfile b ON a.Group#=b.Group#
ORDER BY
  GROUP# ASC;
```



- 11 RUN ODI using the *<agent name>* you created.



## Increasing the ODI Repository Tablespace

After you install ODI, you may need to increase the ODI repository tablespace size.

- 1 In the screen Repository Creation Security: Map Tablespace select **Manage Tablespace**.
- 2 Change the tablespace size to 100GB.
- 3 Select **OK**.

## Installing Oracle Business Intelligence Enterprise Edition (OBIEE)

You must install and configure an instance of OBIEE before using Oracle Knowledge Analytics.

**Important!** The initial Analytics configuration process depends on the OBIEE Administration Tool, which runs only on Windows. Consult the OBIEE documentation for specific Administration Tool requirements. If you are using an SQL Server database, you must use Microsoft Data Access Components (MDAC), also known as Windows DAC, on the Report server in order to connect OBIEE to the SQL Server database. You can locate Microsoft Data Access Components (MDAC) 2.8 SP1 at: <http://www.microsoft.com/download/en/default.aspx>.

You can access the Oracle Business Intelligence documentation library.

## Installing Oracle WebLogic Requirements (Windows)

The Oracle Knowledge Analytics JMS Event Router is deployed to a WebLogic Server. Therefore you must install the WebLogic Server when installing Analytics. For step-by-step procedures to install WebLogic Server, see the "Preparing to Install Oracle Knowledge Using WebLogic".

After WebLogic Server has been successfully installed, create a new domain where Analytics is deployed by following the instructions in *Oracle Fusion Middleware Creating Domains Using the Configuration Wizard 11g*.

- Be sure to configure the domain's WebLogic Startup Mode to Production Mode. Make certain that Tunneling is enabled on the target server.
- Be sure to select the JDK Selection as Sun SDK.
- At the end of the domain configuration wizard, select the check box to Start Admin Server.

If you've previously installed WebLogic Server and plan to use an existing domain, make sure that the Administration Server is running before starting the Analytics installer.

# Preparing to Install Oracle Knowledge Using WebLogic

## Using WebLogic Server with Oracle Knowledge

This chapter provides the following information on WebLogic server:

- **Manage WebLogic Credentials**
- **Start Oracle Knowledge on WebLogic Server**
- **Find the JAVA\_HOME Directory in the WebLogic Installation**

### Manage WebLogic Credentials

The credentials of the user used to boot the managed server are stored in encrypted form in a boot identity file located at `$Oracle_Knowledge_ROOT/instances/<Instance_Name>/boot.properties`. If the credentials need to be updated, the boot identity file also must be modified in order to assume the changes. To update the file, change the user name to be the plain-text form of the new user name and change the password to be the plain-text form of the new password. Restart the server and the server start process encrypts the values and overwrite the file. This must be done before beginning any of the OK Installations.

### Start Oracle Knowledge on WebLogic Server

The Oracle Knowledge applications must be started by starting the specified managed server through the WebLogic Administration Console.

Managed servers can be started through the WebLogic Administration Console by using the WebLogic Server Node Manager. In order to start the managed server, the Node Manager must be running.

**Important!** WebLogic Server must be installed, in Production mode, and the Node Manager and Admin Servers must be running before you start to install any of the Oracle Knowledge products. A domain must be created and any changes to the domain must be activated. The domain cannot be running in edit mode while running installers.

### Starting WebLogic Administrator Console

- 1 Open a command prompt.
- 2 Navigate to the WebLogic Domain Path:

`<weblogic_dir>/Middleware/user_projects/domains/<Company>`  
where `<weblogic_dir>` is the installation directory of your WebLogic Server.

- 3 On Linux, execute `startWebLogic.sh`.  
On Windows, execute `startWebLogic.cmd`

## Starting and Stopping Oracle Knowledge on WebLogic Server

The Oracle Knowledge application(s) must be started by starting the specified managed server through the WebLogic Administration Console.

If the Search runtime instance was not deployed at the time of installation, then you must deploy it from the Common Environment, as described in “Create a Content Processing Instance” on page 69.

You can start Managed Servers through the WebLogic Administration Console by using the WebLogic Server node manager. In order to start the managed server, the node manager must be running.

On Windows, the Node Manager can be installed as a service. If the Node Manager was not installed as a service as part of the installation of WebLogic Server, follow the instructions for installing and removing the Node Manager Service in the post-installation section of the *Oracle Fusion Middleware Installation Guide for Oracle WebLogic Server 11g*.

On Linux, or if you do not want to have the Node Manager run as a service on Windows, you can start the Node Manager manually by following the instructions in “Start Oracle Knowledge on WebLogic Server” on page 38.

- 1 Open a command prompt.
- 2 Navigate to:  
`<weblogic_dir>/Middleware/wlserver_10.3/server/bin`  
where `<weblogic_dir>` is the installation directory of your WebLogic Server.
- 3 On Linux, execute `startNodeManager.sh`. On Windows, execute `startNodeManager.cmd`.
- 4 The Node Manager continues running in the command prompt.

To start or stop the managed server from the WebLogic Administration Console:

- 1 Start the WebLogic Administration Server (if it is not running).
- 2 Using a Web browser, navigate to the WebLogic Administration Console URL. (Located at `http://<Administration Server Listen Address>:<Administration Server Listen Port>/console`.)
- 3 Provide the Administration Server's credentials to log in.
- 4 From the **Domain Structure** section, expand the Environment.
- 5 Select **Servers** to manage and control the Managed Server.
- 6 Select the **Control** tab to start and stop the Managed Server.
- 7 Select the check box of the Managed Server specified in the installation process.
- 8 Select **Start** or **Shutdown/Force Shutdown Now**.  
The **State** of the server now reflects that the server is **STARTING** or **FORCE\_SHUTTING\_DOWN** (for Analytics, the state is **FORCE\_SUSPENDING**).
- 9 Select the refresh icon above the table of servers. When the **State** of the server reflects that the server is running, the Oracle Knowledge application(s) can be accessed. When the State displays **SHUTDOWN**, the server must be restarted to access the Oracle Knowledge application(s).

## Find the JAVA\_HOME Directory in the WebLogic Installation

During the Oracle Knowledge installation process, you need to input the `JAVA_HOME` directory that is used by the WebLogic server. The following instructions guide a System Administrator to find out what `JAVA_HOME` their WebLogic installation is using if they are uncertain.

**Note:** `MW_HOME` in these instructions refer to the Oracle Middleware Home directory (for example `/home/user/Oracle/Middleware`)

- 1 Navigate to `<MW_HOME>/wlserver_10.3/common/bin`
- 2 On Linux, open the `commEnv.sh` file for viewing  
On Windows, open the `commEnv.cmd` file for viewing.
- 3 Find these lines in the file:  

```
Reset JAVA_HOME, JAVA_VENDOR and PRODUCTION_MODE unless JAVA_HOME  
and JAVA_VENDOR are pre-defined.
```
- 4 View the subsequent lines to see the directory that WebLogic sets as the default `JAVA_HOME`.

## Enabling Tunneling

Before running the Analytics installer, make certain Tunneling is enabled on the target server. This should be set by default but you may need to confirm this. To confirm, open the WebLogic Server Administration Console for the target domain to check. Follow these steps:

- 1 Open `<Domain>/Environment/Servers` under Domain Structure.
- 2 Select the target server.
- 3 Open tab **Protocols**, subtab **General**.
- 4 If **Enable Tunneling** is *not* checked:
  - a Select **Lock & Edit**.
  - b Check **Enable Tunneling**.
  - c Select **Save**.
- 5 Select **Activate Changes**.

# Installing Oracle Knowledge Intelligent Search

This chapter describes the installation process for Oracle Knowledge Intelligent Search.

## Intelligent Search Installation Procedure Overview

The following installation process is required:

- 1 Ensure that WebLogic is installed and the Node Manager and Admin Servers are running.
- 2 A WebLogic domain must be configured.  
**Important!** Any changes to your domain must be activated and your domain cannot be running in edit mode while running this installer.
- 3 A database schema must be created for the content store and quality monitor database.
- 4 If Analytics support is being installed, you must know the host name and user credentials of the WebLogic instance serving the queue. If you have modified the default configuration values for the JMS installation, you also need the JNDI information for the JMS queue and connection factory.
- 5 Install and configure the content processing instance.
- 6 Install and configure the search runtimes.

**Note:** If installing on remote servers from the Content processing instance, do not configure any applications within the installer, those are done from the `createApp` utility.

- 7 Verify the installation and operation of the search components is correct.
- 8 Configure local and remote instances for operation, as described in Creating and Configuring an Oracle Knowledge Application.

## Running the Intelligent Search Installer

Ensure that the Node Manager server and Admin Server are both running before starting this installation.

**WARNING!** Do not install Intelligent Search into an existing managed server. The application deployments require the managed server to make changes to the server start classpath and arguments before the server starts the applications

You start the Intelligent Search installer by following the appropriate steps for your environment.

## Starting the Installer in Windows Environments

On Windows 2008, the user must be part of the Administrators group to install and operate Oracle Knowledge products.

To start the installer in Windows environments:

Double-click the installation file

– or –

Run the file using the command line with the following command:

```
install_search_<app_server>_<operating_system>_build_<#>.exe
```

## Starting the Installer in Linux Environments

On Linux, Oracle Knowledge software must be installed using a non-root user. Before running the installer, create a standard Oracle Knowledge admin (Linux) user in the operating system. This user installs and runs the Oracle Knowledge software and must be given permission to access network shares while running as a service.

To start the installer in Linux environments:

- 1 Open a bash shell by entering bash command:

```
bash
```

- 2 Use `cd` to go to the installer temporary directory.

- 3 Set the default locale for the bash shell to `en_US` by entering the following:

```
export LC_ALL="en_US"
```

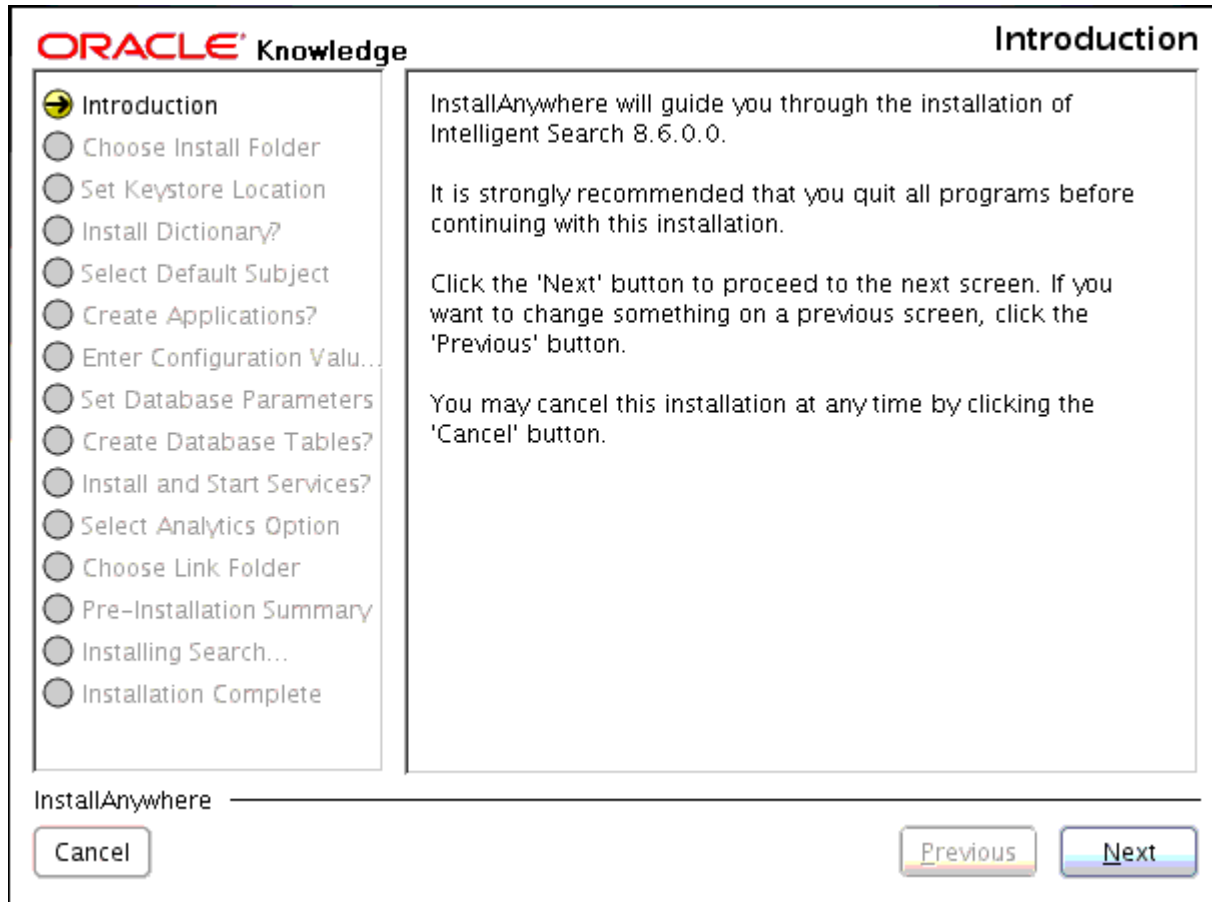
- 4 Set permissions on the binary files so that they are executable by entering:

```
chmod +x *.bin
```

- 5 Start the installer:

```
./install_search_<app_server>_<operating_system>_build_<#>.bin
```

When the initialization progress dialog completes, the installer displays the introduction screen. The Installation Introduction screen recommends that all other programs running be stopped and provides information on operating the installer.

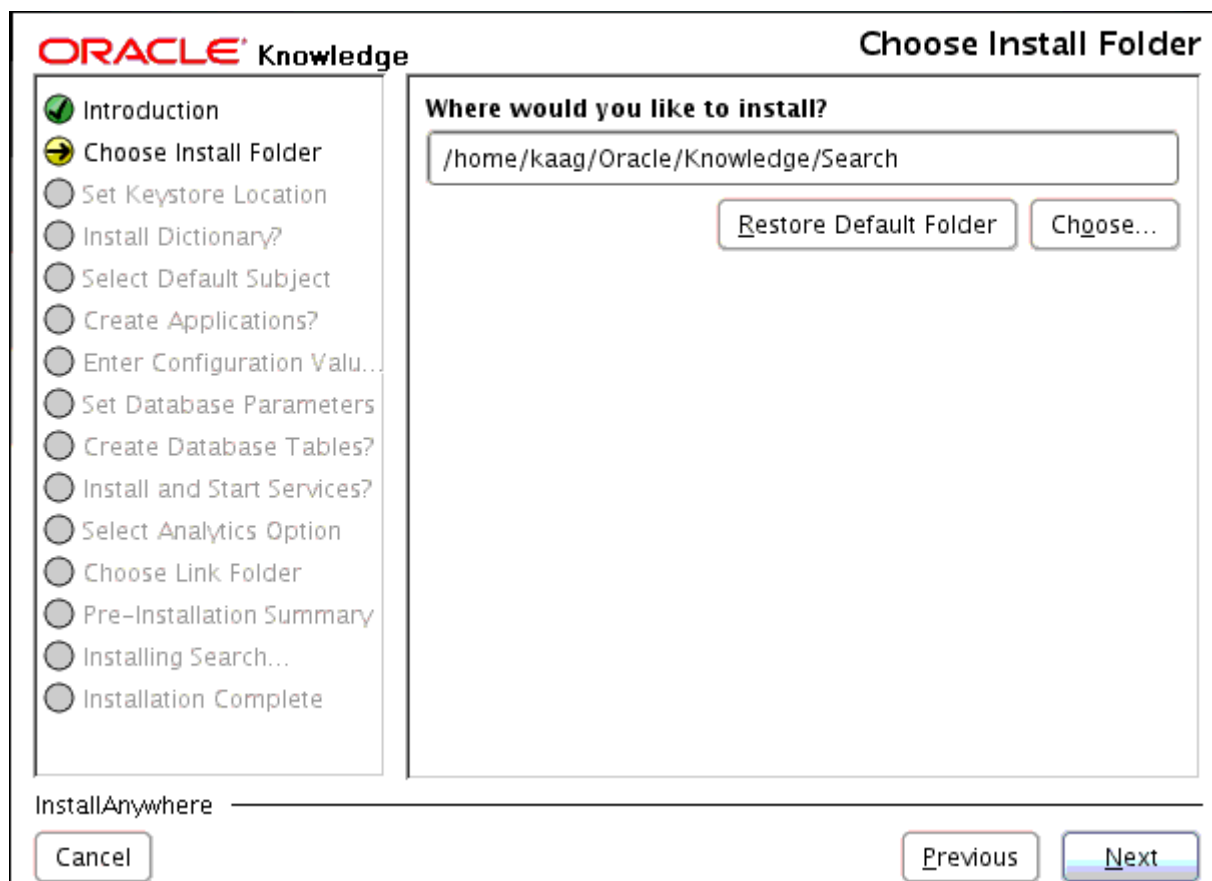


6 Select **Next** to continue.

## Choose the Installation Location

The installer prompts you to specify the installation location. Specify the location according to the following requirements:

- You cannot install Intelligent Search in a location containing an existing Intelligent Search installation or any remaining Intelligent Search files or directories from a previous installation or installation attempt.
- You must specify an installation directory name containing no blank spaces. The Common Environment does not support Oracle Knowledge installation directory names containing blank spaces. Ensure that the target file system is large enough to install the software and create your indexes.



The default Linux location is:

```
<user_home>/Oracle/Knowledge/Search
```

The default Windows location is:

```
C:\Oracle\Knowledge\Search
```

Use the **Choose** option to open a file explorer and select an alternate location.

Use the **Restore Default Folder** option to reset the default installation directory, if necessary.

Select **Next** to continue.

The installer asks you to **Create the Encryption Keystore**.

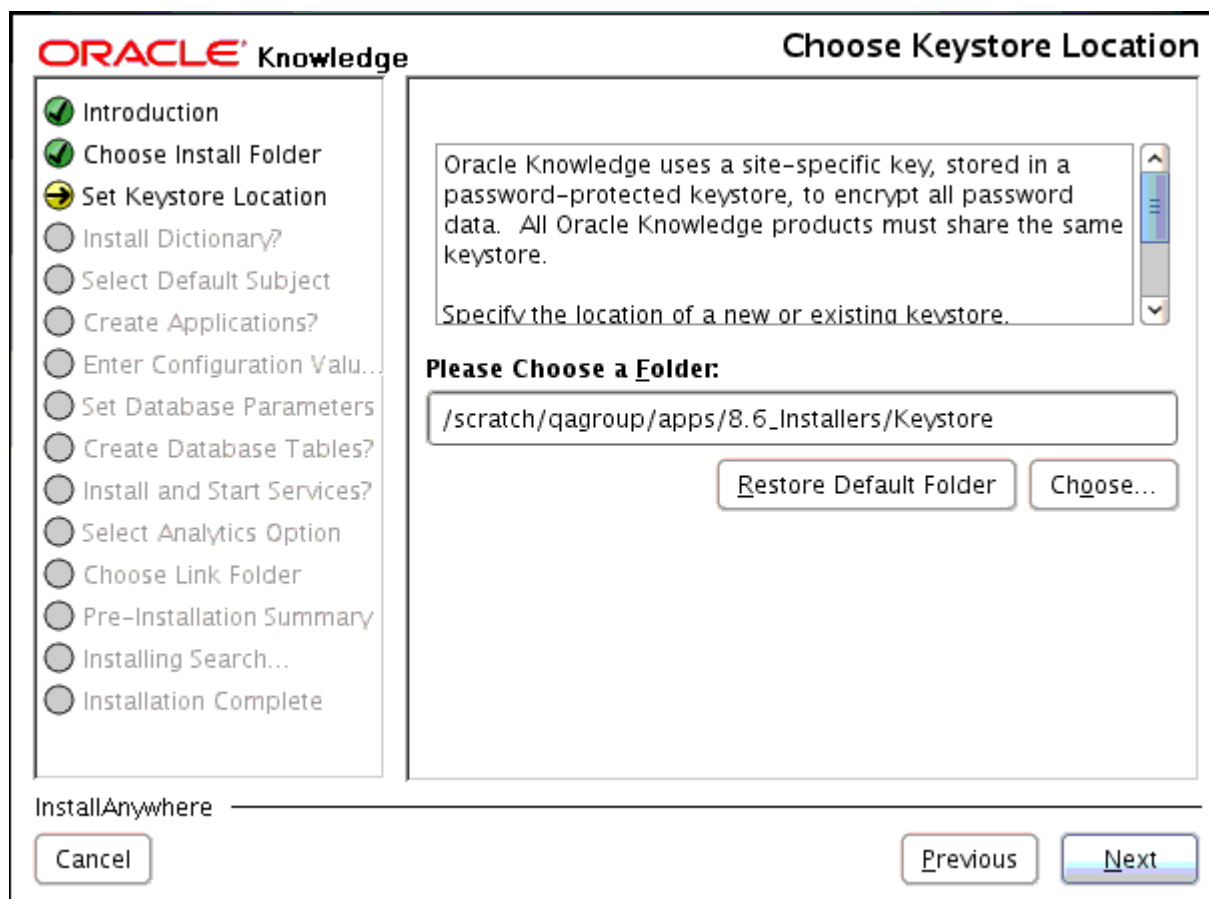
For Apache Tomcat server, the installer prompts for the installation location and java settings for Tomcat.



## Create the Encryption Keystore

The installer prompts you to specify the location of the Oracle Knowledge keystore. If you are installing Search first or without Information Manager or Analytics, create a new keystore. If you have already installed Oracle Knowledge Information Manager or Analytics, use the same keystore created during that installation by selecting the location of that keystore.

For more information about the keystore, see “Creating the Oracle Knowledge Keystore” on page 24.



You must configure a keystore that is used by all Oracle Knowledge products, as described in <xref Specifying the Oracle Knowledge Key Store in the Planning section>.

Specify one of the following:

- the location of an existing keystore that can be shared by all Oracle Knowledge products.
- the location of a new keystore that the installation program creates.

The default key store location is:

```
<INSTALL_FOLDER_PARENT>/Keystore
```

where:

<INSTALL\_FOLDER\_PARENT> is the parent folder of the top-level installation folder. For example, if you are installing in <user\_home>/Oracle/Knowledge/Search, then the installer uses the default key store location: <user\_home >/Oracle/Knowledge/Keystore.

Select **Next** to continue.

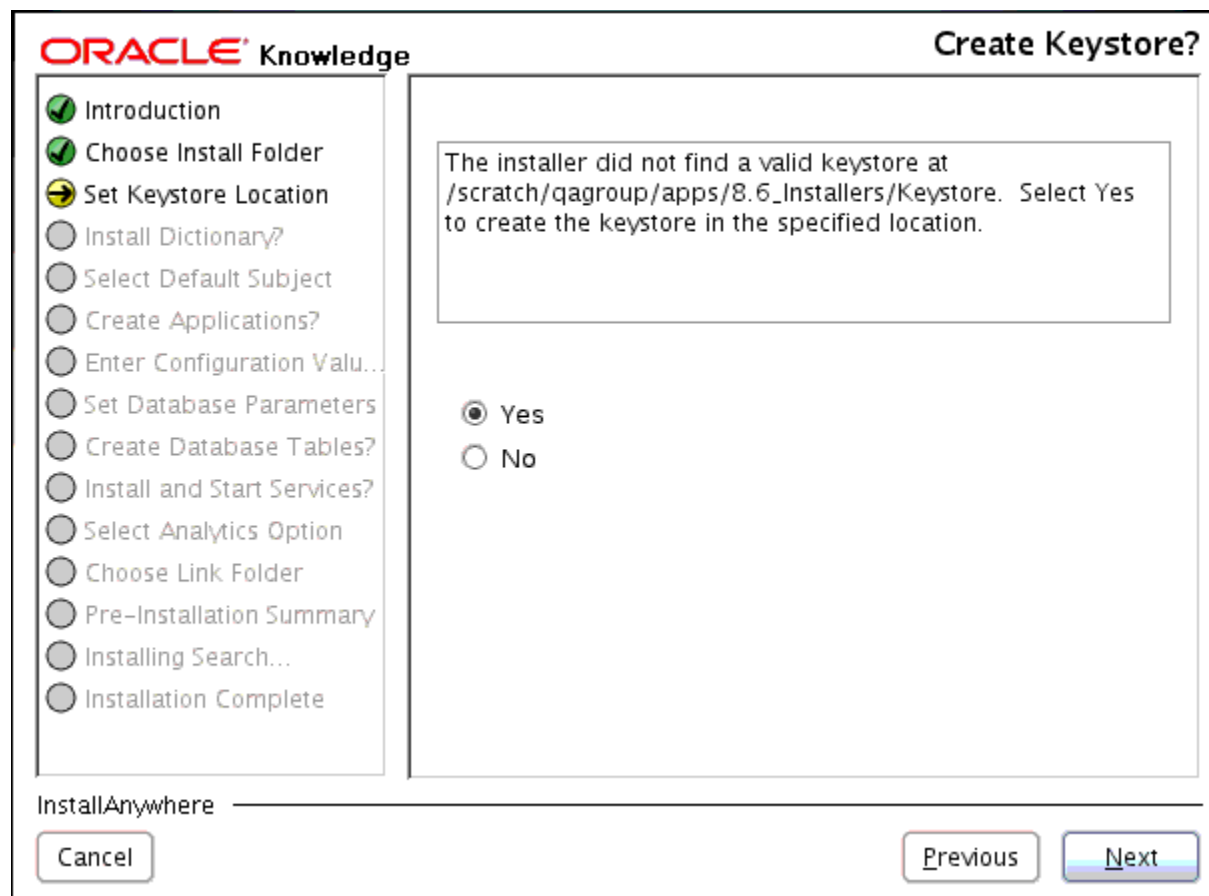
The installation program checks whether a keystore exists in the specified location.

If you specify a new keystore location, the installer prompts you to create the keystore, displaying the **Create Keystore** screen.

If you specify the location of an existing keystore, the installer uses the existing keystore files to encrypt the necessary values, as required, and displays the **Install the Dictionary** screen.

## Create Keystore

The installation program prompts you to create the keystore.



Select **Yes**.

Select **Next** to continue.

The installation program creates the keystore and prompts you to specify key store parameters, displaying the **Specifying Keystore Parameters** screen.

## Specifying Keystore Parameters

The installer prompts you to specify keystore security parameters:

If you chose to create a new keystore, the installer prompts you to specify the following parameters:

| Field             | Description                                                      |
|-------------------|------------------------------------------------------------------|
| Keystore Password | The password used to protect the keystore.                       |
| Site Name         | The unique identifier used to identify the encryption key.       |
| Key Password      | The password used to protect the encryption key in the keystore. |

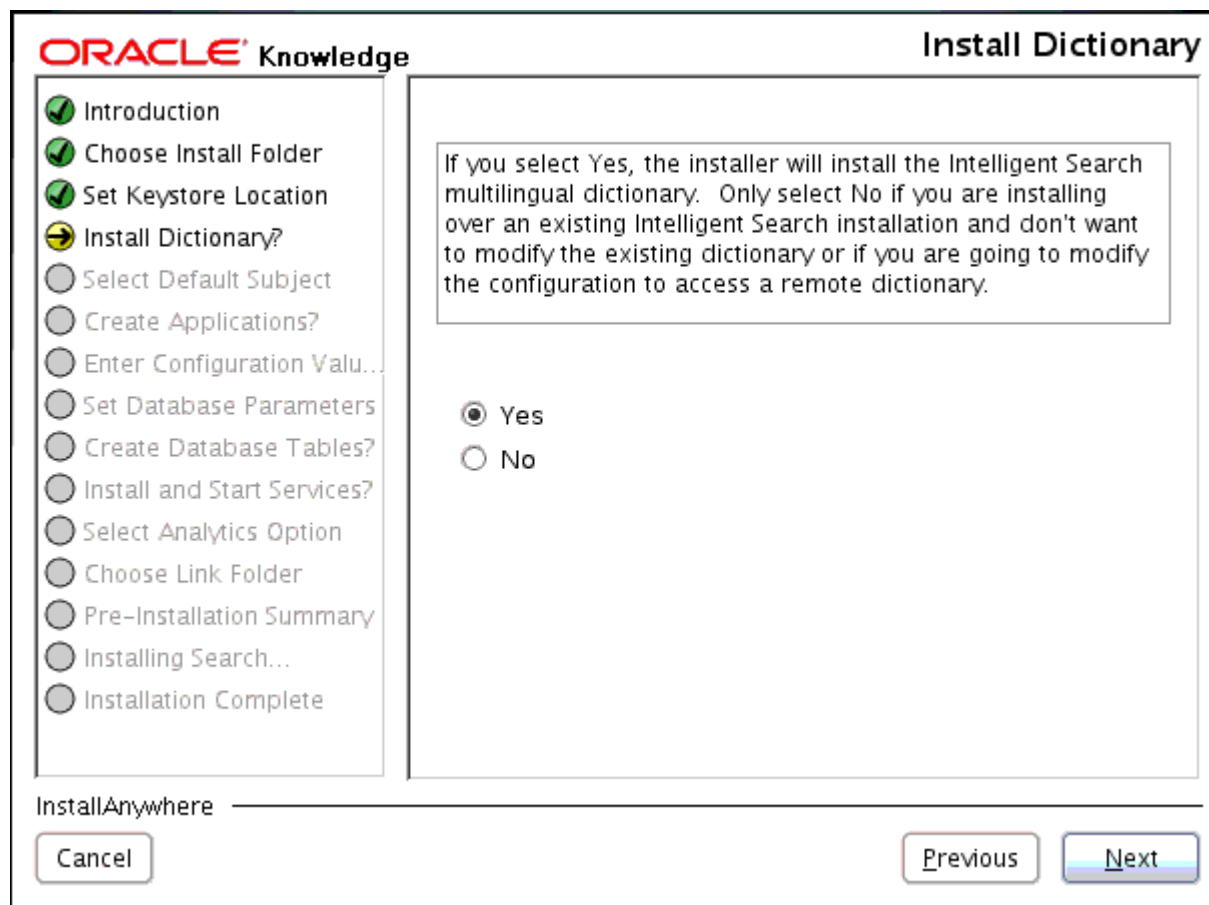
**Important!** We recommend that you record the keystore parameter values in a secure location for future reference.

Select **Next** to continue.

The installer displays the **Install the Dictionary** screen.

## Install the Dictionary

The installer prompts you to install the Dictionary. Typically, the Dictionary is installed on the Content Processing instance and then propagated to the runtime instances. The Dictionary should not be installed on remote machines by the installer.



Select **Yes** or **No**.

Select **No** only if you are:

- Installing over an existing Oracle Knowledge Installation and do not want to modify the existing Dictionary.  
or
- Intending to modify the configuration to access a remote Dictionary.

Select **Next** to continue.

The installer displays the **Select the Default Dictionary Subject Area** screen.

## Select the Default Dictionary Subject Area

The installer prompts you to select the default Dictionary subject.

The screenshot shows the 'ORACLE Knowledge' window titled 'Select Default Dictionary Subject Area'. On the left is a list of installation steps: Introduction, Choose Install Folder, Set Keystore Location, Install Dictionary?, Select Default Subject (highlighted with a yellow arrow), Create Applications?, Enter Configuration Valu..., Set Database Parameters, Create Database Tables?, Install and Start Services?, Select Analytics Option, Choose Link Folder, Pre-Installation Summary, Installing Search..., and Installation Complete. The main area contains a text box with the instruction: 'Select the default dictionary subject area to use for indexing content and processing user requests.' Below this is a list of subject areas with radio buttons: Appliances, Automotive, Computer, Customer Help (selected), Finance, Telecom, and Utilities. At the bottom, there is a 'Cancel' button, a 'Previous' button, and a 'Next' button. The 'InstallAnywhere' logo is visible in the bottom left corner.

Select the desired default Dictionary subject. The default Dictionary subject is Customer Help. The Customer Help Dictionary is included as a part of all other available Dictionaries.

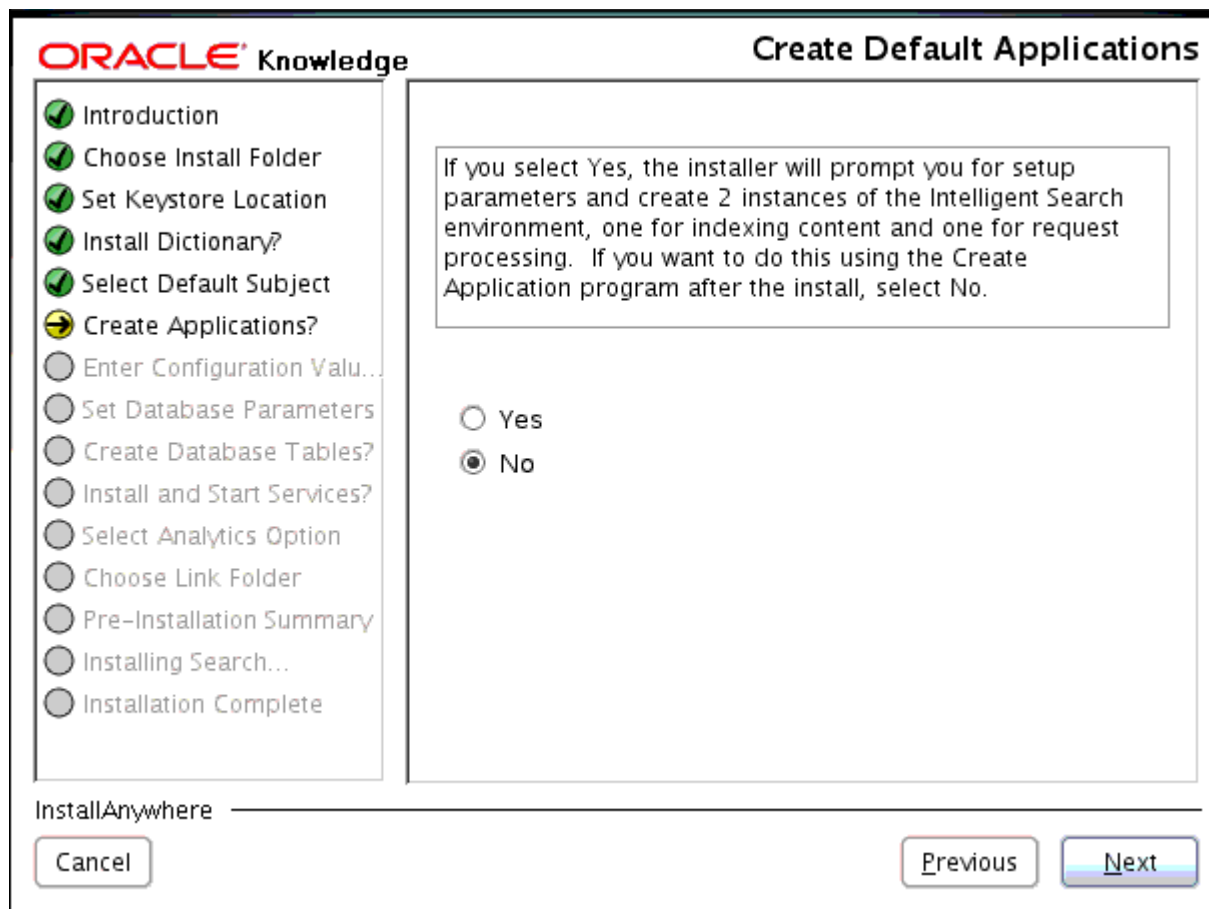
Select **Next** to continue.

The installer prompts you to **Create the Application Instance**.

## Create the Application Instance

Most customers should follow the typical installation process—where you install one or more runtime components on a separate instance using the Create Application program.

**Note:** The installer provides the option to create a consolidated installation—where both the content-processing instance and a request processing instance are installed on the local machine. This automated process is generally appropriate only for small-scale purposes such as a demonstration, and not for production installations of any type.



Select **No** to continue with a typical installation or select **Yes** for a consolidated installation.

Select **Next** to continue.

If you select **No**, the installer displays the **Specify Java Options**.

If you select **Yes**, the installer displays screens to specify parameters for a **Consolidated Installation**.

## Specify Java Options

Enter Java memory options.

**ORACLE Knowledge** **Specify Java Options**

- ☒ Introduction
- ☒ Choose Install Folder
- ☒ Set Keystore Location
- ☒ Install Dictionary?
- ☒ Select Default Subject
- ☒ Create Applications?
- ☐ Enter Configuration Values
- ☐ Set Database Parameters
- ☐ Create Database Tables?
- ☐ Install and Start Services?
- ☐ Select Analytics Option
- ☐ Choose Link Folder
- ☐ Pre-Installation Summary
- ☐ Installing Search...
- ☐ Installation Complete

**Java Home used by WebLogic (Specify the parent directory of the JDK's bin directory)**

/

Restore Default Choose...

**Memory Allocation Pool Initial Size (-Xms in Megabytes)**

2800

**Memory Allocation Pool Maximum Size (-Xmx in Megabytes)**

2800

**Maximum Permanent Generation Size (-XX:MaxPermSize in Megabytes)**

256

InstallAnywhere

Cancel Previous Next

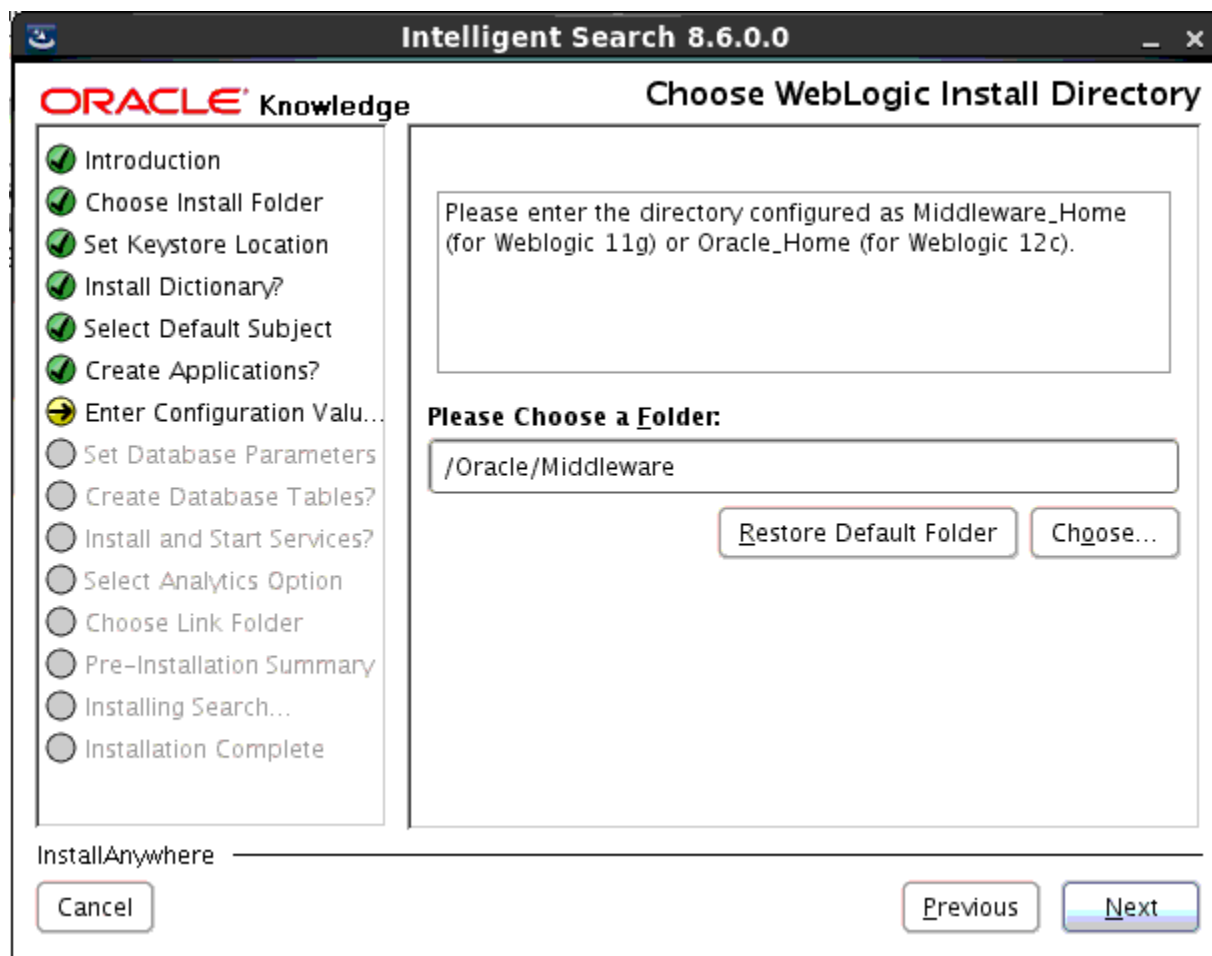
Specify the following Java parameters:

| Option                                            | Description                                                                                                              |
|---------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| Java Home used by WebLogic                        | Specify the parent directory for the JDK bin directory used by WebLogic.                                                 |
| Memory Allocation Pool Initial Size               | Specify the <code>-XmsnM</code> argument, where <i>n</i> is a number of megabytes. The default value is 1400.            |
| Memory Allocation Pool Maximum Size               | Specify the <code>-XmxnM</code> argument, where <i>n</i> is a number of megabytes. The default value is 2800.            |
| Maximum Permanent Generation Size (WebLogic only) | Specify the <code>-XX:MaxPermSize=nM</code> argument, where <i>n</i> is a number of megabytes. The default value is 256. |

Select **Next** to continue.

If you use a WebLogic application server, the installer displays the **Choose the WebLogic Middleware Home Installation Directory** screen.

## Choose the WebLogic Middleware Home Installation Directory



Select the root directory in which WebLogic Middleware is installed (for example, <weblogic\_dir>/<Middleware\_Home>)

Select **Next** to continue.

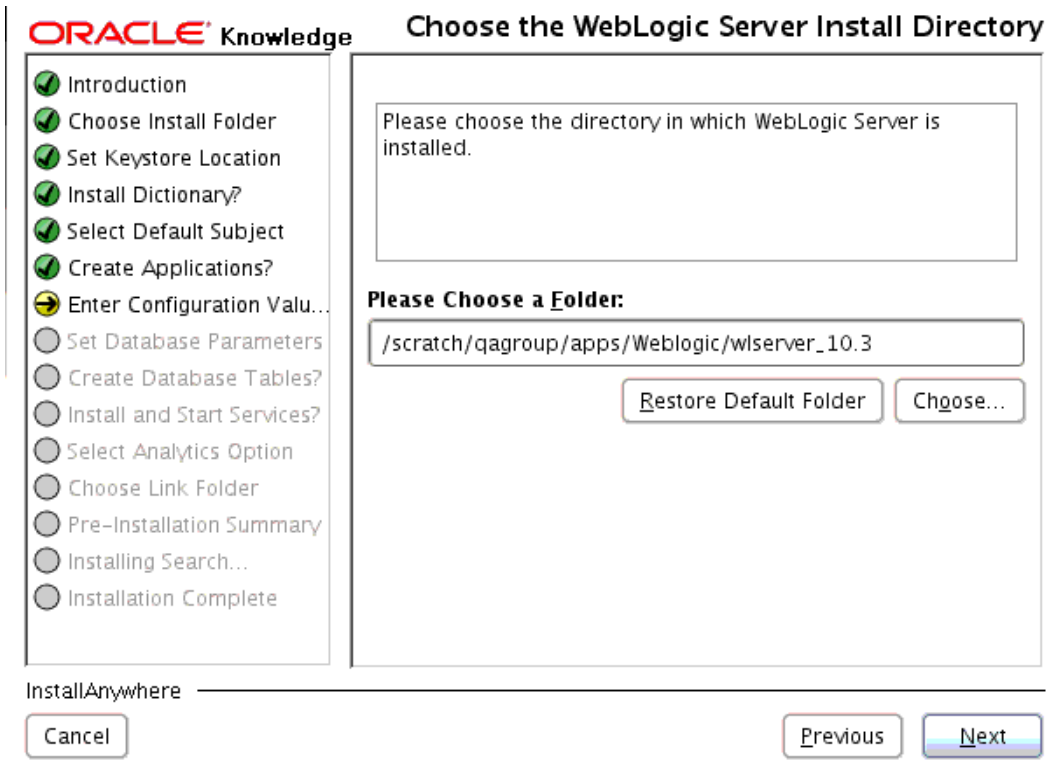
If you use a WebLogic application server, the installer displays the **Choose WebLogic Application Server Directory** screen.



## Choose WebLogic Application Server Directory

The installer prompts you to specify information about your Oracle WebLogic Server environment.

**WARNING!** Do not install Intelligent Search into an existing managed server. The application deployments require the managed server to make changes to the *server start classpath* and *arguments* before the server starts the applications.

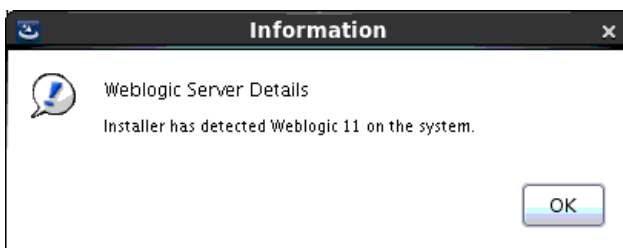


Select the root directory in which WebLogic Server is installed (for example, <weblogic\_dir>/Middleware/wlserver\_10.3).

Use the **Choose** option to open a file explorer and select an alternate location. Use the **Restore Default Folder** option to reset the default installation directory, if necessary.

Select **Next** to continue.

The installer confirms the WebLogic installation directory and displays an confirmation screen.



Select **OK** to continue.

The installer displays the **Choose a WebLogic Domain** screen.

## Choose a WebLogic Domain

Specify the name and location of your WebLogic domain to install the Oracle Knowledge Search components.

Enter the following:

| Property             | Description                                                                                                                                                                                                                               |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| WebLogic Domain Path | The full path to the WebLogic domain. The name of the WebLogic domain is added to the domains or user_projects folder under the WebLogic installation folder. For example, <weblogic_dir>/Middleware/user_projects/domains/<domain_name>. |

Select **Next** to continue.

The installer displays the **Set WebLogic Administrator Credentials** screen.

## Set WebLogic Administrator Credentials

Provide the credentials to the Administration Server of the specified WebLogic domain.

Enter the following:

| Property                    | Description                                                                                                                                                                                                                                                     |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Administrator User Name     | Specify the user name of the user used to boot the Administration Server. This user should already be created in WLS.                                                                                                                                           |
| Administrator User Password | Specify the password of the user used to boot the Administration Server.                                                                                                                                                                                        |
| Administration Server URL   | Specify the <code>&lt;protocol&gt;://&lt;listen address&gt;:&lt;listen port&gt;</code> used to connect to the Administration Server. For WebLogic, <code>&lt;protocol&gt;</code> uses <code>t3://</code> . The default port for WebLogic installations is 7001. |

Select **Next** to continue.

If you are using the consolidated installation process, the installer uses the Customer Name specified in **Specifying Instance Parameters (Consolidated Installation)** to create the following managed servers:

- `<CUSTOMER_NAME>_Server (<CUSTOMER_NAME>_Machine)`
- `<CUSTOMER_NAME>rt1_Server (<CUSTOMER_NAME>rt1_Machine)`

The installer displays the **Specify Oracle Knowledge Analytics Event Messaging** screen.

## Consolidated Installation

The following sections describe the installation screens for a consolidated installation.

### Specifying Instance Parameters (Consolidated Installation)

The Instance Configuration Parameters screen contains fields in which you specify the configuration parameters for the content processing instance and request processing instance that the installer creates.

The installer displays the Instance Configuration Parameters screen only if you specify to automatically create the application instances, as described in.

**ORACLE Knowledge** Get Instance Configuration Parameters

- Introduction
- Choose Install Folder
- Set Keystore Location
- Install Dictionary?
- Select Default Subject
- Create Applications?
- Enter Configuration Values
- Set Database Parameters
- Create Database Tables?
- Install and Start Services?
- Select Analytics Option
- Choose Link Folder
- Pre-Installation Summary
- Installing Search...
- Installation Complete

Customer name: MyCompany

Indexing -- host name: slc01oot.us.oracle.cc

Indexing -- transport port #: 9000

Indexing -- gateway port #: 8222

Request Processing -- host name: slc01oot.us.oracle.cc

Request Processing -- transport port #: 9002

Request Processing -- gateway port #: 8223

InstallAnywhere

Cancel Previous Next

Specify the following instance parameters:

| Parameter                         | Description                                                                                                                                                                                                                                                                                                       |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Customer name</b>              | Specify the name of the default instance. The application creation process uses this name for the instance directory within the Oracle Knowledge directory structure. This name is also used as the prefix for the runtime instance. Specify a descriptive name, using no blank spaces within the directory name. |
| <b>Indexing -- host name</b>      | Specify the host name for the default indexing instance. The default is localhost.                                                                                                                                                                                                                                |
| <b>Indexing -- transport port</b> | Specify the port for the default instance. The default is 9000.                                                                                                                                                                                                                                                   |
| <b>Indexing -- gateway port</b>   | Specify the port that the application server uses. The default is 8222.                                                                                                                                                                                                                                           |

| Parameter (Continued)                       | Description (Continued)                                                                                      |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| <b>Request Processing -- host name</b>      | Specify the host name for the request processing (runtime) instance. The default is <code>localhost</code> . |
| <b>Request Processing -- transport port</b> | Specify the port for the request processing (runtime) instance. The default is 9002.                         |
| <b>Request Processing -- gateway port</b>   | Specify the port for the request processing (runtime) instance Web application. The default is 8223.         |

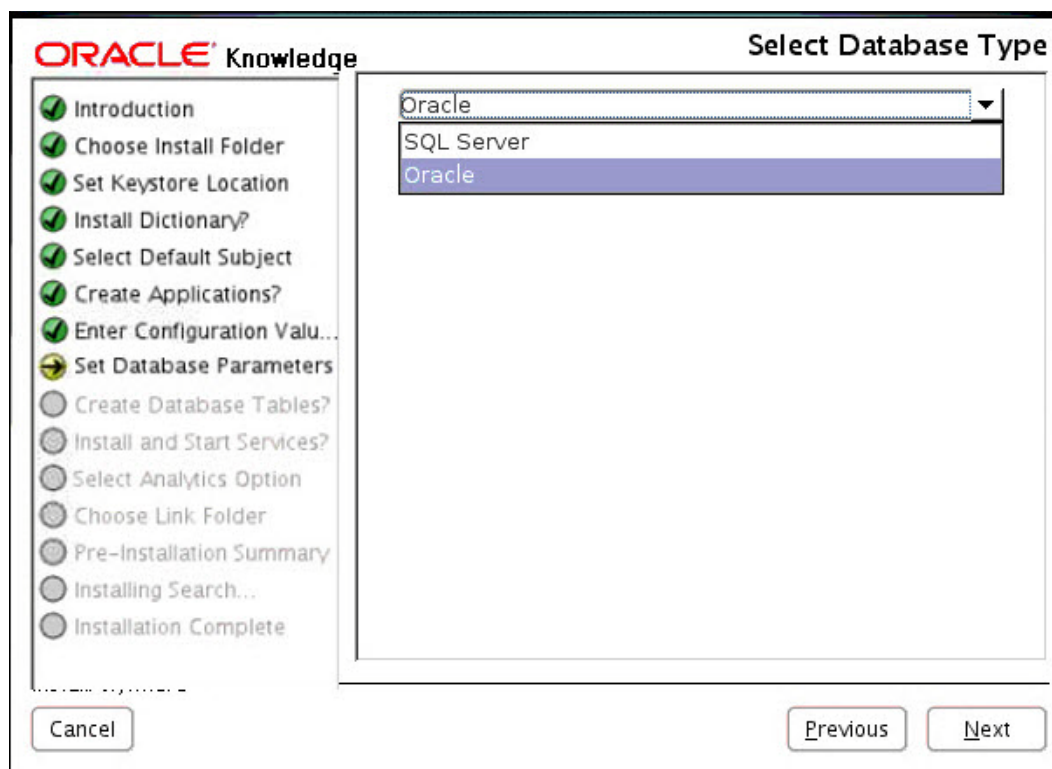
Select **Next** to continue.

The **Setting Database Tables (Consolidated Installation)** screen displays.

## Setting Database Tables (Consolidated Installation)

If you elect to create the application instances using the installer, the installer presents options to configure the database connection and to create the Content Store and Quality Monitor tables.

The Set Database Parameters screen allows you to set your database connection parameters. The database users must already be created in order for the user validation to complete successfully.



Select your Database type: **Oracle** or **SQL Server**.

Select **Next** to continue.

The installer displays the **Setting Database Parameters (Consolidated Installation)** screen.

## Setting Database Parameters (Consolidated Installation)

Enter the database connection parameters

**ORACLE Knowledge** **Set Database Parameters**

- Introduction
- Choose Install Folder
- Set Keystore Location
- Install Dictionary?
- Select Default Subject
- Create Applications?
- Enter Configuration Valu...
- Set Database Parameters**
- Create Database Tables?
- Install and Start Services?
- Select Analytics Option
- Choose Link Folder
- Pre-Installation Summary
- Installing Search...
- Installation Complete

**Database JDBC URL**  
jdbc:oracle:thin:@slc01hfp.us.oracle.com:1521:ORCL

**Database User**  
search86demo

**Database Password**  
\*\*\*\*\*

**Re-enter Database Password**  
\*\*\*\*\*

InstallAnywhere

Cancel Previous Next

Enter the following parameters:

| Parameter                          | Description                                               |
|------------------------------------|-----------------------------------------------------------|
| Database JDBC URL                  | The JDBS URL used to connect to the database.             |
| Database User                      | The user name the system uses to connect to the database. |
| Database Password                  | The password associated with the user name above.         |
| Database Name<br>(SQL Server ONLY) | Enter the name of the database.                           |

Select **Next** to continue.

The installer displays the **Creating Database Tables (Consolidated Installation)** screen.

## Creating Database Tables (Consolidated Installation)

The Create Content Store Table screen allows you the option to have the installer create the Content Store database schema. The default is **No**. We recommend that you select **Yes**.

The screenshot shows the 'Create Content Store Tables?' dialog box. On the left is a vertical list of installation steps, each with a circular icon: Introduction, Choose Install Folder, Set Keystore Location, Install Dictionary?, Select Default Subject, Create Applications?, Enter Configuration Valu..., Set Database Parameters (highlighted with a yellow arrow), Create Database Tables?, Install and Start Services?, Select Analytics Option, Choose Link Folder, Pre-Installation Summary, Installing Search..., and Installation Complete. The main area of the dialog contains the question 'Do you want the installer to create the Content Store database schema?' followed by two radio buttons: 'Yes' and 'No'. The 'No' radio button is selected. At the bottom of the dialog, there is a 'Cancel' button on the left and 'Previous' and 'Next' buttons on the right. The title bar of the dialog reads 'ORACLE Knowledge Create Content Store Tables?'.

Select **Yes**.

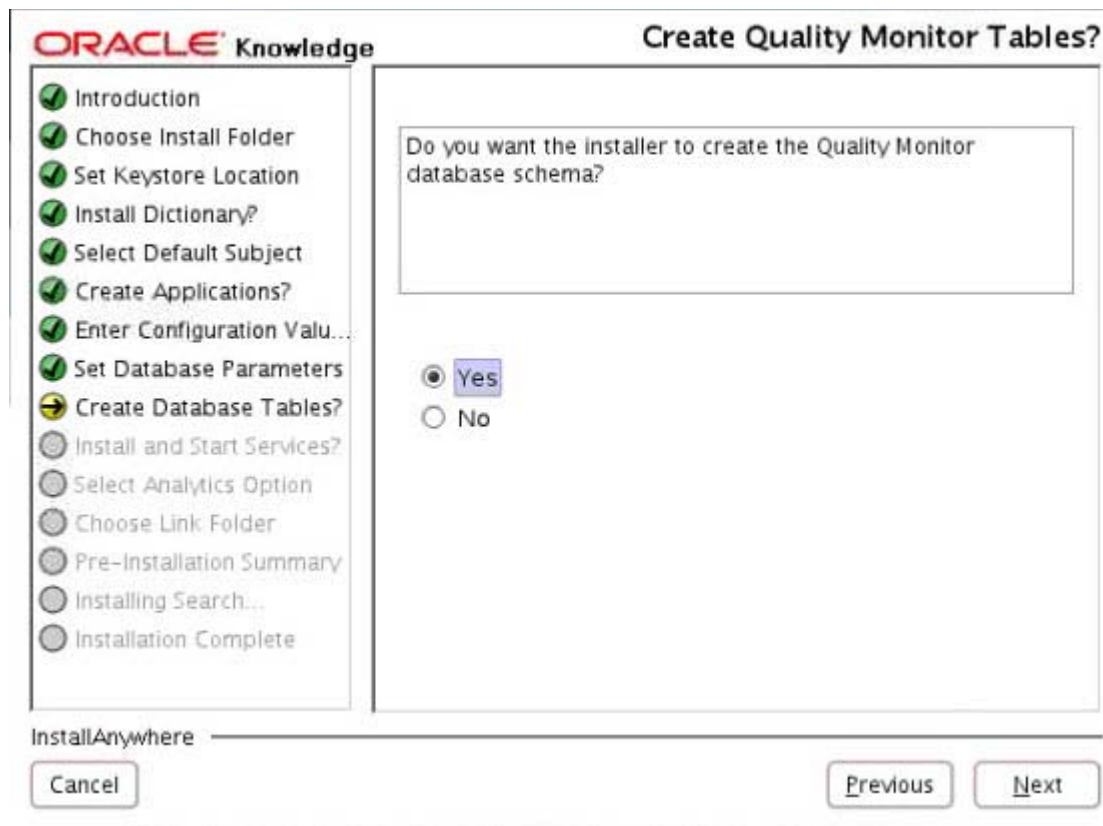
Select **Next** to continue.

The installer displays the **Creating Quality Monitor Tables (Consolidated Installation)** screen.

## Creating Quality Monitor Tables (Consolidated Installation)

The Create Quality Monitor Tables screen displays.

The Create Quality Monitor Tables screen allows you the option to have the installer create the Quality Monitor Tables database schema. The default is **No**. We recommend that you select **Yes**.



Select **Yes**.

Select **Next** to continue.

On Windows, the installer displays the **Installing and Starting Oracle Knowledge Services (Consolidated Installation)** screens.

On Linux, the installer displays the **Specify Java Options** screen.

## Installing and Starting Oracle Knowledge Services (Consolidated Installation)

Select whether or not to install and start Oracle Knowledge services.

Select **Yes** to install and start services; select **No** to manually install services following the installation.

If you use WebLogic Server, the installer displays the **Specify Java Options** screens.

If you use Apache Tomcat Server; the installer displays the **Specify Oracle Knowledge Analytics Event Messaging** screen.



## Specify Oracle Knowledge Analytics Event Messaging

The installer prompts you to activate logging for Oracle Knowledge Analytics.

Specify the configuration parameters to the instance of WebLogic where the Analytics event listener is running and monitoring the JMS queue. These values can be updated after the installation of Search or Analytics is completed, if necessary, by editing the `<search_install_home>/config/ok_jms.properties` file.

**Note:** In high-volume environments, multiple JMS queues might already exist. Make sure that you are configuring the correct JMS queue or event listener.

**ORACLE Knowledge** **Select Activate Analytics logging**

- ☒ Introduction
- ☒ Choose Install Folder
- ☒ Set Keystore Location
- ☒ Install Dictionary?
- ☒ Select Default Subject
- ☒ Create Applications?
- ☒ Enter Configuration Valu...
- ☒ Set Database Parameters
- ☒ Create Database Tables?
- ☒ Install and Start Services?
- ☒ **Select Analytics Option**
- ☐ Choose Link Folder
- ☐ Pre-Installation Summary
- ☐ Installing Search...
- ☐ Installation Complete

Do you want to activate analytics logging?

☒ Yes
☐ No

InstallAnywhere

Cancel
Previous
Next

Select **Yes** or **No**.

Select **Next** to continue.

If you select **Yes**, the installer prompts you to specify JMS queue parameters so that Intelligent Search application data is available for use by a configured Oracle Knowledge Analytics application and displays the **Configure the JMS Queue for Oracle Knowledge Analytics Logging** screen.

If you select **No**, the Intelligent Search application is not configured to send data to an Analytics application using the JMS queue. The Analytics support files are installed, but Analytics logging is inactivated. The installer displays the **Choose Shortcut Folder (Windows)** screen or the **Pre-installation Summary** screen on Linux.

## Configure the JMS Queue for Oracle Knowledge Analytics Logging

Configure the JMS queue for Search events to be accessed by Analytics. The installer prompts you for the following JMS queue values:

| Value            | Description                                                                                                                                                                                                              |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JMS Queue URL    | Specify the WebLogic Server (WLS) domain that is serving the queue.<br>For example: <code>t3://&lt;listen address&gt;:&lt;listen port&gt;</code><br><b>Note:</b> The URL must contain the host name of the queue server. |
| JMS Queue User   | Specify the user ID for the WebLogic console/domain where the queue is configured.                                                                                                                                       |
| JMS Password     | Specify the password for the WebLogic console/domain where the queue is configured.                                                                                                                                      |
| JMS Factory Name | Specify a JMS factory name or use the default name:<br><code>jms/AnalyticsConnectionFactory</code> .                                                                                                                     |
| JMS Queue Name   | Specify a JMS factory name or use the default name: <code>jms/AnalyticsQueue</code>                                                                                                                                      |

Select **Next** to continue.

The installer displays the **Choose Shortcut Folder (Windows)** screen or the **Pre-installation Summary** screen on Linux.

### Choose Shortcut Folder (Windows)

Select the location in which you want to create shortcuts or links to Oracle Knowledge. If the installer locates an existing Oracle Knowledge program group on Windows, then it uses that group as the default. If the installer does not locate an existing Oracle Knowledge program group, then it creates a new program group. On Windows, you can specify:

- To create an alternate new program group in which the shortcuts are created
- To create Oracle Knowledge icons in another location which you specify
- To create shortcuts in an alternate existing program group
- To create icons for All Users
- To place Oracle Knowledge icons **In the Start Menu, On the Desktop, or In the Quick Launch Bar**
- To not create Oracle Knowledge icons

Select the desired product icon locations.

Select **Next** to continue.

The installer displays the **Pre-installation Summary** screen.

## Pre-installation Summary

The Pre-Installation Summary screen displays.

**ORACLE Knowledge** Pre-Installation Summary

☒ Introduction  
☒ Choose Install Folder  
☒ Set Keystore Location  
☒ Install Dictionary?  
☒ Select Default Subject  
☒ Create Applications?  
☒ Enter Configuration Valu...  
☒ Set Database Parameters  
☒ Create Database Tables?  
☒ Install and Start Services?  
☒ Select Analytics Option  
☒ Choose Link Folder  
☒ Pre-Installation Summary  
☐ Installing Search...  
☐ Installation Complete

**Please Review the Following Before Continuing:**

**Product Name:**  
Intelligent Search 8.6.0.0

**Install Folder:**  
/scratch/qagroup/apps/8.6\_Installers/Search

**Link Folder:**  
/home/kaag

**Install Dictionary?**  
Yes

**Default Dictionary Subject Area**  
Customerhelp

**Create Application Instances?**  
No

**Create Content Store Tables?**

InstallAnywhere

Cancel Previous Install

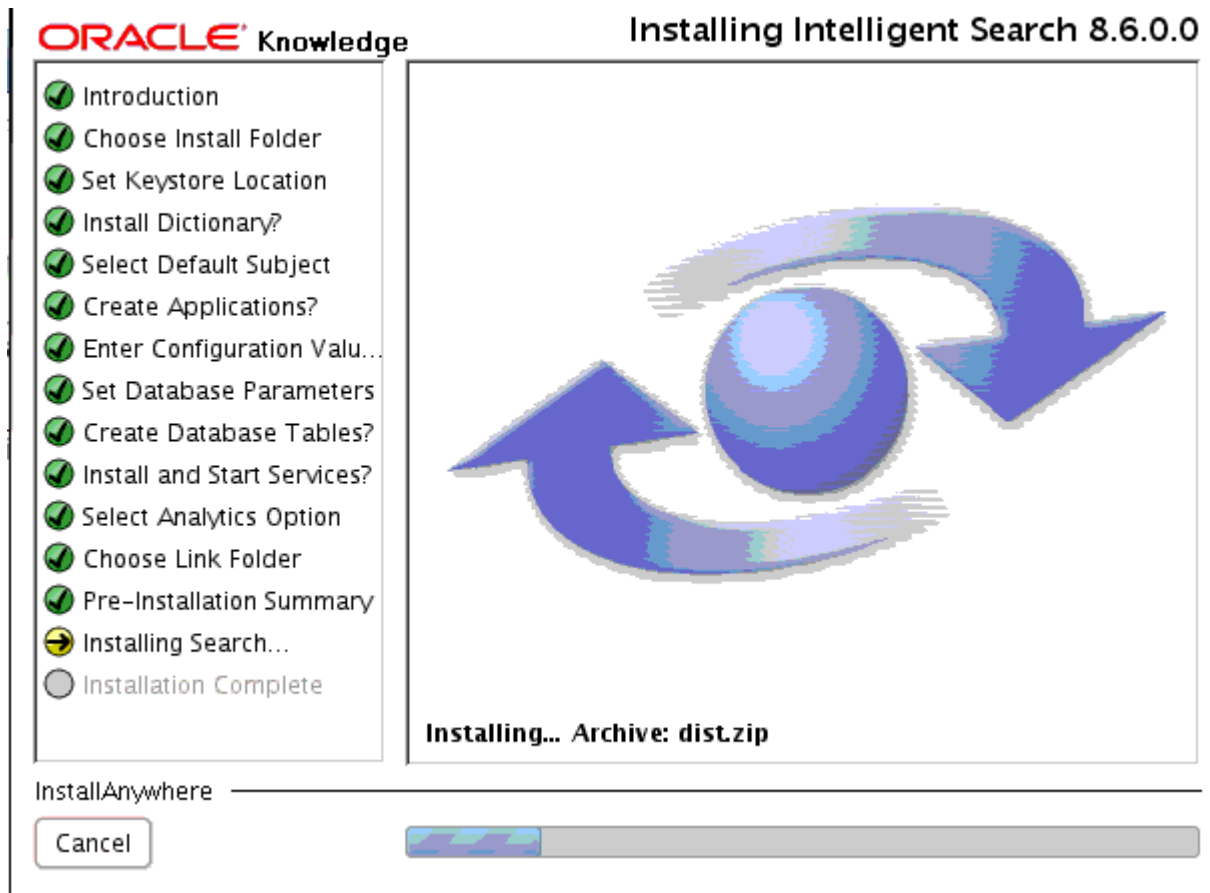
Review the preinstallation summary and make any necessary changes by selecting **Previous**.

Select **Install** to continue.

The installer displays a progress screen.

## Installing the Product Files

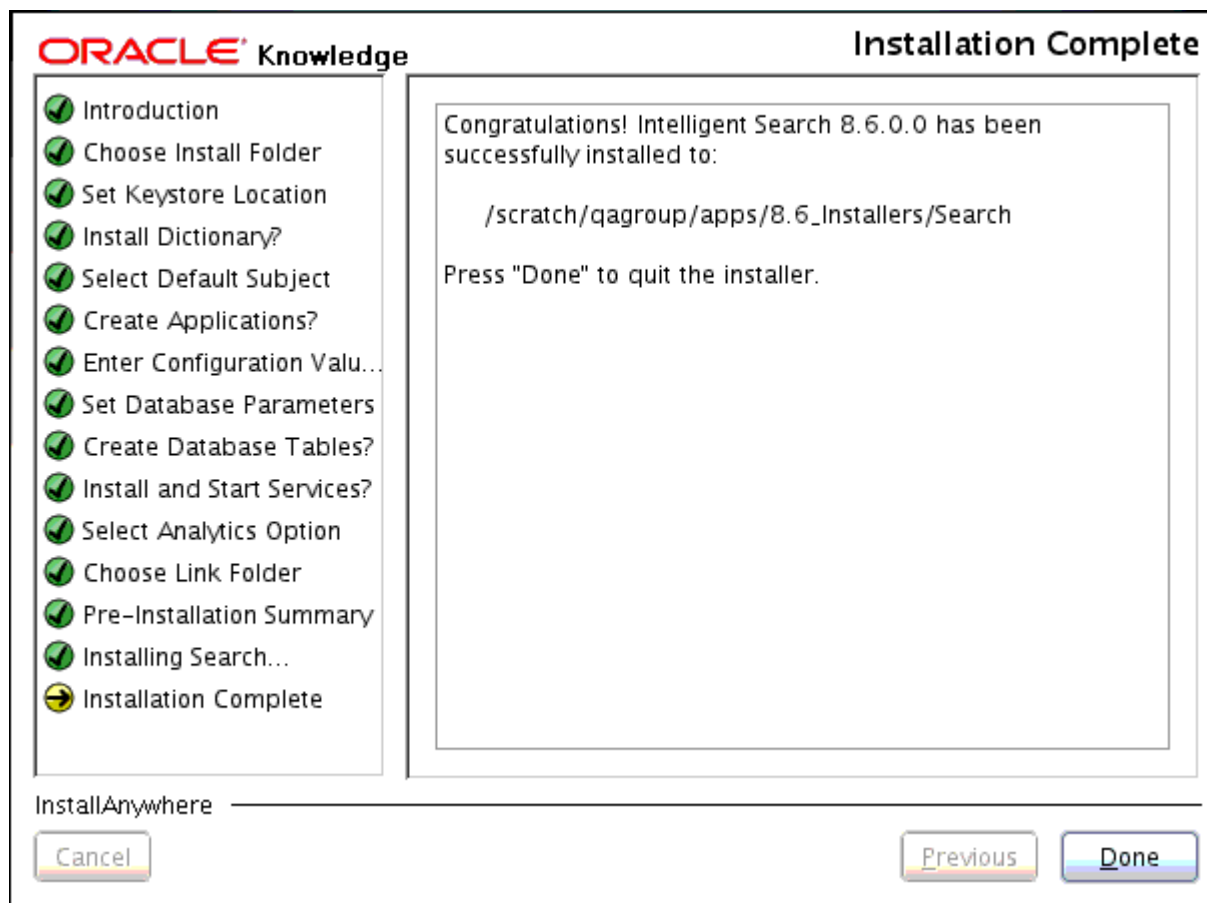
The installer displays a progress screen during installation.



When the installation is complete, the installer displays the **Installation Complete** screen.

## Installation Complete

Intelligent Search is now installed in the specified location.



Select **Done** to exit the installer.

The installer executes its cleanup routines and terminates.

## Restart the WebLogic Node Manager

If you chose Yes when asked if you wanted to **Create the Application Instance**, you must restart the WebLogic Node Manager.

This is required because changes are made to the Node Manager configuration during installation and instance configuration that cannot take effect until the Node Manager is restarted. It must be restarted before the Managed Server for the Search instance can be started through the WebLogic Administration Console.

For additional WebLogic information, see "Start Oracle Knowledge on WebLogic Server" on page 38.

## WebLogic Start-up Script

You can use a WebLogic start-up script to start the managed server. The `startManagedWeblogic.sh` | `cmd` script is provided to allow WebLogic users the ability to monitor the

managed servers within Oracle Process Manager and Notification Server (OPMN) or some other monitoring service not provided with Oracle Knowledge.

To generate the start-up script:

- 1 Open a command prompt and cd into `$Oracle Knowledge_ROOT/instances/<Instance_Name>`, where `<Instance_Name>` refers to the Search instance name on this installation.
- 2 On Windows, execute `setenv.bat` to open the Common Environment. On Linux, execute `createStartupScript.sh`. On Windows, execute `createStartupScript`.  
The WebLogic start managed server script is generated to `$Oracle Knowledge_ROOT/instances/<Instance_Name>`. On Linux, the script is `startManagedWebLogic.sh`. On Windows, the script is `startManagedWebLogic.cmd`. Execute the script outside of the Common Environment to start the managed server.

## Configuring Application Remote Clients and Data Stores

**Important!** For a typical installation, you must complete the following post-installation configuration tasks. For a consolidated installation, you only need to complete steps 1 and 2 below.

You must complete the following steps:

- 1 Start the Oracle Knowledge Service.
- 2 Start the Common Environment.
- 3 Create a content processing instance.
- 4 Prepare the remote servers for search software installation.
- 5 Create remote content processing (workclient) instances on designated machines in the environment.
- 6 Create remote request processing (runtime) instances on designated machines in the environment.
- 7 Configure the application data stores.
- 8 Create the application database tables.
- 9 Restart the application.

## Start Intelligent Search from the WebLogic Administration Console

To start Oracle Knowledge Search from the WebLogic Administration Console, see the instructions in “Start Oracle Knowledge on WebLogic Server” on page 38

You can now access the System Manager application, as described in “Accessing System Manager” on page 78.

## Start the Oracle Knowledge Service for Intelligent Search

You can start the Oracle Knowledge service either from the Common Environment command prompt if you use Apache Tomcat server, or the WebLogic Administration Console for WebLogic server. On Windows, you must first install the service. To start the Oracle Knowledge service on the Apache Tomcat server, see “Start the Common Environment” on page 68.

The following table provides an overview of the steps necessary to start the Oracle Knowledge service on WebLogic, depending upon your environment.

| <b>If your environment is...</b>                   | <b>Complete the following steps...</b>                                                                                    |
|----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| Typical installation on Linux with WebLogic        | Start the Oracle Knowledge Service as described in “Starting the Oracle Knowledge Intelligent Search Service” on page 67. |
| Consolidated installation on Linux with Weblogic   | Start the Oracle Knowledge Service as described in “Starting the Oracle Knowledge Intelligent Search Service” on page 67. |
| Typical installation on Windows with WebLogic      | Start the Oracle Knowledge Service as described in “Starting the Oracle Knowledge Intelligent Search Service” on page 67. |
| Consolidated installation on Windows with Weblogic | Start the Oracle Knowledge Service as described in “Starting the Oracle Knowledge Intelligent Search Service” on page 67. |

## Installing the Oracle Knowledge Service (Windows)

To install the Oracle Knowledge service:

Enter the following command at the Common Environment prompt:

```
inquiraservice -install
```

On Windows 2008, to install, uninstall, stop, and start Oracle Knowledge services, you must execute the Common Environment window using the Run as Administrator option.

The Common Environment console displays information about the service installation process.

You must uninstall and reinstall the service any time you change the JVM options (JAVA\_OPTS) in the Common Environment.

After installing the Oracle Knowledge service you must start the Oracle Knowledge service see “Start the Common Environment” on page 68 and then “Configuring the Application Data Stores” on page 79.

## Uninstalling the Oracle Knowledge Service (Windows)

To uninstall the Oracle Knowledge service:

Enter the following command at the Common Environment prompt:

```
inquiraservice -uninstall
```

On Windows 2008, to install, uninstall, stop, and start Oracle Knowledge services, you must execute the Common Environment window using the Run as Administrator option.

You must uninstall and reinstall the service any time you change the JVM options (JAVA\_OPTS) in the Common Environment.

After uninstalling the Oracle Knowledge service you must reinstall the Oracle Knowledge service see “Installing the Oracle Knowledge Service (Windows)” on page 67.

## Starting the Oracle Knowledge Intelligent Search Service

This must be done for both the content processing instance and the runtime instance.

You start the Oracle Knowledge service from the Common Environment command prompt for the related instance.

Starting Search from ICE:

- 1 Open a command prompt and cd into `<search_install_home>/instances/<Instance_Name>`, where `Instance_Name` refers to the Search instance name on this installation.
- 2 On Linux, execute `setenv.sh` to open the Common Environment.  
On Windows, execute `setenv.bat` to open the Common Environment.
- 3 On Linux, enter `inquira.sh start`, to start the Oracle Knowledge service.  
On Windows, enter `inquira start`, to start the Oracle Knowledge service.

**Note:** On Windows 2008, to install, uninstall, stop, and start Oracle Knowledge services, you must execute the Common Environment window using the **Run as Administrator** option.

The Oracle Knowledge service starts.

You can use the command `inquira.sh stop` to stop the service on Linux or `inquira stop` to stop the service on Windows.

The Intelligent Search managed servers can also be started and stopped from the WebLogic Management Console. See “Start Oracle Knowledge on WebLogic Server” on page 38 for more information.

## Restart the Application Instance

You must restart the Oracle Knowledge application instance to make any configuration changes available to the applications.

To restart the Oracle Knowledge application, enter the following command from the Common Environment:

On Linux:

```
inquira.sh restart
```

On Windows:

```
inquira restart
```

**Note:** The commands `inquira.sh restart` and `inquira restart` can only be executed successfully when the application is started by executing the `inquira.sh start` and `inquira start` commands.

The Search service can also be stopped and restarted using the WebLogic Administration Console. For more information, see “Start Oracle Knowledge on WebLogic Server” on page 38.

## Start the Common Environment

When you create the Oracle Knowledge application, the Create Application program places Common Environment items in the Microsoft Windows Start menu for each defined instance. There are no menu items set up for Linux based installations. The Common Environment is used to perform the remaining tasks.

To start the Common Environment:

On Linux, open a terminal window and type:

```
<install_root>/instances/<Content_Processing_Instance_Name>/  
enter ./setenv.sh
```



On Windows, open a terminal window and type:

```
<install_root>/instances/<Content_Processing_Instance_Name>/
enter setenv.bat
```

The first time the Common Environment is accessed it may be necessary to build and deploy the web applications that were selected during installation. This is accomplished by following the prompts on the screen.

**Note:** This process is also used when a patch is applied.

Building the web application creates the WAR file (`inquirawb` or `inquiragw`) and adds in any patches or updated `.jar` files.

Deploying the web application copies the new WAR file to the application server container deployment folder and initiates the deployment process automatically.

## Manage Intelligent Search from the Common Environment

You can manage the Intelligent Search application using the following Common Environment commands. You can access this environment from a Common Environment shortcut that is installed as part of the standard and stand-alone installation processes.

| Command                                 | Description                                         |
|-----------------------------------------|-----------------------------------------------------|
| <code>inquire.sh start</code> (Linux)   | Starts the Intelligent Search services.             |
| <code>inquire start</code> (Windows)    |                                                     |
| <code>inquire.sh stop</code> (Linux)    | Stops the Intelligent Search services.              |
| <code>inquire stop</code> (Windows)     |                                                     |
| <code>inquire.sh restart</code> (Linux) | Stops and restarts the Intelligent Search services. |
| <code>inquire restart</code> (Windows)  |                                                     |

**Note:** The commands `inquire.sh/inquire restart` and `inquire.sh/inquire stop` can only be executed successfully when the application is started by executing the `inquire.sh start` and `inquire start` commands.

## Create a Content Processing Instance

On your local server, start the Create Application program by executing the following command from the Common Environment:

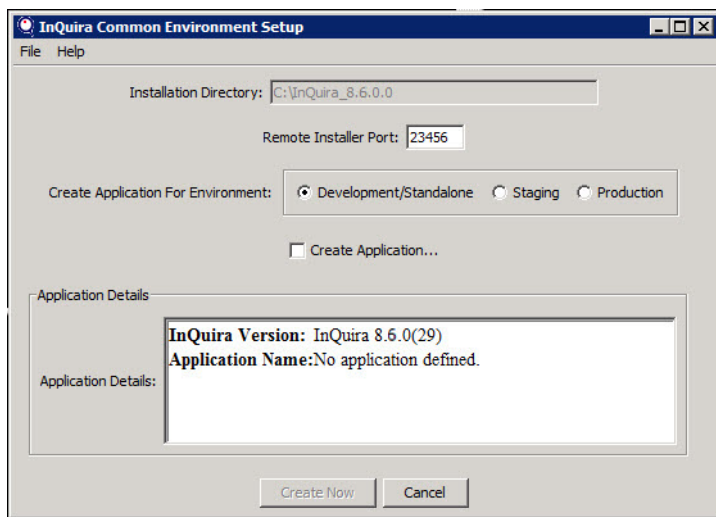
Linux:

```
<install_root>/bin/createApp.sh
```

Windows:

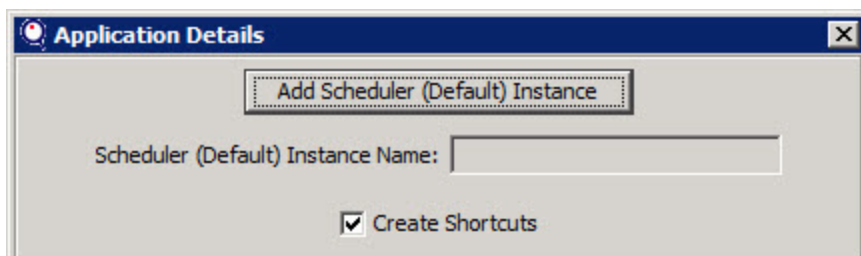
Use the shortcut in the Start menu or, in the Common Environment, run `createApp.bat`.

The Common Environment Create Application console opens, and the Common Environment Setup dialog displays.



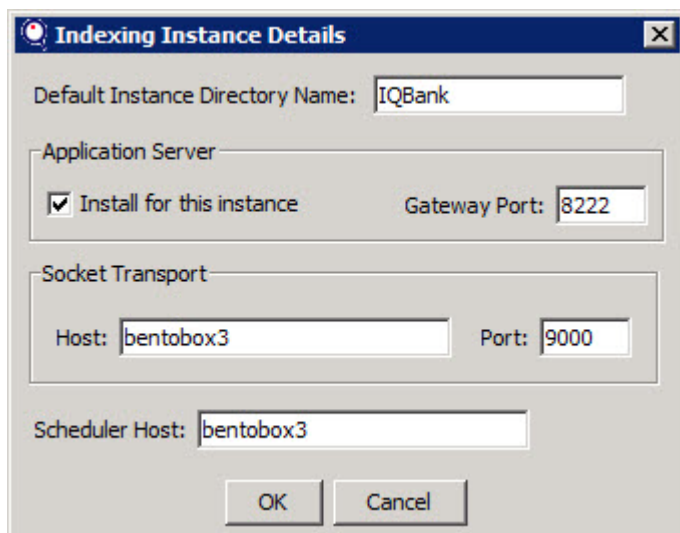
Perform the following steps to create a Content Processing instance on the local machine:

- 1 Select the appropriate environment.
- 2 Select **Create Application....**



- 3 Click **Add Scheduler (Default) Instance** in the new dialog window.

The Indexing Instance dialog box displays the following:



- 4 Provide a name for the instance in this environment.
- 5 Verify the values entered by default, click **OK**
- 6 Click **Create Configuration**.

Review the confirmation screen and save your changes to create the content processing instance. When you have finished creating the content processing instance:

- 1 Return to the Common Environment command line prompt.
- 2 While in the same Common Environment command Window used to create the Scheduler/Indexer instance, run the `initNavigation.{bat,sh}` script, which generates the default taxonomy for the site.
- 3 Then, follow the instructions to build the web app (`buildWebApp`) and to deploy it (`deployApp`).

## Prepare Remote Servers for Search Software Installation

Prior to installing Search on remote servers - it is necessary to prepare the remote servers for search installation. To prepare the remote servers run the Search installer but DO NOT elect to install a Dictionary or the web applications (content processing instance or search runtimes). The installer provides the required software to communicate with the `createApp` utility.

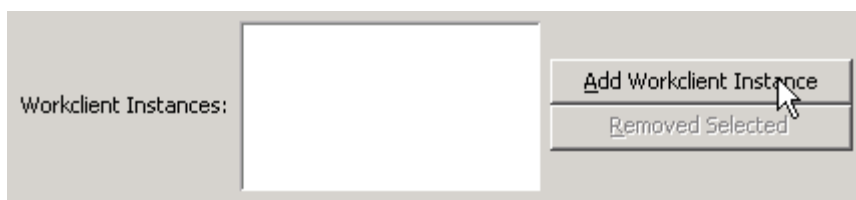
On Linux, use the remote machine(s) ICE window to execute `remoteInstaller.sh`.

On Windows, use the remote machine(s) ICE window to execute `remoteInstaller` or `remoteInstaller.bat`.

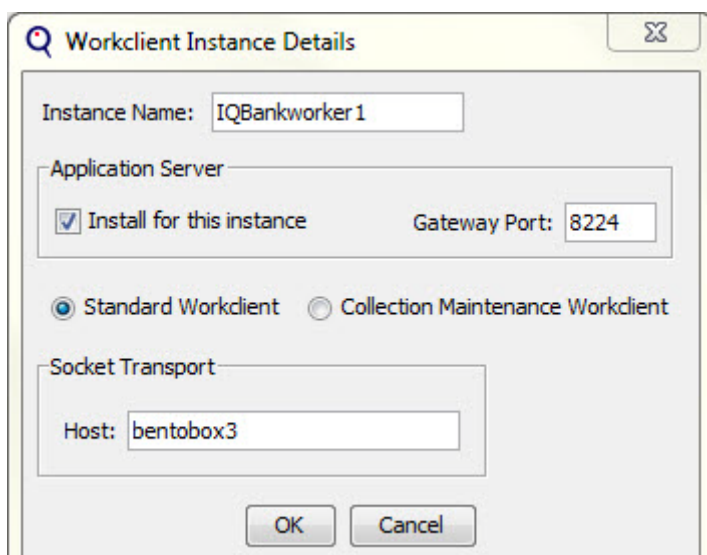
## Create the Remote Content Processing (Workclient) Instance

After the base Search software is installed on a remote server, you can install an instance of a content processing work client on it using the `createApp` utility. Follow these instructions:

- 1 Copy the keystore from the scheduler installation to this installation overriding any existing keystore.
- 2 Start the `createApp` utility from the Common Environment.



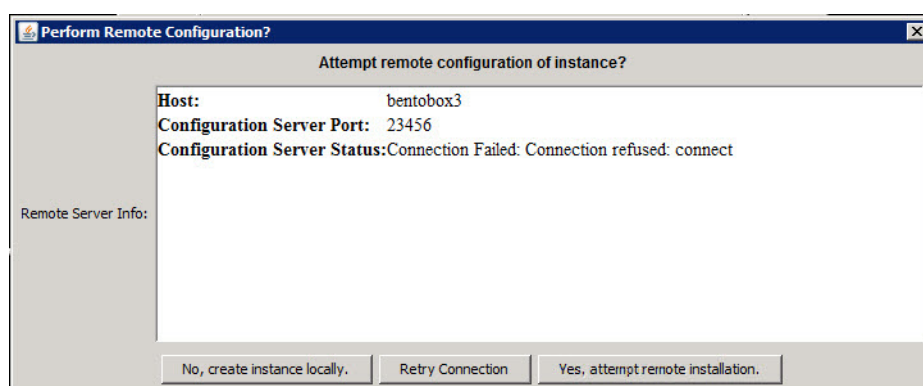
- 3 Select the **Add Workclient Instance** option.  
The Workclient Instance Details dialog displays.



4 Fill in the required fields for the remote workclient server.

5 Select **OK**.

The Create Application program attempts to connect to the specified processor, and displays connection status:



6 Select **Yes, attempt remote installation**.

If you are not creating a distributed multi-server Oracle Knowledge application Search installation (using remote processors) select **No, create instance locally**.

7 The Application Details dialog displays the settings for the defined instances that are created. Verify the values, click **OK**.

8 Click **Create Configuration**.

9 Review the confirmation screen and save your changes to create the content processing instance.

If you are using a Websphere application server, then you must follow step 10 - step 12, otherwise skip to step 13.

10 Go to <Install\_Dir>/conf directory and make a copy of websphere\_template.properties and rename it to websphere\_<instanceName>.properties. Then, replace the placeholders in this file with actual values. You can generate ENCRYPTED\_USER\_NAME and

ENCRYPTED\_PASSWORD by using the `encrypt.sh` command from the ICE prompt and passing profile username and password on which you want to deploy the workclient application. `appName` and `contextRoot` being constant values for each instance type.

For workclient, these are `appName=workclient` and `contextRoot=/workclient`.

- 11** Return to the Common Environment command line prompt.
- 12** Run `buildWebapp.sh`, `setServerArgs.sh` and `deployApp.sh` to build and deploy the application.
- 13** Return to the Common Environment command line prompt.
- 14** Run `buildWebapp` and `deployApp` to build and deploy the application.

## Create the Remote Request Processing (Runtime) Instance

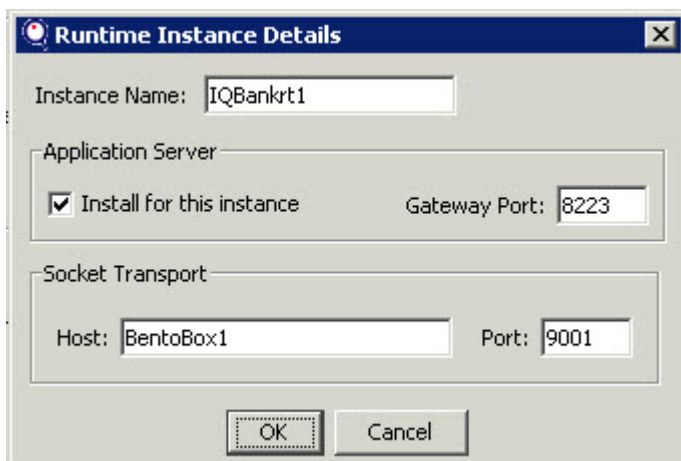
After the base Search software is installed on a remote server, you can install an instance on your local server, the Application Details dialog displays an option to create a remote request processing (Runtime) instance.

Do the following:

- 1 Start the createApp utility from the Common Environment.



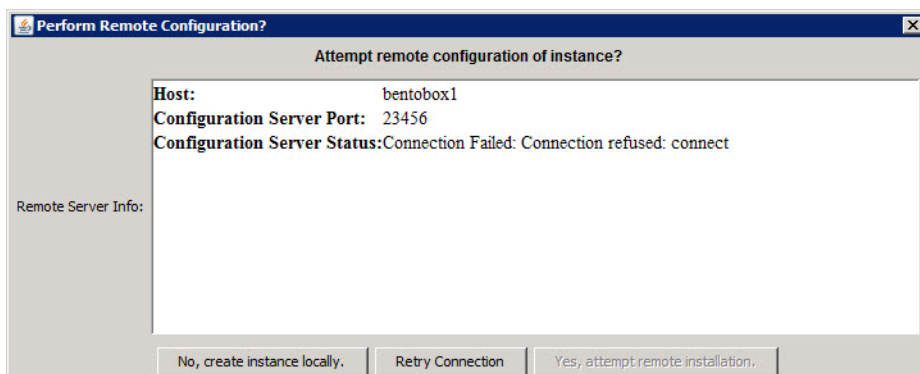
- 2 Select the **Add Runtime Instance** option. The runtime Instance Details dialog displays.



- 3 Fill in the required fields for the remote runtime instance.

- 4 Select **OK**.

The Create Application program attempts to connect to the specified processor, and displays connection status.



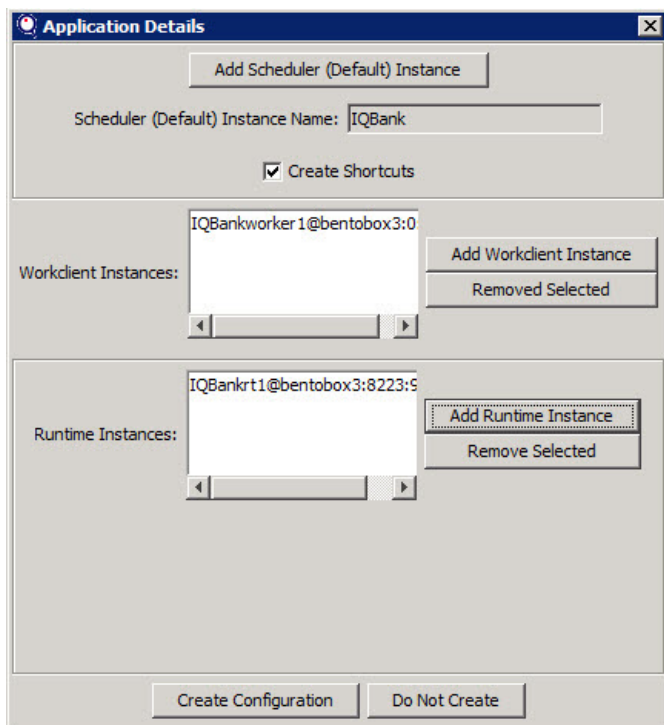
- 5 Select **Yes, attempt remote installation**.

If you are installing the Runtime instance on the local server, select **No, create instance locally**.

The Application Details dialog displays the settings for the defined instances that are created.

## Confirming the Distributed Application Details

On your local server, the Application Details dialog displays the parameters of the defined instances that are created.

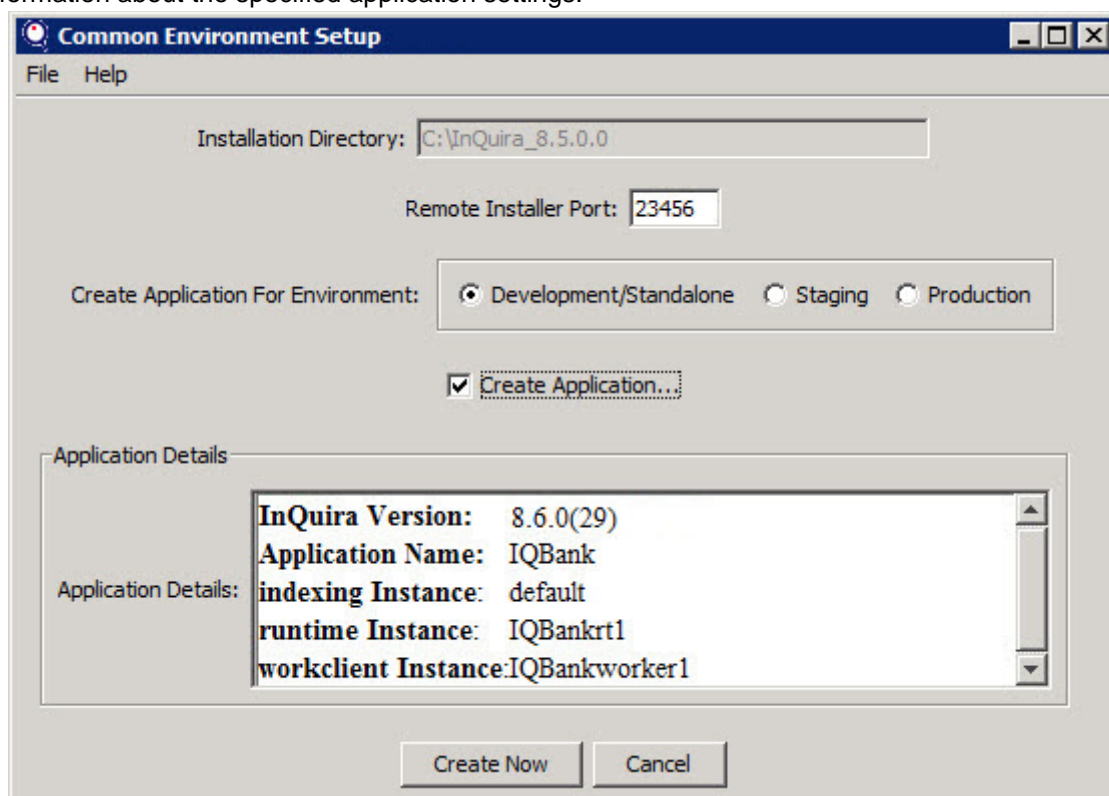


Select **Create Configuration**.

The Oracle Knowledge Common Environment Setup dialog displays summary information about the specified application settings, as described in “Creating the Specified Distributed Application” on page 76.

## Creating the Specified Distributed Application

On your local server, the Oracle Knowledge Common Environment Setup dialog displays summary information about the specified application settings.

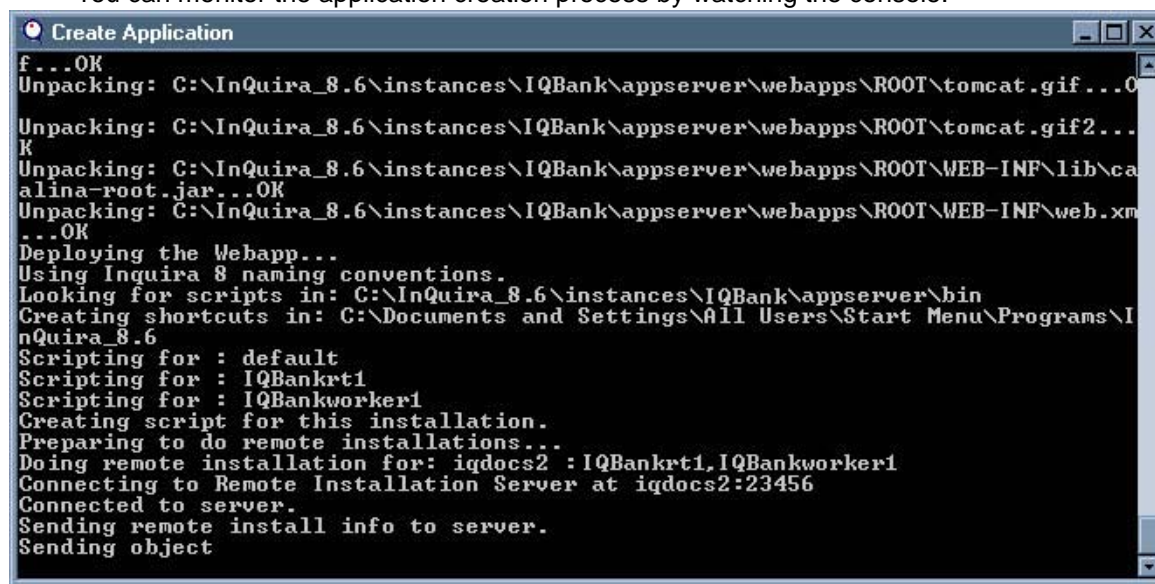


### 1 Select **Create Now**.

The instance certification is saved locally and an attempt is made to send it to each remote instance for which **Yes, attempt remote installation** was selected. If the ICE remote installer is running on each of these systems, each receives and saves their respective configuration.



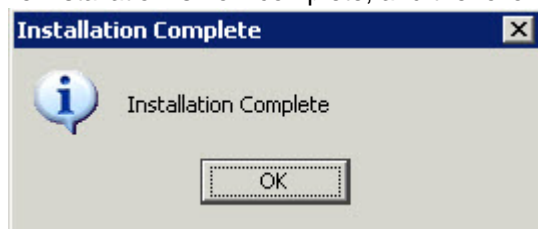
You can monitor the application creation process by watching the console.



```

Create Application
f...OK
Unpacking: C:\InQuira_8.6\instances\IQBank\appserver\webapps\ROOT\tomcat.gif...O
K
Unpacking: C:\InQuira_8.6\instances\IQBank\appserver\webapps\ROOT\tomcat.gif2...
K
Unpacking: C:\InQuira_8.6\instances\IQBank\appserver\webapps\ROOT\WEB-INF\lib\ca
alina-root.jar...OK
Unpacking: C:\InQuira_8.6\instances\IQBank\appserver\webapps\ROOT\WEB-INF\web.xml
...OK
Deploying the Webapp...
Using InQuira 8 naming conventions.
Looking for scripts in: C:\InQuira_8.6\instances\IQBank\appserver\bin
Creating shortcuts in: C:\Documents and Settings\All Users\Start Menu\Programs\I
nQuira_8.6
Scripting for : default
Scripting for : IQBankrt1
Scripting for : IQBankworker1
Creating script for this installation.
Preparing to do remote installations...
Doing remote installation for: iqdocs2 : IQBankrt1,IQBankworker1
Connecting to Remote Installation Server at iqdocs2:23456
Connected to server.
Sending remote install info to server.
Sending object
  
```

The installation is now complete, and the following message displays:



## 2 Select **OK**.

The Create Application program closes.

## Restart the WebLogic Node Manager

After the installation completes, you must restart the WebLogic Node Manager.

This is required because changes are made to the Node Manager configuration during instance configuration that cannot take effect until it is restarted. Specifically, if the Node Manager isn't restarted after configuring the instances, it will not read the changed `nodemanager.properties` file and will not run the `startWebLogic.{cmd,sh}` script before starting the instances, which will cause errors. It must be restarted before the Managed Server for the Search instance can be started through the WebLogic Administration Console.

For additional WebLogic information, see "Start Oracle Knowledge on WebLogic Server" on page 38.

## Configure the Application Data Stores

To configure the application data stores, you access the Advanced Configuration section in System Manager. Before you can log into the Search System Manager web application, you must first set the administrator password using the Workbench utility.

## Setting the Administrator Account Password in Workbench

Perform the following steps to reset the Administrator password:

- 1 Open a command prompt into the Common environment for the content processing instance.
- 2 On Linux execute `workbench.sh`,  
On Windows execute `workbench.bat`.
- 3 When the Workbench utility displays, enter the following (case sensitive):
  - a Username: Administrator
  - b Password: Administrator
- 4 Enter the new password for the Administrator account when prompted.

You can now log into the Search System Manager console using the new password for the Administrator account.

## Accessing System Manager

Use System Manager to configure content processing and data storage options for your application.

You must first set the Administrator password using the Workbench utility before you can to log into System Manager. See “Setting the Administrator Account Password in Workbench” on page 78.

The System Manager requires that the Oracle Knowledge Application Service is running.

To access System Manager:

- 1 Use the System Manager shortcut (on Windows).  
or  
Open a Web browser and enter the following URL:  
`http://<hostname>:<port>/inquirawb/`  
where `<hostname>:<port>` specifies the application server/gateway and port specified during the installation process, as described in “Create a Content Processing Instance” on page 69. The default port is 8222.  
The System Manager Login page displays. The System Manager login fields are case-sensitive.
- 2 Log onto the System Manager as:
  - User name: Administrator
  - Password: `<password defined in “Setting the Administrator Account Password in Workbench”>`.The System Manager displays the Job List.
- 3 From the Job List Screen, select the Tools menu in the upper-right portion of the screen.
- 4 Select **Advanced Config**.  
The System Manager displays the Advanced Configuration page.

The Advanced Configuration Facility is divided into the following functional areas:

- System
- Instances

See the *Oracle Knowledge Intelligent Search Administration Guide* for more information on the Advanced Configuration Facility and advanced Oracle Knowledge administration.

## Configuring the Application Data Stores

An Oracle Knowledge application requires configured data sources for various types of application data. Using System Manager (see [Starting the System Manager](#)), you configure an application to use a single data source for the required data tables, which includes:

- The Content Store, which contains the indexed documents used to answer users' questions.
- The Quality Monitor data store, which stores data used for testing application request processing performance.

If you use the optional Oracle Knowledge Information Manager product, you must configure data sources, as described in the Information Manager product documentation.

You configure data sources for an application by:

- Specifying database connection information for each component
- Creating the data tables

To configure data sources for additional components, select the corresponding Advanced Configuration facility menu items, and configure the appropriate data sources:

### To Configure the

### Data Source for... Select...

|                       |                                                                                                         |
|-----------------------|---------------------------------------------------------------------------------------------------------|
| Content Store         | <b>Content Storage</b> , in the <b>Instances</b> portion of the <b>Advanced Configuration</b> facility. |
| Quality Monitor Store | <b>Workbench</b> , in the <b>System</b> section of the <b>Advanced Configuration</b> facility.          |

See “Configuring the Application Data Stores” on page 79 for detailed content store data source configuration information.

See “Configuring the Quality Monitor Data Source” on page 82 for detailed Quality Monitor store data source configuration information.

## Configuring the Content Store Data Source

The Oracle Knowledge Content Store is the database that contains the application content used in request processing.

You must configure a data source for the Content Store to store content for use by the application.

You configure the data source for the Content Store by specifying appropriate values for the fields in the Content Store Data Sources page of the Advanced Configuration Facility.

You can use a single database as a data source for multiple Oracle Knowledge components; for example you can configure the same database for the Content Store and the Oracle Knowledge module.

To configure a data source for the Content Store do the following:

- 1 Select **Content Storage** from the Instances section of the Advanced Configuration Facility menu. The Content Storage page displays.

ORACLE Advanced Configuration [HELP ?](#)

**Content Storage**

☐ Show Advanced Options Edit

**Data Source** : inquir\_a\_Oracle

**Default Encoding** ▶ content.encoding[Cp1252] (Cp1252)content.encoding[Cp1252] (ISO-8859-1)

**Default Language** ▶ English United States

Edit

- 2 Select **Edit** on the Content Storage page.

Content Storage page displays the list of defined data sources in the Data Source field.

ORACLE Advanced Configuration [HELP ?](#)

**Editing: Content Storage**

☐ Show Advanced Options OK Cancel

**Data Source** : inquir\_a\_Oracle Edit List

**Default Encoding** ▶ content.encoding[Cp1252] (ISO-8859-1)

**Default Language** ▶ English United States

OK Cancel

- 3 Select **Edit List** in the Data Source field.

The Data Sources page displays the currently configured data sources.

- 4 Select the copy icon next to appropriate sample data source, for example, SAMPLE\_MSSQL.

ORACLE Advanced Configuration [HELP ?](#)

**Editing: Content Storage > Data Sources**

OK Cancel

**Data Sources** :

|                     |  |  |
|---------------------|--|--|
| inquira_Oracle      |  |  |
| SAMPLE_MSSQL        |  |  |
| SAMPLE_MSSQL (copy) |  |  |
| SAMPLE_ORACLE       |  |  |

[Add New Item](#)

OK Cancel

- 5 Select the **Data Sources** name to edit that item.

The Data Sources page displays fields for entering data source information.

**ORACLE** Advanced Configuration HELP ?

Editing: Content Storage > Data Sources > Data Sources

**Item Name** ▶ Inquire\_Oracle (copy)

**Data Sources**

**datasourceType** ▶ Oracle [Edit List](#)

**URL** ▶ jdbc:oracle:thin:@slc01n:1521:slc01n

**User** ▶ Administrator

**Password** : .....

**Properties**

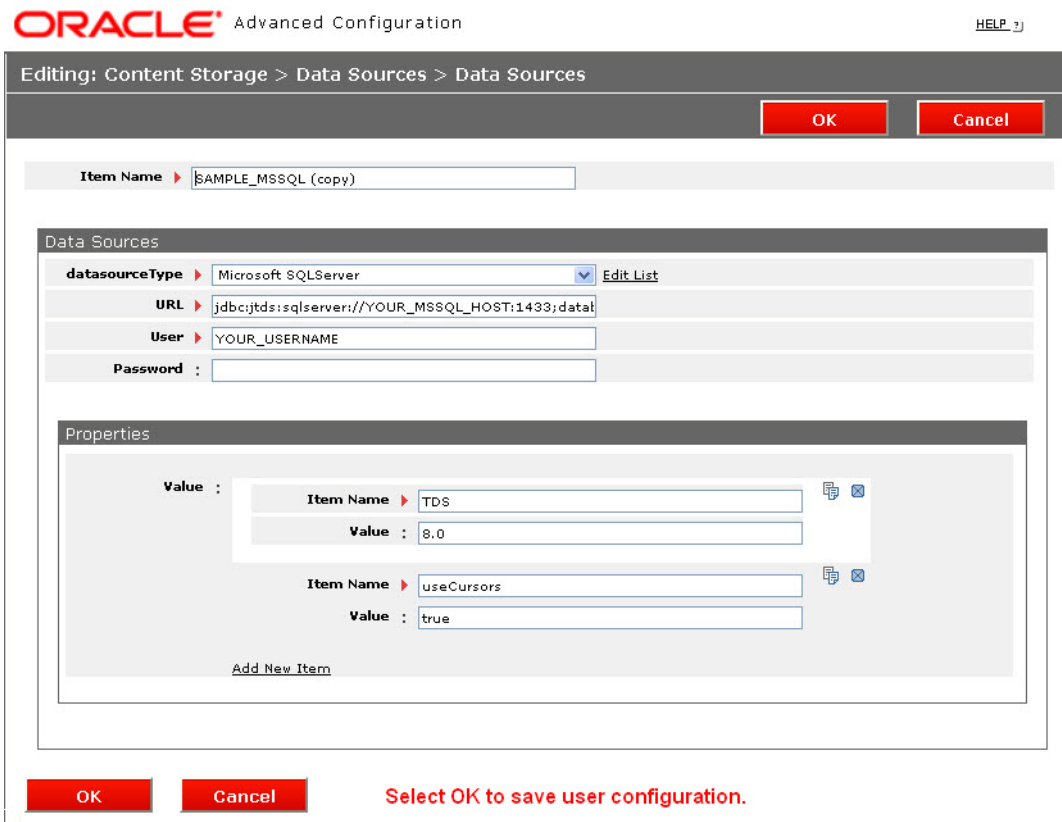
**Value** : (none)  
[Add New Item](#)

**OK** **Cancel**

- 6 Specify the following parameters to configure the data source:

| Parameter              | Description                                                                                                                                                                                                                                                                                                                                         |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Item Name</b>       | Specify a name for the data source. The name must be a single string without spaces.                                                                                                                                                                                                                                                                |
| <b>Datasource Type</b> | Specify the database type. Select the type of data source from the list of supported types (ORACLE, MSSQL).                                                                                                                                                                                                                                         |
| <b>URL</b>             | Specify the connection URL for the JDBC connection. Enter the value of the connection URL as appropriate for your RDBMS and JDBC driver, for example, YOUR_HOST_NAME and YOUR_DATABASE_NAME.                                                                                                                                                        |
| <b>User</b>            | Specify the user name to use for the specified data source.                                                                                                                                                                                                                                                                                         |
| <b>Password</b>        | Specify the password to use for the specified data source. The Advanced Configuration Facility encrypts the saved password; the contents of the field might not appear to match the specified password.                                                                                                                                             |
| <b>Properties</b>      | Specify any additional required connection properties. The sample data source configurations might contain additional default properties.                                                                                                                                                                                                           |
| <b>TDS</b>             | (MS SQL Server only) Specifies the Tabular Data Stream (TDS) version. TDS is the protocol that SQL Server uses to communicate with database clients. SQL Server 2005 uses Version 8.0. Newer database server versions usually understand older protocol versions.                                                                                   |
| <b>UseCursors</b>      | (MS SQL Server only) Specifies that the TDS driver uses server side cursors instead of direct selects (AKA firehose cursors) for forward-only read-only result sets.<br><br>For other types of result sets, server- or client-side cursors are always used.<br><br>SQL Server creates a fast forward-only cursor when this property is set to true. |

- 7 Select **OK** to save your changes while reverting to the Content Storage page.



ORACLE® Advanced Configuration HELP ?

Editing: Content Storage > Data Sources > Data Sources

**Item Name** ▶ SAMPLE\_MSSQL (copy)

**Data Sources**

**datasourceType** ▶ Microsoft SQLServer Edit List

**URL** ▶ jdbc:jtds:sqlserver://YOUR\_MSSQL\_HOST:1433;data

**User** ▶ YOUR\_USERNAME

**Password** :

**Properties**

**Value** :

**Item Name** ▶ TDS ✎ ✕

**Value** : 8.0

**Item Name** ▶ useCursors ✎ ✕

**Value** : true

[Add New Item](#)

**OK** **Cancel** Select OK to save user configuration.

- 8 Select **OK**.
- 9 Select your newly created Data Source from the drop down list.
- 10 Select **OK**.
- 11 Select **Save**.

## Configuring the Quality Monitor Data Source

The Oracle Knowledge Quality Monitor Data Store is the database that stores data used for testing application request processing accuracy.

You must configure a data source for the Quality Monitor Data Store to store content for use by the application. See in for more information. You configure the data source for the Quality Monitor by specifying appropriate values for the fields in the Workbench page of the Advanced Configuration Facility. It is possible to re-use the same schema as the Content Store database tables.

To configure a data source for the application:

- 1 Select **Workbench** from the **System** section of the **Advanced Configuration** facility menu. The Workbench page displays.
- 2 Select **Edit** on the Workbench page. Workbench page displays a drop down list of data sources.

- 3 If you want to re-use the Content Store data source, select that data source. Otherwise, create a new data source for your Quality Monitor schema, following step 3 - step 9 under “Configuring the Content Store Data Source” on page 79.
- 4 Select **OK** to save your changes and return to the Advanced Configuration page.
- 5 Select **Save** on the Workbench page.

You can now create the tables for the Oracle Knowledge content store, as described in [Create the Search Application Database Tables](#).

## Create the Search Application Database Tables

The Common Environment provides a facility to create the Content Store and Quality Monitor database tables for the configured data source.

To create the content store database tables, enter the following command from the Common Environment prompt:

- 1 On Linux:

```
createContentStore.sh
```

On Windows:

```
createContentStore.bat
```

- 2 Restart the application instance. See the instructions under “Restarting the Application” on page 71.

To create the Quality Monitor database tables, enter the following command from the Common Environment prompt:

- 1 On Linux:

```
createQualityMonitorStore.sh
```

On Windows:

```
createQualityMonitorStore.bat
```

- 2 Restart the application instance. See the instructions under “Restarting the Application” on page 71.

## Viewing the Oracle Knowledge Search Application Logs

The Common Environment provides a facility for viewing the STDOUT and STDERR logs for the Oracle Knowledge Web application.

On Windows, you must have first installed the utilities described in “UNIX grep, rm, tail, and wget Utilities” on page 24.

To view the application logs:

Enter the following command at the Common Environment command prompt:

```
tailTheLog.sh -a
```

Oracle Knowledge displays application log information in a separate window.

See the *Oracle Knowledge Intelligent Search Administration Guide* for more information on Oracle Knowledge logs and how to access log data.

## Working with the Configured Application

The Oracle Knowledge application is now configured and ready to use. You can now begin working with the application to process content, schedule tasks, and develop language processing components using the System Manager, and additional Oracle Knowledge tools and processes.

To begin working with the application by processing content and scheduling jobs, see the *Oracle Knowledge Intelligent Search Administration Guide*.

To begin working with the application by developing language processing components, see *Oracle Knowledge Intelligent Search Language Administration Guide* and *Oracle Knowledge Intelligent Search Language Developers' Guide*.



# Installing Oracle Knowledge Information Manager

This chapter describes the installation process for Oracle Knowledge Information Manager.

## Oracle Knowledge Information Manager Application Components

An Information Manager application uses the following components, which are installed and configured in the standard installation process. You can configure Information Manager components on a single server or distribute them throughout a network.

The following table describes the relationships between the logical application components:

| Component                                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Information Manager Tag Library Web Applications | Information Manager uses a J2EE servlet container supporting JSP version 1.2 and higher compatible tag libraries to distribute Information Manager application content.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Web Server                                       | An external Web server is used as the primary interface to the Information Manager based Web applications.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Information Manager Content Resource Store       | The Information Manager Content Resource Store stores resources (files) that are attached to content records in the application. The content resource store is a directory on a file system that is accessible to the Management Console and the application Web server. It can be located on the same server as the Management Console, or on a network file system. You can configure Information Manager to maintain separate staging and production resource stores. Resources can be served by separate Web servers or configured to use resource caching services (such as Akamai). The content resource store stores XML versions of content records used for search indexing, and tracks all versions of content records and attached resources. |
| Management Console                               | <p>The Management Console is a Web-based user interface to all content creation and management functions. The Management Console can be replicated on multiple servers.</p> <p>There are two different configurations that a management console can run in. When running in "batch" mode, the IM Console should be used to process batch operations and content crawling requests. When running in "authoring and admin" mode, the instance can be used to configure the IM repository and author knowledge articles.</p>                                                                                                                                                                                                                                |
| Database Server                                  | The Information Manager database stores the Information Manager content management objects. The installation process automatically creates the required tables in a specified database.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Information Manager Web Services                 | Information Manager provides an open set of Web services and a native platform API (Java and Microsoft .Net platforms) to support adding and modifying content, content categories, and user information from external applications.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

## About the IM Management Console and Batch Jobs

The IM Management Console has the ability to run jobs, or processes, that maintain the repository's data through a job scheduling service. These jobs are referred to as batch jobs. Each non-system repository contains its own set of batch jobs to maintain its data. Though each repository manages its own batch jobs, every job in every repository is managed by a single system-wide job scheduling service.

When a new repository is created, the system assigns a set of mandatory and standard batch jobs to it and registers them with the system's job scheduler. When a repository is deleted, the system unregisters the repository's batch jobs from the system's job scheduler.

If you are installing multiple instances of the IM Management Console, only one can be configured to run batch jobs, in order to maintain the integrity of the job scheduler.

The IM Management Console can be configured when you install or configured as a post-installation task.

## Installing and Configuring Information Manager

The Information Manager installation process uses an automated installation program that copies the Information Manager product files from the product distribution and installs and configures Information Manager with an existing Oracle Knowledge application.

### Single Server Installation

The standard installation process using the packaged installer installs and configures all Information Manager components on a single server. The standard process requires an existing Oracle Knowledge Intelligent Search instance on the target server. The stand-alone installation installs all of the necessary components to run Information Manager without requiring a previously installed installation of Oracle Knowledge Intelligent Search.

In a single server environment, the Information Manager Content Resource Store is created on the local file system, as follows:

If you are on WebLogic, the default location is:

```
<Oracle_Knowledge_home>/instances/<instance_name>/webapps/<OKResource App  
Name>/app/resources,  
where <OKResource App Name> is OKResources by default and can be configured during the  
installation process.
```

This folder is served by the Oracle Knowledge Resources Web application.

In a single server environment, the Web application serves images and accesses the Information Manager application.

### Multiple Server Installation

If you install instances of Information Manager on multiple servers, you must configure each physical server to use a <Oracle\_Knowledge\_home> directory. You can accomplish this by:

- Manually copying the <Oracle\_Knowledge\_home> directory to each new installation
- Placing the <Oracle\_Knowledge\_home> directory on a networked drive that is shared by all servers that host Information Manager instances

Information Manager stores configuration settings that you specify in the management console in a file, `configuration.properties`, which resides in the `<Oracle_Knowledge_home>` directory. The default repository configuration file is `<Oracle_Knowledge_home>/config/SYSTEM/config.properties`. When you change the configuration for your application repository, e.g. CUSTOMER, Information Manager stores the application-specific properties in `<Oracle_Knowledge_home>/config/SAMPLE/config.properties`.

If you are operating multiple Information Manager instances, then We recommend that you designate one instance as the master instance, and make configuration changes only in that instance. You can then make the configuration changes available to the additional instances by copying or sharing the `<Oracle_Knowledge_home>` directory.

If you are installing Information Manager on one server and Web applications on another, the tasks and refer to the server where the Web applications are to be installed. If you do not have a machine on the server, answer No to the question "Is this an existing machine on your domain?"

**Important!** You must restart all applications to apply configuration changes.

You can also install the Management Console and the tag library applications on separate remote servers.

The Information Manager Content Resource Store can be stored using FTP or local copy, either on a network file system or on a local file system on the same server as the Management Console. The file system must be visible to a Web server to serve the attached resources. The file system used to store attachments for the Information Manager application must have read/write access for the Information Manager management console and other Information Manager applications that are used to create or modify content.

## The Information Manager Installation Process

The Information Manager installation process uses an automated program that installs and configures:

- The Information Manager product components, including the Management Console, the JSP Tag Library, and the optional Information Manager Web Services.
- The Information Manager content database schema.
- Configures the IM components as managed servers in a WebLogic domain.

The installation process consists of the following steps:

- 1 Ensure that WebLogic is installed and the Node Manager and Admin Servers are running.
- 2 A WebLogic domain must be configured.

**Important!** Any changes to your domain must be activated and your domain cannot be running in edit mode while running this installer.

- 3 Start the installer, as described in "Running the Information Manager Installer" on page 88.
- 4 Supply the following information to the installer:
  - Information about the database that you use to store Information Manager content
  - Administrator passwords for the administrative repository
  - Administrator email information
  - Information about how you store and retrieve content resources (files such as text documents and spreadsheets) that are attached as supporting documents for Information Manager content items

When the installation process is complete, you can configure a Web application by: defining the application repository and the initial administrative user.

## Running the Information Manager Installer

Start the installer by locating and executing the appropriate version of the installer for your environment.

## Starting the Installer in Windows Environments

On Windows 2008, the user must be part of the Administrators group to install and operate Oracle Knowledge products.

To start the installer in Windows environments:

Double-click the installation file:

– or –

Run the file using the command line with the following command:

```
install_im_<app_server>_<operating_system>_build_<#>.exe
```

## Starting the Installer in Linux Environments

On Linux, Oracle Knowledge software must be installed using a non-root user. Before running the installer, create a standard Oracle Knowledge admin (Linux) user in the operating system. This user installs and runs the Oracle Knowledge software and must be given permission to access network shares while running as a service.

To start the installer in Linux environments:

- 1 Open a bash shell by entering bash command:

```
bash
```

- 2 Use `cd` to go to the installer temporary directory.

- 3 Set the default locale for the bash shell to `en_US` by entering the following:

```
export LC_ALL="en_US"
```

- 4 Set permissions on the binary files so that they are executable by entering:

```
chmod +x *.bin
```

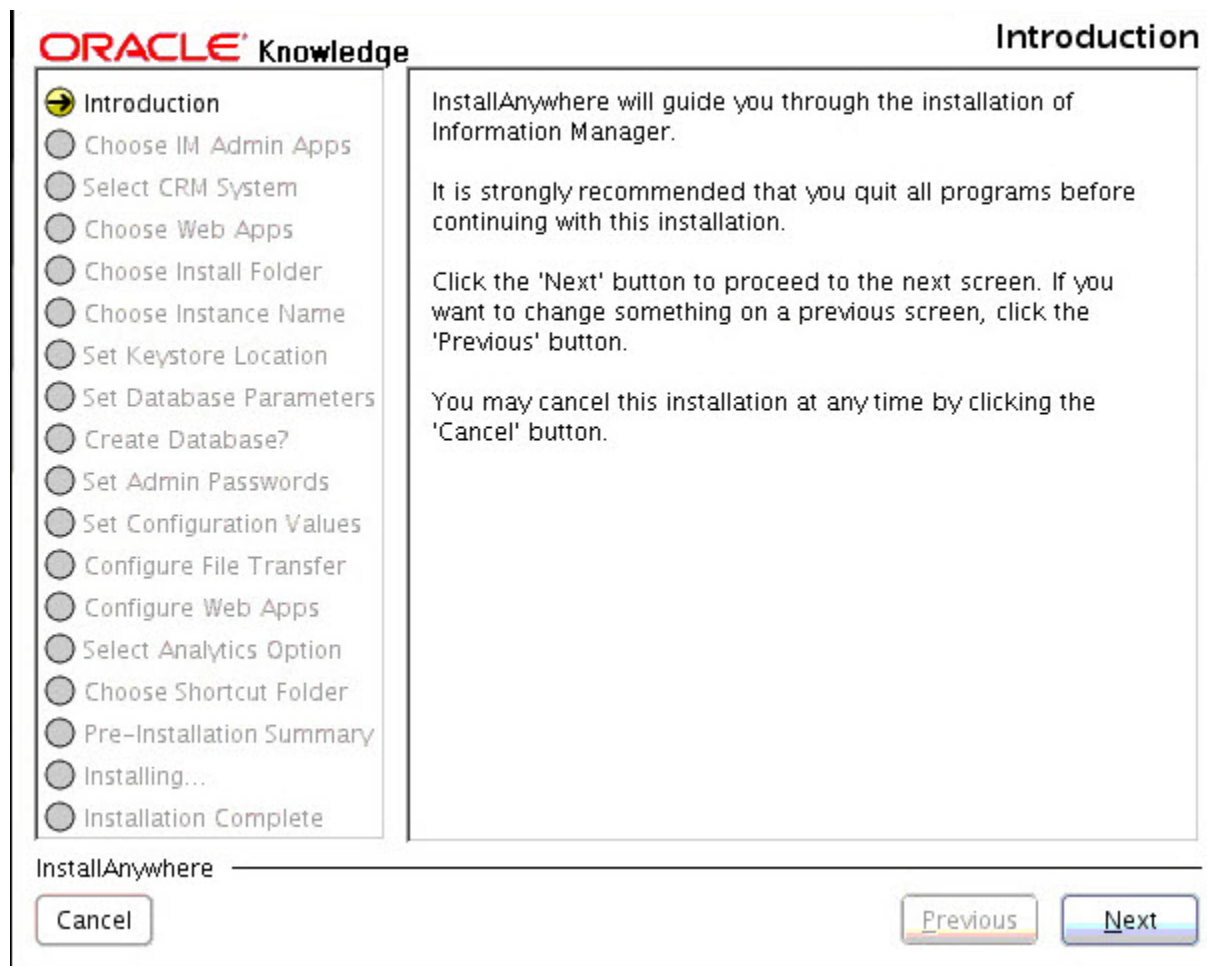
- 5 Start the installer:

```
./install_im_<app_server>_<operating_system>_build_<#>.bin
```

When the initialization progress dialog completes, the installer displays the introduction screen. The Installation Introduction screen recommends that all other programs running be stopped and provides information on operating the installer.

## The Information Manager Installation Introduction

The installer's introduction screen provides general information about the installation process and recommends that you close any other programs that are currently running.



Select **Next** to continue.

The installer displays the Information Manager Administration Applications selection screen.

## Select Information Manager Administration Applications

Select the Information Manager Administration Applications you would like to install. At least one instance of IM Console and IM Web Services must be installed within an environment (development, staging, production). Until an IM repository is created, it is not possible to deploy web applications successfully.

**ORACLE Knowledge** **Choose IM Admin Apps**

Introduction  
➔ Choose IM Admin Apps  
Select CRM System  
Choose Web Apps  
Choose Install Folder  
Choose Instance Name  
Set Keystore Location  
Set Database Parameters  
Create Database?  
Set Admin Passwords  
Set Configuration Values  
Configure File Transfer  
Configure Web Apps  
Select Analytics Option  
Choose Shortcut Folder  
Pre-Installation Summary  
Installing...  
Installation Complete

Please select the admin applications you would like to install below.

☒ IM Console  
☒ IM Web Services

InstallAnywhere

Cancel Previous Next

The installer displays the following options:

- IM Console
- IM Web Services

Select the Administration applications to install.

Select **Next** to continue.

The installer displays the CRM System selection screen.

## Select the CRM System

Select the CRM system with which you are integrating. Choose **Other** to install the base iConnect software for use when creating custom integrations to non supported CRM systems. Choose **None** to enable the default web self service application, InfoCenter, to be installed without installing any CRM integration support.

The installer displays the following options:

- Oracle CRM On Demand
- Siebel CRM
- Other
- None

For the initial installation, select None. After Information Manager has been installed and a repository has been configured, run the installer again to install CRM systems and web applications. The choice of CRM affects the available Web applications for installation.

Select **Next** to continue.

The installer displays the **Choose the Web Applications to Install** screen.

**Note:** If Siebel CRM is selected, the installer displays the **Configure Information Manager for Siebel CRM** screen.



## Configure Information Manager for Siebel CRM

The Configure Siebel screen shows options for configuring Information Manager to integrate with Siebel CRM. Siebel integration requires the manual deployment of specialized Siebel Import Files (SIF) that Oracle Knowledge uses to communicate with your Siebel installation. In this screen are two inputs:

- Selecting the Siebel version
- Selecting the SIF location for deployment

**ORACLE Knowledge** **Configure Siebel**

Introduction  
Choose IM Admin Apps  
**Select CRM System**  
Choose Web Apps  
Choose Install Folder  
Choose Instance Name  
Set Keystore Location  
Set Database Parameters  
Create Database?  
Set Admin Passwords  
Set Configuration Values  
Configure File Transfer  
Configure Web Apps  
Select Analytics Option  
Choose Shortcut Folder  
Pre-Installation Summary  
Installing...  
Installation Complete

Please enter the Siebel configuration information.

Select the version of Siebel you are using.

☐ 7.8  
☐ 8.1  
☒ 8.2

Select the location where the SIFs will be deployed.

/scratch/qauser/Oracle/Knowledge/IM/archive/siebel

InstallAnywhere

The following are the options for the Siebel CRM version:

- 7.8
- 8.1
- 8.2

The default version of Siebel CRM is 8.2.

After selecting the version of Siebel CRM, select **Choose** to open a file browser and select the SIF location. Use the **Restore Default Folder** option to reset the default directory, if necessary.

Select **Next** to continue.

The installer displays the **Choose the Web Applications to Install** screen.



## Choose the Web Applications to Install

Select the Web applications to install: iConnect, iConnect for Siebel, iConnect for Oracle CRM On Demand, Information Center (InfoCenter), or Self-Service Portal (SSP). The Web applications can be installed independently or in any available combination.

The Web application choices vary with the CRM system chosen. Refer to the following table for the Web application choices available for each of the of CRM systems.

| CRM System           | InfoCenter | iConnect | SSP |
|----------------------|------------|----------|-----|
| Oracle CRM On Demand | No         | Yes      | Yes |
| Siebel CRM           | Yes        | Yes      | No  |
| Other                | Yes        | Yes      | No  |
| None                 | Yes        | No       | No  |

**Note:** Installing Web applications also requires configuration to an existing Information Manager repository. You must complete one full installation and configure a repository before installing

Select **Next** to continue.

The installer displays the installation location selection screen.

## Select the Installation Location

Select the location at which you want to install Information Manager.

The installer displays the default Oracle Knowledge installation directory:

- <user\_home>/Oracle/Knowledge/IM on Linux
- C:\Oracle\Knowledge\IM on Windows

You can install at any location. The suggested location is the base Oracle Knowledge application directory for Information Manager (for example: C:\Oracle\Knowledge\IM on Windows).

**ORACLE Knowledge** **Choose Install Folder**

☒ Introduction

☒ Choose IM Admin Apps

☒ Select CRM System

☒ Choose Web Apps

☒ **Choose Install Folder**

☐ Choose Instance Name

☐ Set Keystore Location

☐ Set Database Parameters

☐ Create Database?

☐ Set Admin Passwords

☐ Set Configuration Values

☐ Configure File Transfer

☐ Configure Web Apps

☐ Select Analytics Option

☐ Choose Shortcut Folder

☐ Pre-Installation Summary

☐ Installing...

☐ Installation Complete

**Where would you like to install?**

/home/kaag/Oracle/Knowledge/IM

InstallAnywhere

Specify the appropriate directory.

Select **Choose** to open a file browser and select an alternate Oracle Knowledge base directory. Use the **Restore Default Folder** option to reset the default installation directory, if necessary.

Select **Next** to continue.

If the location you selected is appropriate, the installer displays the Instance Name specification screen. If the installer detects that the location contains an existing Oracle Knowledge Intelligent Search or Analytics installation or an existing Oracle Knowledge Information Manager installation with one or more of the applications you selected already installed, the installer prompts you to provide an alternate location.

## Specify the InfoManager Instance Folder

Enter the InfoManager instance name where the application server is to be installed.

The screenshot shows the 'Choose InfoManager Instance Folder' step of the Oracle Knowledge installation wizard. On the left is a vertical list of 18 steps, each with a radio button. The steps are: Introduction, Choose IM Admin Apps, Select CRM System, Choose Web Apps, Choose Install Folder, Choose Instance Name (highlighted with a yellow arrow), Set Keystore Location, Set Database Parameters, Create Database?, Set Admin Passwords, Set Configuration Values, Configure File Transfer, Configure Web Apps, Select Analytics Option, Choose Shortcut Folder, Pre-Installation Summary, Installing..., and Installation Complete. The main area on the right contains a text box with the instruction: 'Enter the InfoManager Instance name where the Oracle Knowledge application(s) will be installed.' Below this is a label 'Instance Name' and a text input field containing the text 'InfoManager'. At the bottom of the window, there is a 'Cancel' button on the left, and 'Previous' and 'Next' buttons on the right. The 'Next' button is highlighted with a blue gradient.

**ORACLE<sup>®</sup> Knowledge** Choose InfoManager Instance Folder

Enter the InfoManager Instance name where the Oracle Knowledge application(s) will be installed.

**Instance Name**

InfoManager

InstallAnywhere

Cancel Previous Next

Enter the **Instance Name**.

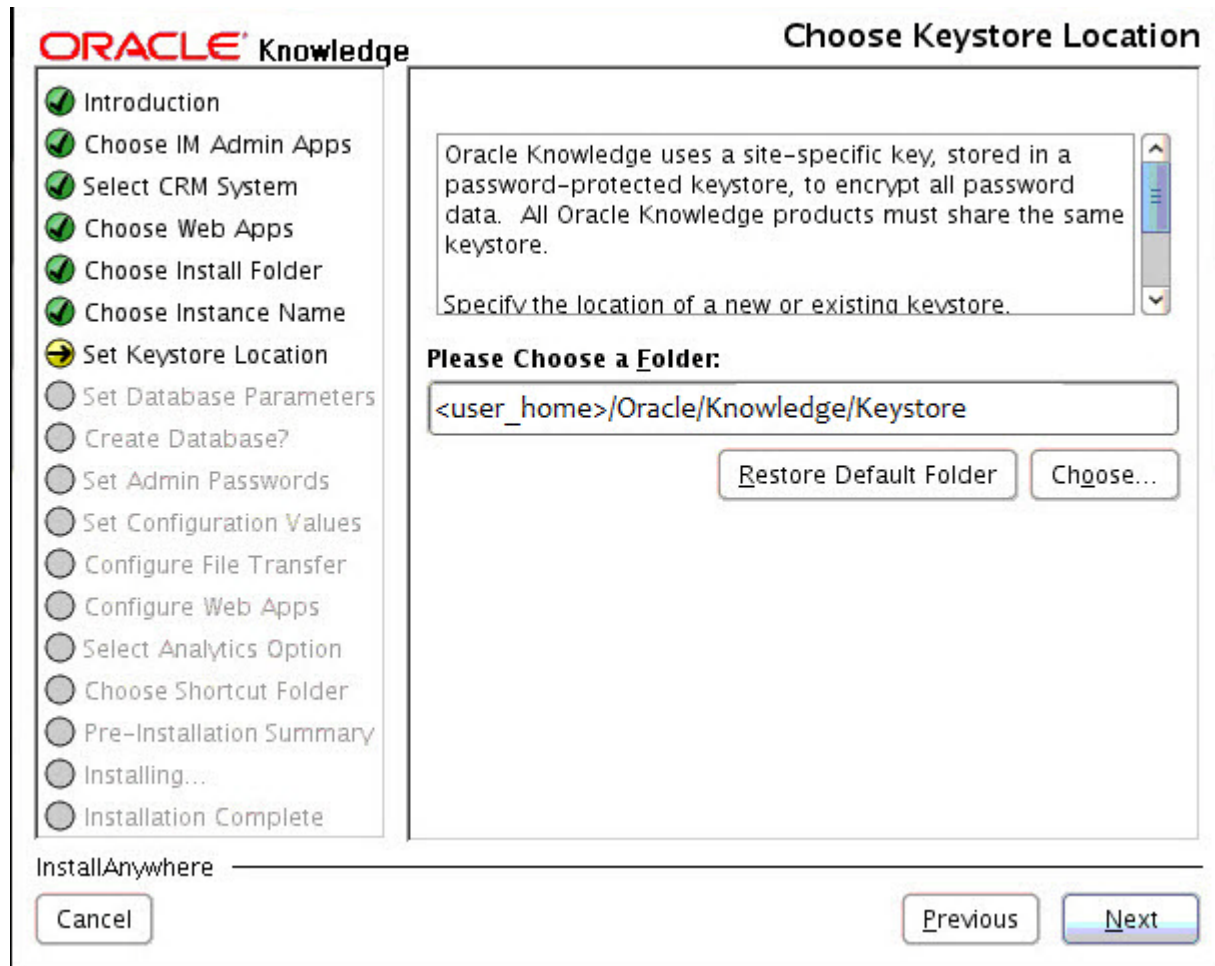
Select **Next** to continue.

The installer prompts you to configure the keystore.

## Configure the Keystore

The installer prompts you to specify the location of the Oracle Knowledge keystore. If you have already installed Oracle Knowledge Search or Analytics, use the same keystore created during that installation by selecting the location of that keystore. If you are installing Information Manager without Search or Analytics, create a new keystore.

For more information about the keystore, see “Creating the Oracle Knowledge Keystore” on page 24.



You must configure a keystore that is used by all Oracle Knowledge products, as described in “Creating the Oracle Knowledge Keystore” on page 24.

Specify one of the following:

- the location of an existing keystore that can be shared by all Oracle Knowledge products.
- the location of a new keystore that the installation program creates.

The default key store location is:

<INSTALL\_FOLDER\_PARENT>/Keystore

where:

<INSTALL\_FOLDER\_PARENT> is the parent folder of the top-level installation folder.

For example, if you are installing in <user\_home>/Oracle/Knowledge/Search, then the installer uses the default key store location: <user\_home >/Oracle/Knowledge/Keystore.

Select **Next** to continue.

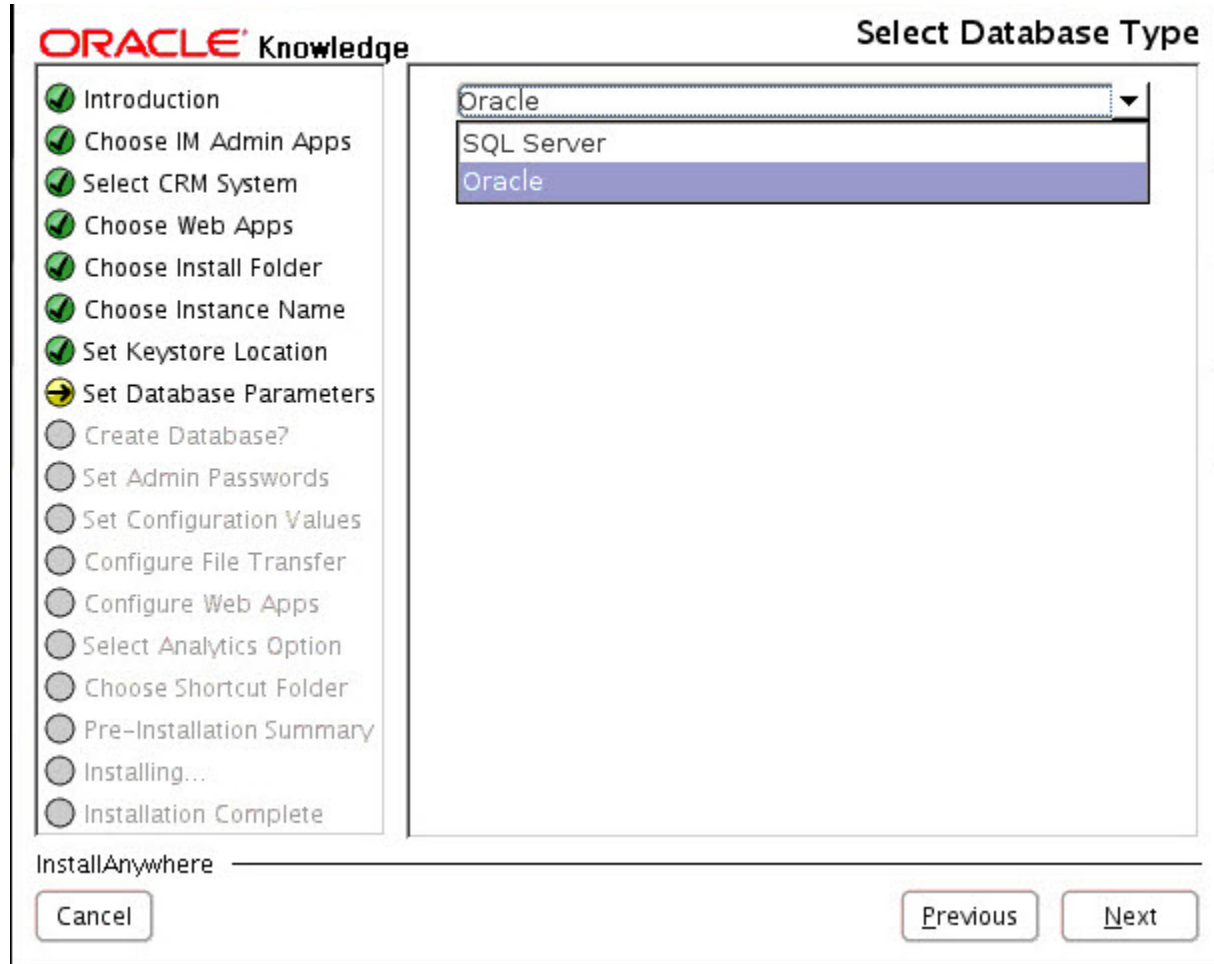
The installation program checks whether a keystore exists in the specified location.

If you specify the location of an existing keystore, the installer uses the existing keystore files to encrypt the necessary values, as required, and displays the **Specify the Information Manager Database Type** screen.

If you specify a new keystore location, the installer prompts you to create the keystore, displaying the **Create Keystore** screen. To create a new keystore, see “Create the Encryption Keystore” on page 45

## Specify the Information Manager Database Type

Select the type of database that you use for the Information Manager. The installation process prompts you to automatically create the database tables if they have not been created previously. See “Oracle Knowledge Database Schema Requirements” on page 22 in “Oracle Knowledge Installation Requirements” on page 20 for more information on supported databases.



Select the appropriate database type.

Select **Next** to continue.

The installer displays the database connection properties screen.

## Specify Database Connection Properties

Specify the connection properties for the Information Manager database. The database user must already exist, the installer must validate the database connection information before allowing you to proceed.

**ORACLE Knowledge** **Set Database Parameters**

- ☒ Introduction
- ☒ Choose IM Admin Apps
- ☒ Select CRM System
- ☒ Choose Web Apps
- ☒ Choose Install Folder
- ☒ Choose Instance Name
- ☒ Set Keystore Location
- ☒ **Set Database Parameters**
- ☐ Create Database?
- ☐ Set Admin Passwords
- ☐ Set Configuration Values
- ☐ Configure File Transfer
- ☐ Configure Web Apps
- ☐ Select Analytics Option
- ☐ Choose Shortcut Folder
- ☐ Pre-Installation Summary
- ☐ Installing...
- ☐ Installation Complete

**Database JDBC URL**  
jdbc:oracle:thin:@slc01hfp.us.oracle.com:1521:ORCL

**Database User**  
IMDoc1

**Database Password**  
\*\*\*\*\*

**Re-enter Database Password**  
\*\*\*\*\*

InstallAnywhere

Cancel Previous Next

Specify the appropriate values for the following database parameters:

| Database Property | Description                                                                                                                                                                                                                                |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Database JDBC URL | Specify the connection URL for the JDBC connection. The installer populates this field with a template based on the specified database type and the local hostname. Edit the connection URL as appropriate for your RDBMS and JDBC driver. |
| Database User     | Specify the user name to use for the specified database.                                                                                                                                                                                   |
| Database Password | Specify the password to use for the specified database.                                                                                                                                                                                    |
| Database Name     | Specify the database name. (MSSQL Server only)                                                                                                                                                                                             |

Select **Next** to continue.

The installer displays the database table creation screen.

## Specify Database Table Creation

**Note:** This screen is only available if no Web applications are selected to be installed.

The installer prompts you to specify whether the installer automatically creates the Information Manager tables in the specified database. If you do not create the tables during installation, you must create the tables manually, as described in the *Oracle Knowledge Information Manager Administration Guide* prior to using Information Manager.

The database connection properties are stored in the `$Oracle Knowledge_ROOT/InfoManager/config/IMADMIN/application.properties` and `$Oracle Knowledge_ROOT/InfoManager/config/IMWEBSERVICES/application.properties` files after the installation has been completed successfully.

The screenshot shows the 'Create Information Manager Database?' dialog box. On the left is a list of installation steps: Introduction, Choose IM Admin Apps, Select CRM System, Choose Web Apps, Choose Install Folder, Choose Instance Name, Set Keystore Location, Set Database Parameters, **Create Database?** (highlighted with a yellow arrow), Set Admin Passwords, Set Configuration Values, Configure File Transfer, Configure Web Apps, Select Analytics Option, Choose Shortcut Folder, Pre-Installation Summary, Installing..., and Installation Complete. The main area contains the question: 'If the Information Manager Database doesn't exist, do you want the installer to create it?'. Below this is a note: 'NOTE: If the schema exists and you reply Yes, the existing content will be deleted and the schema will be recreated!'. There are two radio buttons: 'Yes' (selected) and 'No'. At the bottom are 'Cancel', 'Previous', and 'Next' buttons. The 'InstallAnywhere' logo is visible in the bottom left corner.

Select the desired option, then select **Next** to continue.

The installer displays the administration user passwords configuration screen.



## Set the Administrator Passwords

The base administrative repository named SYSTEM includes two administrative user definitions: Super Admin and Super Support. Specify a password for each of these user definitions.

**ORACLE Knowledge** **Set Administration User Passwords**

This installation process will create a base administrative repository named SYSTEM if you selected to create the database. The SYSTEM repository includes two administration user definitions: Super Admin and Super Support.

**Password for User: SUPER**

\*\*\*\*\*

**Re-enter Password for User: SUPER**

\*\*\*\*\*

**Password for User: SUPPORT**

\*\*\*\*\*

**Re-enter Password for User: SUPPORT**

\*\*\*\*\*

InstallAnywhere

Cancel Previous Next

Enter passwords for SUPER and SUPPORT administrators. Note the new passwords.

Select **Next** to continue.

If you use WebLogic Server, the installer displays the screens to **Configure the Application Server**.

If you use Apache Tomcat Server, the installer displays the **Configure Access to Information Manager** screen.

## Configure the Application Server

The installer collects various parameters about your application server environment.

### Specify the Java Options

Specify the Java Home, memory allocation arguments, and the garbage collection tuning argument.

**ORACLE Knowledge** **Specify Java Options**

- ☒ Introduction
- ☒ Choose IM Admin Apps
- ☒ Select CRM System
- ☒ Choose Web Apps
- ☒ Choose Install Folder
- ☐ Choose Instance Name
- ☐ Set Keystore Location
- ☐ Set Database Parameters
- ☐ Create Database?
- ☐ Set Admin Passwords
- ☐ Set Configuration Values
- ☐ Configure File Transfer
- ☐ Configure Web Apps
- ☐ Select Analytics Option
- ☐ Choose Shortcut Folder
- ☐ Pre-Installation Summary
- ☐ Installing...
- ☐ Installation Complete

**Java Home used by Tomcat (Specify the parent directory of the JDK's bin directory)**

**Memory Allocation Pool Initial Size (-Xms in Megabytes)**

**Memory Allocation Pool Maximum Size (-Xmx in Megabytes)**

**Maximum Permanent Generation Size (-XX:MaxPermSize in Megabytes)**

InstallAnywhere

Enter the following parameters:

| Option                                 | Description                                                                                                                                                               |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Java Home used by [application server] | Specify the parent directory of the JDK's bin directory (for example, /usr/lib/jvm/java-1.6.0). This must be the same JAVA_HOME directory used by the application server. |
| Memory Allocation Pool Initial Size    | Specify the -XmsnM argument, where <i>n</i> is a number of megabytes. The default value is 2800.                                                                          |
| Memory Allocation Pool Maximum Size    | Specify the -XmxnM argument, where <i>n</i> is a number of megabytes. The default value is 2800.                                                                          |
| Maximum Permanent Generation Size      | Specify the -XX:MaxPermSize=nM argument, where <i>n</i> is a number of megabytes. The default value is 256.                                                               |

Select **Next** to continue.

The installer displays the WebLogic middleware home installation directory screen.

## Choose the WebLogic Middleware Home Installation Directory

The screenshot shows the 'Choose WebLogic Install Directory' window. On the left is a vertical list of installation steps, with 'Set Keystore Location' highlighted. The main area contains a text box for the directory path, a 'Please Choose a Folder:' label, and a text input field containing '/scratch/qagroup/apps/Weblogic'. Below the input field are 'Restore Default Folder' and 'Choose...' buttons. At the bottom are 'Cancel', 'Previous', and 'Next' buttons.

**ORACLE Knowledge**

**Choose WebLogic Install Directory**

Introduction  
Choose IM Admin Apps  
Select CRM System  
Choose Web Apps  
Choose Install Folder  
Choose Instance Name  
Set Keystore Location  
Set Database Parameters  
Create Database?  
Set Admin Passwords  
Set Configuration Values  
Configure File Transfer  
Configure Web Apps  
Select Analytics Option  
Choose Shortcut Folder  
Pre-Installation Summary  
Installing...  
Installation Complete

Please enter the directory configured as Middleware\_Home (for Weblogic 11g) or Oracle\_Home (for Weblogic 12c).

**Please Choose a Folder:**

/scratch/qagroup/apps/Weblogic

Restore Default Folder Choose...

InstallAnywhere

Cancel Previous Next

Select the root directory in which WebLogic Middleware is installed (for example, <weblogic\_dir>/<Middleware\_Home>).

Select **Next** to continue.

The installer displays the WebLogic server installation directory screen.

## Choose the WebLogic Server Installation Directory

**ORACLE Knowledge**

- Introduction
- Choose IM Admin Apps
- Select CRM System
- Choose Web Apps
- Choose Install Folder
- Choose Instance Name
- Set Keystore Location
- Set Database Parameters
- Create Database?
- Set Admin Passwords
- Set Configuration Values**
- Configure File Transfer
- Configure Web Apps
- Select Analytics Option
- Choose Shortcut Folder
- Pre-Installation Summary
- Installing...
- Installation Complete

**Choose the WebLogic Server Install Directory**

Please choose the directory in which WebLogic Server is installed.

**Please Choose a Folder:**

/scratch/qagroup/apps/Weblogic/wlserver\_10.3

Restore Default Folder Choose...

InstallAnywhere

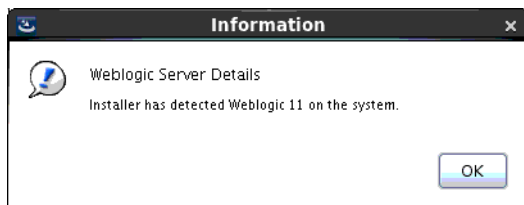
Cancel Previous Next

Select the root directory in which WebLogic Server is installed (for example, <weblogic\_dir>/Weblogic/wlserver\_10.3).

Use the **Choose** option to open a file explorer and select an alternate location. Use the **Restore Default Folder** option to reset the default installation directory, if necessary.

Select **Next** to continue.

The installer confirms the WebLogic installation directory and displays an confirmation screen.



Select **OK** to continue.

The installer displays the **Choose a WebLogic Domain** screen.

## Choose a WebLogic Domain

Specify the name and location of your WebLogic domain where the Oracle Knowledge applications is to be installed.

**ORACLE Knowledge** Choose a WebLogic Domain

Please specify the name and location of your WebLogic Domain where the Oracle Knowledge Applications will be installed.

**WebLogic Domain Name**  
base\_domain

**WebLogic Domain Path**  
r/Oracle/Middleware/user\_projects/domains/base\_domain

Restore Default Choose...

Cancel Previous Next

Enter the following information:

| Property             | Description                                                                                                                                                                                                                               |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| WebLogic Domain Name | The name of the WebLogic domain. For example, base_domain.                                                                                                                                                                                |
| WebLogic Domain Path | The full path to the WebLogic domain. The name of the WebLogic domain is added to the domains or user_projects folder under the WebLogic installation folder. For example, <weblogic_dir>/Middleware/user_projects/domains/<domain_name>. |

Select **Next** to continue.

The installer displays the WebLogic administrator credentials configuration screen.

## Set the WebLogic Administrator Credentials

Provide the credentials to the administration server of the specified WebLogic domain.

**ORACLE Knowledge** **Set WebLogic Administrator Credentials**

Please provide the credentials to the administration server of the specified domain.

**Administrator User Name**  
weblogic

**Administrator User Password**  
.....

**Re-enter Administrator User Password**  
.....

**Administration Server URL**  
t3://slc03jtt:7001

InstallAnywhere

Cancel Previous Next

Enter the following:

| Property                    | Description                                                                                                                                |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Administrator User Name     | Specify the user name of the user used to boot the administration server. This user should already be created in WLS.                      |
| Administrator User Password | Specify the password of the user used to boot the administration server.                                                                   |
| Administration Server URL   | Specify the <protocol>://<listen address>:<listen port> used to connect to the administration server.<br>For example, t3://localhost:7001. |

Select **Next** to continue.

The installer displays the create managed server configuration screen.



## Create a New Managed Server (Oracle WebLogic Server)

The installation process deploys the Information Manager application(s) to a managed server in your WebLogic domain. This can be an existing managed server or the installation process can create a new managed server. We recommend to create a new managed server for the IM application components.

The screenshot shows the 'Create a New Managed Server?' dialog box from the Oracle Knowledge installer. On the left is a vertical list of installation steps, each with a circular progress indicator. The steps are: Introduction, Choose IM Admin Apps, Select CRM System, Choose Web Apps, Choose Install Folder, Choose Instance Name, Set Keystore Location, Set Database Parameters, Create Database?, Set Admin Passwords, Set Configuration Values (highlighted with a yellow arrow), Configure File Transfer, Configure Web Apps, Select Analytics Option, Choose Shortcut Folder, Pre-Installation Summary, Installing..., and Installation Complete. The main area of the dialog contains the text: 'The installation process will deploy the Information Manager application(s) to a managed server in your WebLogic Domain. This can be an existing managed server or the installation process can create a new managed server.' Below this text is a question: 'Do you want the installation process to create a new'. There are two radio buttons: 'Yes' (which is selected) and 'No'. At the bottom of the dialog are three buttons: 'Cancel', 'Previous', and 'Next'. The 'Next' button is highlighted with a blue border.

**ORACLE Knowledge** **Create a New Managed Server?**

Introduction  
Choose IM Admin Apps  
Select CRM System  
Choose Web Apps  
Choose Install Folder  
Choose Instance Name  
Set Keystore Location  
Set Database Parameters  
Create Database?  
Set Admin Passwords  
Set Configuration Values  
Configure File Transfer  
Configure Web Apps  
Select Analytics Option  
Choose Shortcut Folder  
Pre-Installation Summary  
Installing...  
Installation Complete

The installation process will deploy the Information Manager application(s) to a managed server in your WebLogic Domain. This can be an existing managed server or the installation process can create a new managed server.

Do you want the installation process to create a new

☒ Yes  
☐ No

Cancel Previous Next

Select **Yes** if you want the installation process to create a new managed server. Select **No** if you plan to provide an existing managed server in the domain.

Select **Next** to continue.

The installer displays the managed server configuration screen.

## Set Managed Server Values (Oracle WebLogic Server)

If you have selected to create a new managed server, the installer uses the credentials of the administration server to boot the new managed server. The new managed server must be associated with a machine. The installation process can create a value for a new machine or you can provide the name of an existing machine in your domain.

**ORACLE Knowledge** **Set Managed Server Values**

- ☒ Introduction
- ☒ Choose IM Admin Apps
- ☒ Select CRM System
- ☒ Choose Web Apps
- ☒ Choose Install Folder
- ☒ Choose Instance Name
- ☒ Set Keystore Location
- ☒ Set Database Parameters
- ☒ Create Database?
- ☒ Set Admin Passwords
- ☒ **Set Configuration Values**
- ☐ Configure File Transfer
- ☐ Configure Web Apps
- ☐ Select Analytics Option
- ☐ Choose Shortcut Folder
- ☐ Pre-Installation Summary
- ☐ Installing...
- ☐ Installation Complete

**Managed Server Name**  
InfoManager\_Server

**Listen Address**  
slc03jtt

**Listen Port**  
8226

**Machine Name**  
InfoManager\_Machine

**Is this an existing machine in your domain?**  
☐ Yes  
☒ No

InstallAnywhere

Cancel Previous Next

Specify the following properties:

| Property                                    | Description                                                                                                                                                                           |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Managed Server Name                         | The name of the new managed server. The name must be unique to your domain.                                                                                                           |
| Listen Address                              | The listen address of the new managed server. The default value is the local address of the machine running the installer.                                                            |
| Listen Port                                 | The listen port of the new managed server. The default value is 8226.                                                                                                                 |
| Machine Name                                | The name of the machine in the domain that the new managed server is to be associated with. If this is a new machine, make sure that the name is unique to your domain.               |
| Is this an existing machine in your domain? | Select <b>Yes</b> if you are providing the name of an existing machine in your domain. Select <b>No</b> if you want the installer to create a value for a new machine with this name. |



If you select to provide an existing managed server, the installer uses the credentials provided to boot the managed server. If credentials for the managed server are not set, leave the User Name and User Password fields blank and the credentials of the administration server are used to boot the managed server.

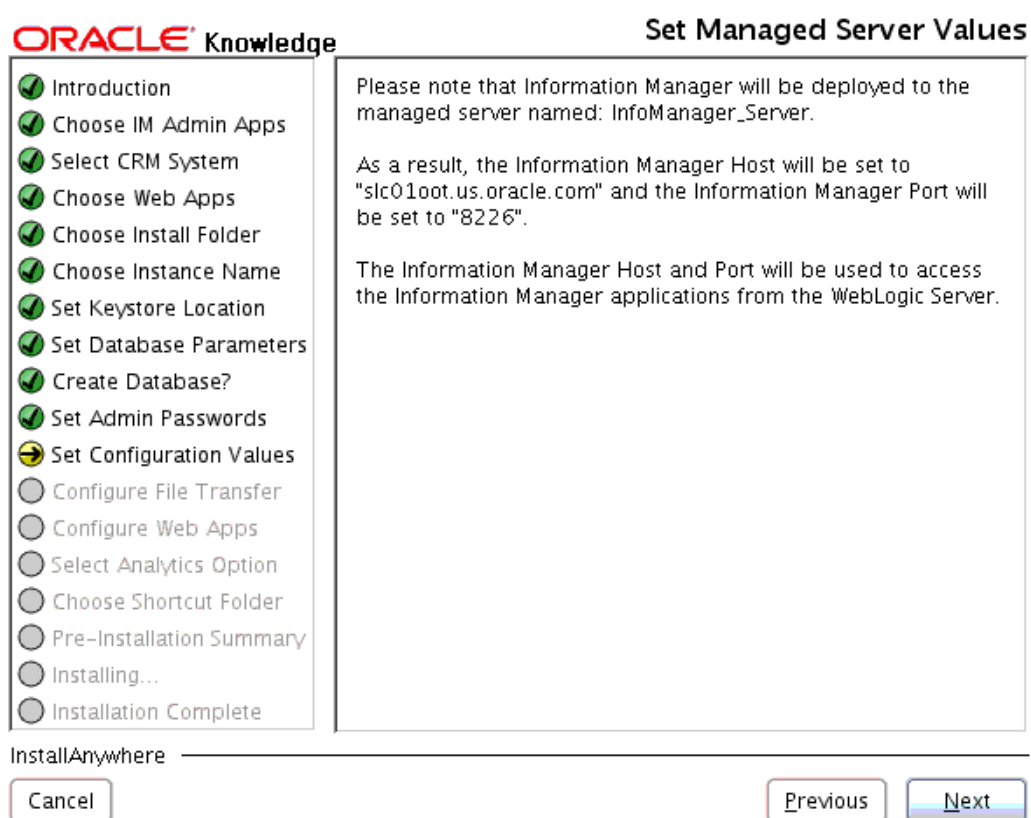
Specify the following properties:

| Property            | Description                                                 |
|---------------------|-------------------------------------------------------------|
| Managed Server Name | The name of the existing managed server.                    |
| Listen Address      | The listen address of the existing managed server.          |
| Listen Port         | The listen port of the existing managed server.             |
| User Name           | The user name of the user used to boot this managed server. |
| User Password       | The password of the user used to boot this managed server.  |

**Note:** Information Manager is deployed to the specified managed server. As a result the Information Manager Host is set to the managed server listen address and the Information Manager Port is set to the listen port. The Information Manager Host and Port are used to access the Information Manager applications for the WebLogic Server

Select **Next** to continue.

The installer displays the Set Managed Server Values confirmation screen, restating the IM host/port.



Select **Next** to continue.

The installer displays the screen to configure access to Information Manager.

## Configure Access to Information Manager

Specify the URL to access the Information Manager Management Console. The URL configuration property is stored in the <Oracle\_Knowledge\_home>/InfoManager/config/SYSTEM/config.properties after the installation has been completed successfully.

**Note:** If you did not select to install an IM Console on this instance, provide the URL to access an existing IM Console instance.

**ORACLE Knowledge** **Configure Access to Information Manager**

☒ Introduction  
☒ Choose IM Admin Apps  
☒ Select CRM System  
☒ Choose Web Apps  
☒ Choose Install Folder  
☒ Choose Instance Name  
☒ Set Keystore Location  
☒ Set Database Parameters  
☒ Create Database?  
☒ Set Admin Passwords  
☒ **Set Configuration Values**  
☐ Configure File Transfer  
☐ Configure Web Apps  
☐ Select Analytics Option  
☐ Choose Shortcut Folder  
☐ Pre-Installation Summary  
☐ Installing...  
☐ Installation Complete

Please specify the hostname and port for the Information Manager application server and the URL to access the Information Manager Management Console.

Note: If you did not select to install an IM Console on this instance, provide the URL to access an existing IM Console

**Information Manager Host**

**Information Manager Port**

**Management Console URL**

InstallAnywhere

Specify the appropriate values for the following parameter:

| Property               | Description                                                                                                        |
|------------------------|--------------------------------------------------------------------------------------------------------------------|
| Management Console URL | Specify the URL for the Management Console. Default is<br>http://<Information_Manager_Host>:<IM_Port>/InfoManager. |

Select **Next** to continue.

The installer displays the email server configuration screen.

## Configure Email Properties

Specify the hostname of the email server for your organization and an Information Manager administrator email address. Specify whether or not the SMTP server requires authentication, and if so, provide the credentials Information Manager should use to send email. The email configuration properties are stored in the <Oracle\_Knowledge\_home>/InfoManager/config/SYSTEM/config.properties file after the installation has been completed successfully.

**ORACLE Knowledge** Specify Email Configuration

☒ Introduction  
☒ Choose IM Admin Apps  
☒ Select CRM System  
☒ Choose Web Apps  
☒ Choose Install Folder  
☒ Choose Instance Name  
☒ Set Keystore Location  
☒ Set Database Parameters  
☒ Create Database?  
☒ Set Admin Passwords  
☒ **Set Configuration Values**  
☐ Configure File Transfer  
☐ Configure Web Apps  
☐ Select Analytics Option  
☐ Choose Shortcut Folder  
☐ Pre-Installation Summary  
☐ Installing...  
☐ Installation Complete

Please specify the hostname of the email server for your organization and an Information Manager administrator email address. Specify whether or not the SMTP server requires authentication, and if so, provide the credentials Information Manager should use to send emails.

**SMTP Host**

**Administrator Email Address**

☐ Requires SMTP Authentication

**SMTP User Name**

**SMTP Password**

InstallAnywhere

Specify the following properties:

| Property                     | Description                                                                       |
|------------------------------|-----------------------------------------------------------------------------------|
| SMTP Host                    | Specify the hostname of the email server to use for email-related functions.      |
| Administrator Email Address  | Specify the email address for the Information Manager administrator.              |
| Requires SMTP Authentication | Specify whether or not the SMTP server requires authentication.                   |
| SMTP User Name               | Specify the user name to be used when authenticating requests to the SMTP server. |
| SMTP Password                | .Specify the password to be used when authenticating requests to the SMTP server. |

Select **Next** to continue. If you use WebLogic Server, the installer displays **Configure the Resource Web Application (Oracle WebLogic Server)**. If you use Apache Tomcat Server, the installer displays the **Configure a Local File System Content Resource Store** screens.

## Configure the Resource Web Application (Oracle WebLogic Server)

The installer prompts you to choose the Web application context name that is used to serve the content resources for the production instance. These content resources include document attachments to Information Manager content records as well as image uploads to the rich text editors used for composing content records and discussion messages.

**ORACLE Knowledge**

**Configure Resource Web Application**

- ☒ Introduction
- ☒ Choose IM Admin Apps
- ☒ Select CRM System
- ☒ Choose Web Apps
- ☒ Choose Install Folder
- ☒ Choose Instance Name
- ☒ Set Keystore Location
- ☒ Set Database Parameters
- ☒ Create Database?
- ☒ Set Admin Passwords
- ☒ Set Configuration Values
- ☒ **Configure File Transfer**
- ☐ Configure Web Apps
- ☐ Select Analytics Option
- ☐ Choose Shortcut Folder
- ☐ Pre-Installation Summary
- ☐ Installing...
- ☐ Installation Complete

Choose the web application context name that will be used to serve resources from the content resource mount point. This application will be placed under /scratch/qauser/Oracle2/Knowledge/IM/instances/InfoManager/webapps/.

**Context Name**  
OKResources

InstallAnywhere

Cancel Previous Next

Specify the application context name.

The default name is OKResources. This application is placed under <Oracle\_Knowledge\_home>/instances/<Instance\_Name>/webapps and deployed to the managed server in your domain.

**Note:** Be sure that the specified context name is a unique deployment name in your domain to avoid duplicate deployment errors.

Select **Next** to continue.

The installer displays the content resource mount point directory configuration screen.

## Configure a Local File System Content Resource Store

### Specify the Content Resource Mount Point

The installer prompts you to configure a local directory referred to as the content resource mount point for Information Manager storage of, and access to content resources for the production instance. These content resources include document attachments to content records.

Specify the full path to a directory on the local file system for the location of file attachments.

The specified location must be accessible to the Oracle Knowledge application server, and the application server must have READ and WRITE permissions to the directory. If using a shared storage area on Linux, mapped drives need to be NFS mounted. If using a shared storage area on Windows, the application user must have permissions to login as a service and must have the appropriate network privileges. In addition, the UNC naming convention must be used when mapping the drive (e.g. \\Server\_Name\\Shared\_Folder).

On WebLogic, the default location is <Oracle\_Knowledge\_home>/instances/<Instance\_Name>/webapps/<Context Name>/apps/resources.

On Apache Tomcat, the default location is <Oracle\_Knowledge\_home>/instances/<Instance\_Name>/appserverim/webapps/ROOT/resources

This directory also contains the content\_xxxxx.xml files for the content crawler. The directory structure specified is appended to in order to create the correct path. This physical path must be available via URL in order for the IM content crawler from Search to index the IM repository.

**ORACLE Knowledge** Set the Content Resource Mount Point

- Introduction
- Choose IM Admin Apps
- Select CRM System
- Choose Web Apps
- Choose Install Folder
- Choose Instance Name
- Set Keystore Location
- Set Database Parameters
- Create Database?
- Set Admin Passwords
- Set Configuration Values
- Configure File Transfer**
- Configure Web Apps
- Select Analytics Option
- Choose Shortcut Folder
- Pre-Installation Summary
- Installing...
- Installation Complete

Choose the folder on the local file system where attached files are to be stored. This directory will also contain the content\_xxxxx.xml files for the content crawler. This directory will need to be visible via the web server to serve the files. It must have READ-WRITE access. The directory structure specified will be appended to in order to create

**Please Choose a Folder:**

stances/InfoManager/appserverim/webapps/ROOT/resources

Restore Default Folder Choose...

InstallAnywhere

Cancel Previous Next



**Note:** If you specify a directory that does not exist, the installation process automatically creates the directory.

Select **Next** to continue.

The installer displays the content resource URL configuration screen.

## Configure the Content Resource URL

Specify a URL for the local directory that you specified as the content resource store. The default URL is `http://<Information_Manager_Host>:<Information_Manager_Port>/<Resource_Directory_Name>`.

Specify the URL that corresponds to the local directory specified as the content resource location. Information Manager uses the URL to read (retrieve) documents attached to content records in the production environment.

**ORACLE Knowledge** **Configure Resource URL**

- ☒ Introduction
- ☒ Choose IM Admin Apps
- ☒ Select CRM System
- ☒ Choose Web Apps
- ☒ Choose Install Folder
- ☒ Choose Instance Name
- ☒ Set Keystore Location
- ☒ Set Database Parameters
- ☒ Create Database?
- ☒ Set Admin Passwords
- ☒ Set Configuration Values
- ☒ **Configure File Transfer**
- ☐ Configure Web Apps
- ☐ Select Analytics Option
- ☐ Choose Shortcut Folder
- ☐ Pre-Installation Summary
- ☐ Installing...
- ☐ Installation Complete

**Full URL to files stored on Content Resource Mount Point. This parameter MUST point to the same location as the Content Resource Mount Point via HTTP. This is where the LIVE content is stored.**

InstallAnywhere

Select **Next** to continue.

The installer prompts you to configure any Web applications you have decided to install, as described in the topics that follow.

If you have not chosen any Web applications, then the installer prompts you to activate Oracle Knowledge Analytics logging (go to “Activate Analytics Logging” on page 119).

## Configure the Web Applications

This section describes a set of screens that allow you to configure any Web applications you have decided to install. There are three configuration steps:

- 1 “Configure the IM Console Instance to Run Batch Jobs” on page 115 (available only if IM Console is selected).
- 2 “Select the Folder Containing the CRMOD Integration Configuration Files (SSP Only)” on page 116 (available only if SSP is selected).
- 3 “Specify the Web Applications Information Manager Repository” on page 118.

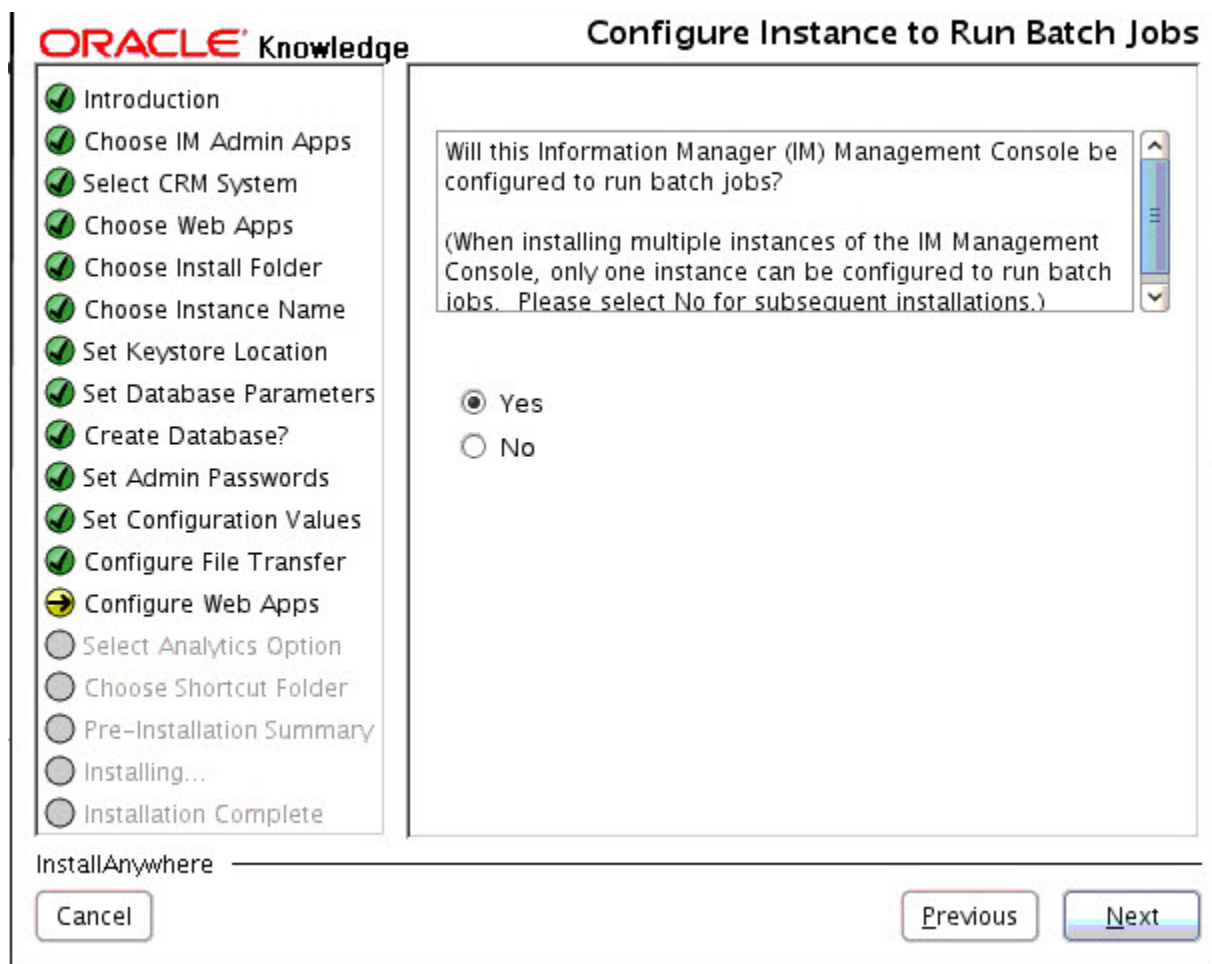
### Configure the IM Console Instance to Run Batch Jobs

If you selected to install the IM Console Web application, the installer displays the Configuring Instance to Run Batch Jobs screen. The IM Console has the ability to run jobs, or processes, that maintain the Repository's data through a scheduling service. If you select **Yes**, then the installed IM Console instance can run these jobs and add and remove Repositories.

Specify whether this IM Console is configured to run batch jobs.

**Note:** If you are installing multiple instances of the IM Console, only one should be configured to run batch jobs, in order to maintain the integrity of the job scheduler.

For the initial installation, we recommend that you maintain the preselected value of **Yes** and use this instance to add and remove Repositories. For subsequent installations, it is strongly recommend to select **No**; then the ability to add and remove Repositories is disabled for these instances.



Select **Next** to continue.

If other Web applications are selected, the installer displays the Web application configuration screens. If not, the installer prompts you to activate Oracle Knowledge Analytics logging (go to “Activate Analytics Logging” on page 119).

## Select the Folder Containing the CRMOD Integration Configuration Files (SSP Only)

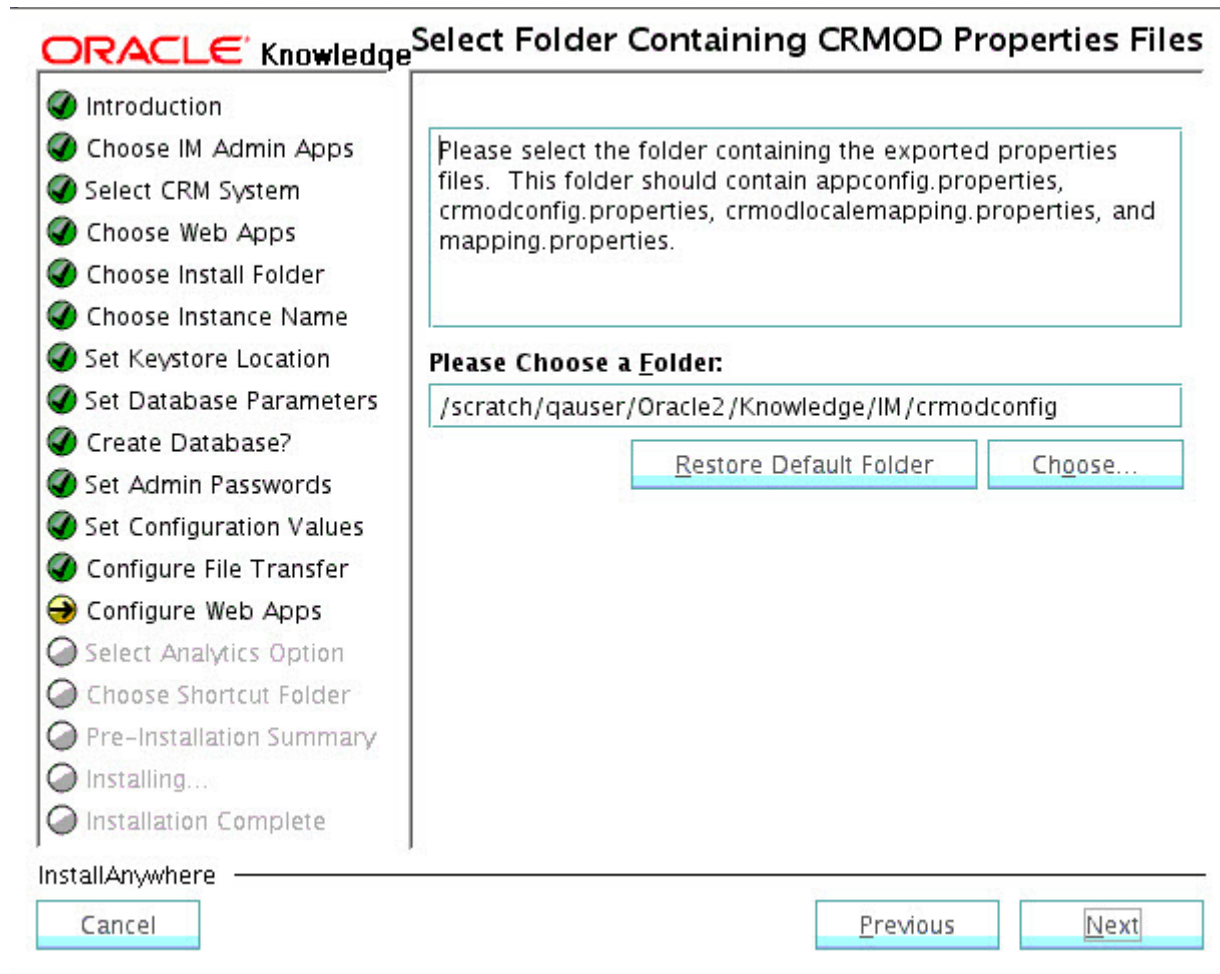
Select the folder containing the exported CRMOD integration configuration properties files. The specified folder should contain the following:

- appconfig.properties
- crmodconfig.properties
- crmodlocalemapping.properties
- mapping.properties

Select **Choose** to open a file browser and select the folder containing the exported properties files. Use the **Restore Default Folder** option to reset the default installation directory, if necessary.

**Note:** This screen is available only if SSP is marked for installation.





Select **Next** to continue.

The installer displays the **Specify Web Apps IM Repository** screen.

**Note:** This screen is available only if SSP is marked for installation. If you did not select SSP for installation, the installer displays “Activate Analytics Logging” on page 119

## Specify the Web Applications Information Manager Repository

**Note:** This screen only appears when you have selected integration Web applications to install.

Specify the reference key of the Information Manager repository for the Web applications. This repository must be created prior to installing the InfoCenter based web applications.

The screenshot shows the 'Specify Web Apps IM Repository' window. On the left is a vertical list of installation steps, each with a circular icon. Steps 1 through 15 are marked with green checkmarks, indicating they are completed. Step 16, 'Configure Web Apps', is marked with a yellow warning icon. Steps 17 through 20 are marked with grey circles, indicating they are not yet completed. The steps are: Introduction, Choose IM Admin Apps, Select CRM System, Choose Web Apps, Choose Install Folder, Choose Instance Name, Set Keystore Location, Set Database Parameters, Create Database?, Set Admin Passwords, Set Configuration Values, Configure File Transfer, Configure Web Apps, Select Analytics Option, Choose Shortcut Folder, Pre-Installation Summary, Installing..., and Installation Complete. The main area of the window has a title bar 'Specify Web Apps IM Repository'. Below the title bar is a text box with the instruction: 'Please specify the reference key of the IM repository that the webapps will be associated with.' Below this text box is a label 'IM Repository Reference Key' followed by a text input field containing the value 'SYSTEM'. At the bottom of the window are three buttons: 'Cancel', 'Previous', and 'Next'. The 'Next' button is highlighted with a blue border.

**ORACLE Knowledge**

**Specify Web Apps IM Repository**

Please specify the reference key of the IM repository that the webapps will be associated with.

**IM Repository Reference Key** SYSTEM

InstallAnywhere

Cancel Previous Next

Select **Next** to continue.

The installer prompts you to **Activate Analytics Logging**.

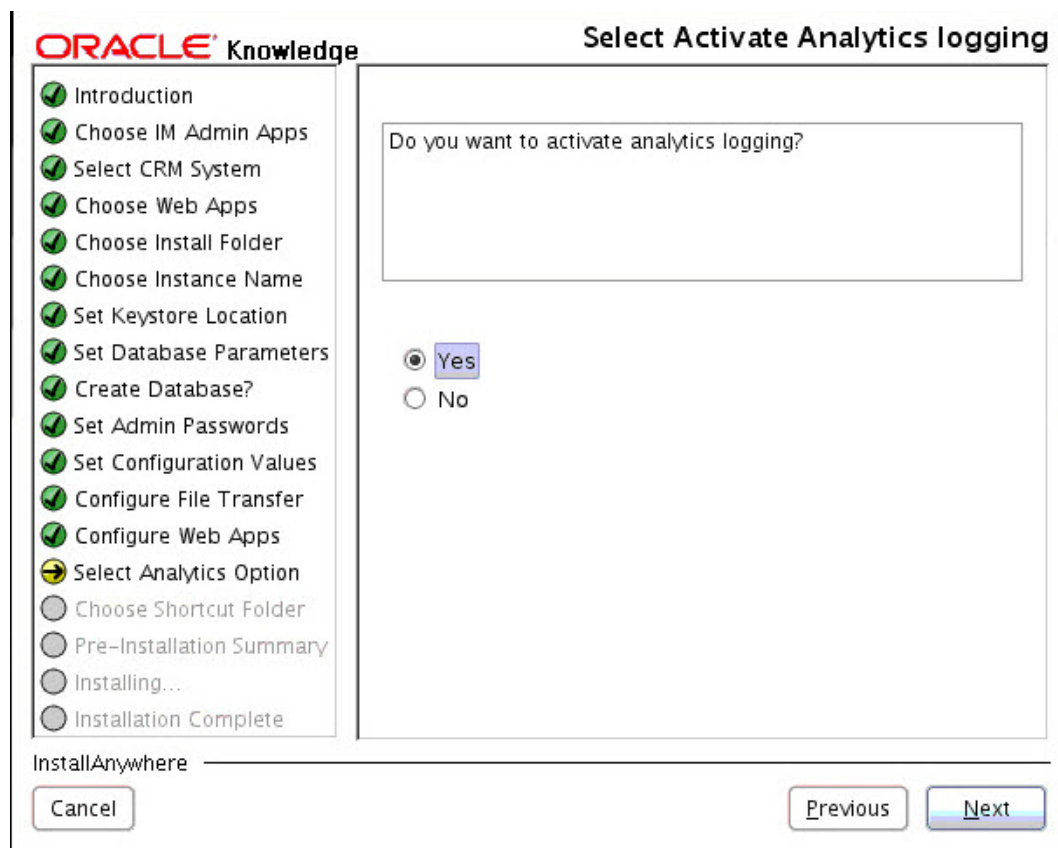
## Configure Analytics Logging

The installer displays:

- **Activate Analytics Logging**
- **Configure the JMS Queue for Oracle Knowledge Analytics Logging**

### Activate Analytics Logging

The Select Activate Analytics logging screen prompts you to activate Oracle Knowledge Analytics logging.



Select **Yes** to display the **Configure the JMS Queue for Oracle Knowledge Analytics Logging** screen.

Select **No** only if you are not planning to install Oracle Knowledge Analytics. The installer displays **Select Shortcut Options (Windows)** or **Review Installation Values** (Linux).

### Configure the JMS Queue for Oracle Knowledge Analytics Logging

The Select Activate Analytics logging screen prompts you to activate Oracle Knowledge Analytics logging by configuring a JMS queue. Oracle Knowledge Analytics product uses this JMS queue to obtain application data for reporting purposes.

**ORACLE Knowledge** **Set JMS Queue Parameters**

Introduction  
 Choose IM Admin Apps  
 Select CRM System  
 Choose Web Apps  
 Choose Install Folder  
 Choose Instance Name  
 Set Keystore Location  
 Set Database Parameters  
 Create Database?  
 Set Admin Passwords  
 Set Configuration Values  
 Configure File Transfer  
 Configure Web Apps  
**Select Analytics Option**  
 Choose Shortcut Folder  
 Pre-Installation Summary  
 Installing...  
 Installation Complete

Please enter the JMS queue information. This information will be used to publish search events to JMS queue.

JMS Queue URL  
 t3://slc03jtt:7002

JMS Queue User

JMS Password

Re-enter JMS Password

JMS Factory Name  
 jms/AnalyticsConnectionFactory

JMS Queue Name  
 jms/AnalyticsQueue

InstallAnywhere

Cancel Previous Next

Select **Yes** to configure the JMS queue.

**Note:** Select **No** only if you are not planning to install the Analytics package.

The installer prompts you for the following JMS queue values:

| Property         | Description                                                                                                                                                                                   |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| JMS Queue URL    | Specify the URL to the WebLogic Server that is serving the queue.<br>For example: t3://<listen address>:<listen port><br><b>Note:</b> The URL must contain the host name of the queue server. |
| JMS Queue User   | Specify the user ID for the WebLogic console/domain where the queue is configured.                                                                                                            |
| JMS Password     | Specify the password for the WebLogic console/domain where the queue is configured.                                                                                                           |
| JMS Factory Name | Specify a JMS factory name or use the default name:<br>jms/AnalyticsConnectionFactory.                                                                                                        |
| JMS Queue Name   | Specify a JMS factory name or use the default name: jms/AnalyticsQueue.                                                                                                                       |

Select **Next** to continue. On Linux, the installer displays **Review Installation Values**.

On Windows, the installer displays **Select Shortcut Options (Windows)**.

## Select Shortcut Options (Windows)

Select the location in which you want to create shortcuts or links to Oracle Knowledge. If the installer locates an existing Oracle Knowledge program group on Windows, then it uses that group as the default. If the installer does not locate an existing Oracle Knowledge program group, then it creates a new program group.

On Windows, you can specify:

- To create an alternate new program group in which the shortcuts are created
- To create no Oracle Knowledge icons
- To create shortcuts in an alternate existing program group
- To create icons for All Users
- To place Oracle Knowledge icons in the Start Menu, on the Desktop, or the Quick Launch Bar for the current user or for all users
- To create Oracle Knowledge icons in another location

Select the desired product icon locations.

Select **Next** to continue.

The installer displays the preinstallation summary screen.

## Review Installation Values

The preinstallation summary screen displays a summary of your installation selections, as well as disk space information, prior to transferring the product files from the distribution.

Review your selections.

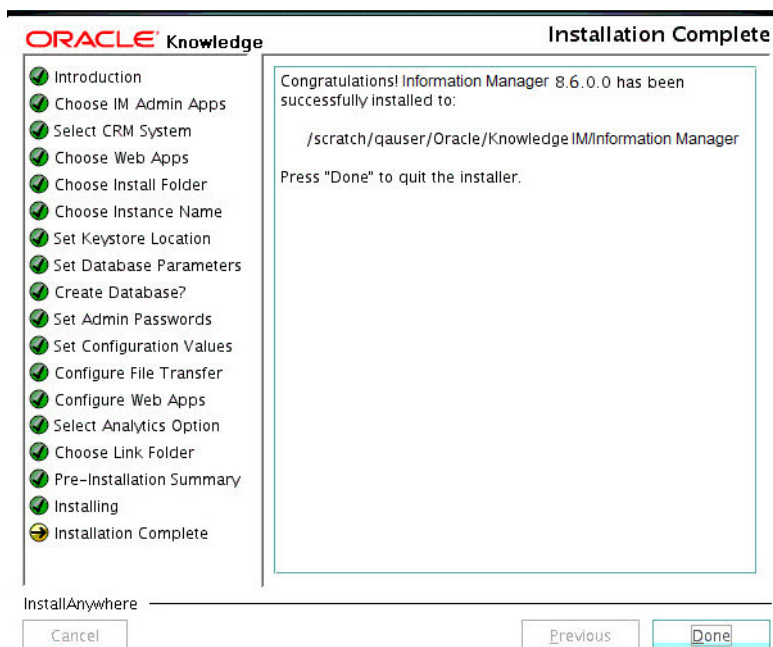
Select **Previous** to make any corrections.

Select **Install** to continue.

The installer begins installing Information Manager in the specified location.

## Complete the Information Manager Installation

The completion screen summarizes the installation process.



The Information Manager component directories and files are now installed in the specified location.

Select **Done** to exit the installer.

The installer executes its cleanup routines and terminates.

After completing the stand-alone installation process on Windows 2008, the user must take ownership for the Oracle Knowledge installation directory, subdirectories, and objects.

The user must also have Full control permission on this directory.

The Common Environment window must be started as an administrator in order to install, uninstall, stop, or start the Information Manager service.

If you are using WebLogic, you must first start Information Manager. (To install Information Manager as a service or daemon process, see “Restart the Information Manager Service” on page 124.)

(Windows only) The installer installs the Information Manager service for you.

## Starting Information Manager from the WebLogic Administration Console

To start Oracle Knowledge Information Manager from the WebLogic Administration Console, see the instructions in “Start Oracle Knowledge on WebLogic Server” on page 38

## WebLogic Start-up Script

You can use a WebLogic start-up script to start the managed server. The `startManagedWeblogic.sh|cmd` script is provided to allow WebLogic users the ability to monitor the managed servers within Oracle Process Manager and Notification Server (OPMN) or some other monitoring service not provided with Oracle Knowledge.

To generate the start-up script:

- 1 Open a command prompt and cd into `$Oracle Knowledge_ROOT/instances/<Instance_Name>`, where `<Instance_Name>` refers to the Information Manager instance name on this installation.
- 2 On Windows, execute `setenv.bat` to open the Common Environment. On Linux, execute `createStartupScript.sh`. On Windows, execute `createStartupScript`.  
The WebLogic start managed server script is generated to `$Oracle Knowledge_ROOT/instances/<Instance_Name>`. On Linux, the script is `startManagedWebLogic.sh`. On Windows, the script is `startManagedWebLogic.cmd`. Execute the script outside of the Common Environment to start the managed server.

## Installing the Information Manager Service (Windows)

When you install and configure Oracle Knowledge and Information Manager, the installer places Common Environment items in the Windows Start menu for each defined instance if product icons were selected to be installed.

To install the Information Manager service on Windows:

- 1 Select the Common Environment item for the desired instance:  
Start > All Programs > Oracle Knowledge IM > `<instance_name>` (default) Environment  
– or –  
If no product icons were installed, open a command prompt and cd into `<Oracle_Knowledge_home>/instances/<Instance_Name>` where `<Instance_Name>` refers to the Information Manager instance name on this installation. Execute `setenv.bat` to open the Common Environment.
- 2 Install the Information Manager service by executing the following command in the Common Environment:  

```
inquiraimservice -install
```

  
You can uninstall the Information Manager service by executing the following command in the Common Environment:  

```
inquiraimservice -uninstall
```

## Starting Information Manager from ICE

You can use the WebLogic Administration Console to start the managed server. See “Start Oracle Knowledge on WebLogic Server” on page 38 for more information.

You start the Oracle Knowledge service from the Common Environment command prompt for the related instance.

Starting Information Manager from ICE:

- 1 Open a command prompt and cd into `<InfoManager_install_home>/instances/<Instance_Name>`, where `Instance_Name` refers to the Information Manager instance name on this installation.
- 2 On Linux, execute `setenv.sh` to open the Common Environment.



On Windows, execute `setenv.bat` to open the Common Environment.

- 3 On Linux enter: `inquiraim.sh start`, to start the Oracle Knowledge service.  
On Windows, enter: `inquiraim start`, to start the Oracle Knowledge service.

**Note:** On Windows 2008, to install, uninstall, stop, and start Oracle Knowledge services, you must execute the Common Environment window using the Run as Administrator option.

The Oracle Knowledge service starts.

You can use the command `inquiraim.sh stop` to stop the service on Linux or `inquiraim stop` to stop the service on Windows.

The Information Manager managed servers can also be started and stopped from the WebLogic Management Console. See “Start Oracle Knowledge on WebLogic Server” on page 38 for more information.

You can now access the Management Console application, as described in “Access the Management Console” on page 126.

## Restart the Information Manager Service

You must restart the Information Manager service to apply your configuration changes to the Information Manager Web applications.

The Common Environment window must be started as an administrator in order to install, uninstall, stop, or start Oracle Knowledge services.

### Restart Information Manager (Linux)

To restart the Information Manager service on Linux:

- 1 Open a command prompt and `cd` into `<Oracle_Knowledge_home>/instances/<Instance_Name>`, where `<Instance_Name>` refers to the Information Manager instance name on this installation. Execute `setenv.sh` to open the Common Environment.
- 2 Restart the Information Manager instance by executing the following commands in the Common Environment:

```
inquiraim.sh restart
```

The Oracle Knowledge service starts.

You can use the command `inquiraim.sh stop` to stop the service.

**Note:** The commands `inquiraim.sh/inquiraim restart` and `inquiraim.sh/inquiraim stop` can only be executed successfully when the application is started by executing the `inquiraim.sh start` and `inquiraim start` commands.

### Restart Information Manager (Windows)

When you install and configure Oracle Knowledge and Information Manager, the installer places Common Environment items in the Windows Start menu for each defined instance if product icons were selected to be installed.

To restart the Information Manager service on Windows:



- 1 Select the Common Environment item for the desired instance:

Start > All Programs > Oracle Knowledge IM > <application\_name> (default) Environment

– or –

If no product icons were installed, open a command prompt and cd into

<Oracle\_Knowledge\_home>/instances/<Instance\_Name> where <Instance\_Name> refers to the Information Manager instance name on this installation.

Execute `setenv.bat` to open the Common Environment.

- 2 Restart the Information Manager instance by executing the following command in the Common Environment:

```
inquiraim restart
```

The Oracle Knowledge service starts.

You can use the command `inquiraim stop` to stop the service.

**Note:** The commands `inquiraim.sh/inquiraim restart` and `inquiraim.sh/inquiraim stop` can only be executed successfully when the application is started by executing the `inquiraim.sh start` and `inquiraim start` commands.

## Manage Information Manager from the Common Environment

You can manage the Information Manager application using the following Common Environment commands. You can access this environment from a Common Environment shortcut that is installed as part of the standard and stand-alone installation processes.

| Command                                   | Description                                          |
|-------------------------------------------|------------------------------------------------------|
| <code>inquiraim.sh start</code> (Linux)   | Starts the Information Manager services.             |
| <code>inquiraim start</code> (Windows)    |                                                      |
| <code>inquiraim.sh stop</code> (Linux)    | Stops the Information Manager services.              |
| <code>inquiraim stop</code> (Windows)     |                                                      |
| <code>inquiraim.sh restart</code> (Linux) | Stops and restarts the Information Manager services. |
| <code>inquiraim restart</code> (Windows)  |                                                      |

**Note:** The commands `inquiraim.sh/inquiraim restart` and `inquiraim.sh/inquiraim stop` can only be executed successfully when the application is started by executing the `inquiraim.sh start` and `inquiraim start` commands.

## Creating a Repository

Prior to installing any of the web applications (InfoCenter, iConnect, or SSP) it is necessary to create an IM repository. This section describes how to create an Information Manager repository by:

- “Access the Management Console” on page 126
- “Specify Repository Properties” on page 126.

After you create a repository, you can continue defining the various repository elements using the Management Console and Information Center, as described in the *Oracle Knowledge Information Manager Administration Guide*.

## Access the Management Console

The installation process automatically configures the Management Console for use. You can begin working with Information Manager by accessing the Management Console.

You can access the Management Console by:

- Selecting the installed shortcut (Windows only). The default shortcut location is All Programs > Oracle Knowledge IM> Information Manager.
- Navigating to the Management Console URL at `http://<host_name>:<port>/InfoManager`.

Log onto the IM Management Console using the following credentials:

- User name: `SUPER`
- Password: <The password configured during the installation process>
- Repository: `SYSTEM`

Create a repository for your application, as described in “Specify Repository Properties” on page 126.

## Specify Repository Properties

You create a repository by specifying the properties listed in this topic.

This is an optional BUT highly recommended step.

If you are creating a repository as part of the initial Information Manager configuration, you might find it convenient to complete only the required fields, then specify additional properties as needed.

| Property                                                                                 | Description                                                                                                                                                                                                                                                                                                                     |
|------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Repository Name</b>                                                                   | Specify a name for the repository.                                                                                                                                                                                                                                                                                              |
| <b>Reference Key</b>                                                                     | Accept the default value supplied by the Management Console or specify a string to use as an internal identifier. See the note on reference keys in the <i>Oracle Knowledge Information Manager Administration Guide</i> for more information on reference keys and how they are used in Information Manager.                   |
| <b>Task ID Prefix</b>                                                                    | Enter a value (character string) to be used to preface task IDs in the inbox. This prefix is used only for consistency for document IDs in the channel and has no other system meaning.                                                                                                                                         |
| <b>Filter tasks so users are only made aware of tasks matching their skill category</b>  | Specify whether to filter tasks based on the presence of category expertise information specified in user profiles. See the information about specifying Management Console user properties in the <i>Oracle Knowledge Information Manager Administration Guide</i> .                                                           |
| <b>Require at least one matching skill category from every top-level category branch</b> | Specify whether a task is assigned to a user based on the user's skills. If there are two branches (for example, Products and Departments), the user must have a user skill in both branches for the task to be assigned to him.                                                                                                |
| <b>Default Locale</b>                                                                    | Specify the locale (language) that is used as the default. The default locale is considered to be the base language for the repository. See the information about managing Information Manager applications in multiple languages in the <i>Oracle Knowledge Information Manager Administration Guide</i> for more information. |

| Property (Continued)         | Description (Continued)                                                                                                                                                                                                                                                                                                                                         |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Supported Locales</b>     | Specify optional supported locales for the repository. The default list of supported locales is defined in the System repository. You can modify the list of supported locales using the Locale Management facility, as described in the information about managing supported locales in the <i>Oracle Knowledge Information Manager Administration Guide</i> . |
| <b>Default Administrator</b> | Define a default administrator for this repository. The Information Manager adds this user as a console user having the predefined Default Administrator security role. See the information about the Information Manager users in the <i>Oracle Knowledge Information Manager Administration Guide</i> for more information on users and security roles.       |
| <b>Workflow Tasks</b>        | Specify whether to auto-assign tasks based on workflow attributes to help manage the task list and prevent tasks from being left unassigned.                                                                                                                                                                                                                    |
| <b>Translation Tasks</b>     | Specify whether to auto-assign tasks based on the previous translator of the record for the task for any new changes or modifications to the master document.                                                                                                                                                                                                   |
| <b>Self Administration</b>   | Check these options to allow console users to join work teams, change their own skills (categories), and change the locales they can translate records for. This is normally managed by the repository administrator.                                                                                                                                           |

Select **Save** Repository Properties.

The Management Console displays the new repository on the Manage Repositories page.

# Installing Oracle Knowledge Analytics

This chapter describes the installation process for Oracle Knowledge Analytics.

An Oracle Knowledge Analytics application consists of multiple components configured to extract, store, and present data collected from one or more configured Intelligent Search and/or Information Manager instances.

**Important!** Before using the Analytics installer, you must complete all the requirements and prerequisites for installing and configuring Analytics. These requirements are listed in the “Planning the Oracle Knowledge Analytics Installation” in this guide.

**Note:** We recommend that you install ODI and OBIEE on separate physical (or virtual) machines in the production environment. In other environments, such as Development and Staging, they can be co-located.

## Running the Analytics Installer

**Important!** We strongly recommend that you log out of all programs before you install Analytics.

Start the installer by locating and executing the appropriate installer for your environment.

## Starting the Installer in Windows Environments

To start the installer in Windows environments:

Double-click the installation file

or

Run the file using the command line with the following command:

```
install_analytics_<app_server>_<operating_system>_build_<#>.exe
```

The Analytics installer starts and the introduction screen displays.

## Starting the Installer in Linux Environments

To start the installer in Linux environments:

- 1 Open a bash shell by entering bash command:

```
bash
```

- 2 Use `cd` to go to the installer temporary directory.

- 3 Set the default locale for the bash shell to `en_US` by entering the following:

```
export LC_ALL="en_US"
```

- 4 Set permissions on the binary files so that they are executable by entering:

```
chmod +x *.bin
```

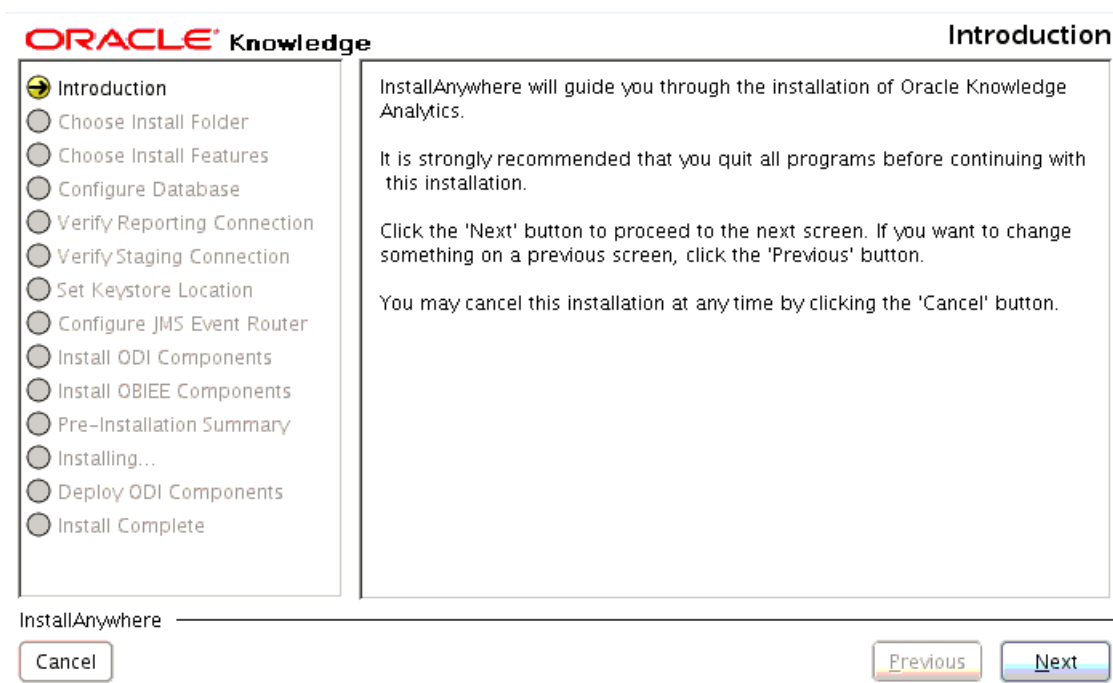
- 5 Start the installer:

```
./install_analytics_<app_server>_<operating_system>_build_<#>.bin.
```

When the initialization progress dialog completes, the installer displays the introduction screen. The Installation Introduction screen recommends that all other programs running be stopped and provides information on operating the installer.

## Analytics Installer Introduction

The Introduction screen recommends that you stop all other programs, and provides information on operating the installer:



- Select **Next** to continue.

## Select the Analytics Installation Directory

The Choose Install Folder screen prompts you to select the installation directory.

The screenshot shows the 'Choose Install Folder' window of the Oracle Knowledge installer. On the left is a vertical list of installation steps: Introduction (checked), Choose Install Folder (highlighted with a yellow arrow), Choose Install Features, Configure Database, Verify Reporting Connection, Verify Staging Connection, Set Keystore Location, Configure JMS Event Router, Install ODI Components, Install OBIEE Components, Pre-Installation Summary, Installing..., Deploy ODI Components, and Install Complete. The main area on the right contains a text box with the instruction 'Please choose a destination folder for this installation.' Below this is a section titled 'Where Would You Like to Install?' with a text input field containing the path '/scratch/qagroup/apps/8.6\_Installers/Analytics'. To the right of the input field are two buttons: 'Restore Default Folder' and 'Choose...'. At the bottom of the window, there is a 'Cancel' button on the left and 'Previous' and 'Next' buttons on the right. The title bar of the window reads 'ORACLE Knowledge Choose Install Folder'.

- Select the directory where you want to install the Analytics components.

The default installation location is:

- <user\_home>/Oracle/Knowledge/Analytics on Linux
- C:\Oracle\Knowledge\Analytics on Windows

We recommend that you install Analytics at the default location. However, you can install at any location by selecting **Choose** to open a file explorer and selecting an alternate location.

You can select **Restore Default Folder** to reset to the default installation directory, if necessary.

- Select **Next** to continue.

## Choose Install Features

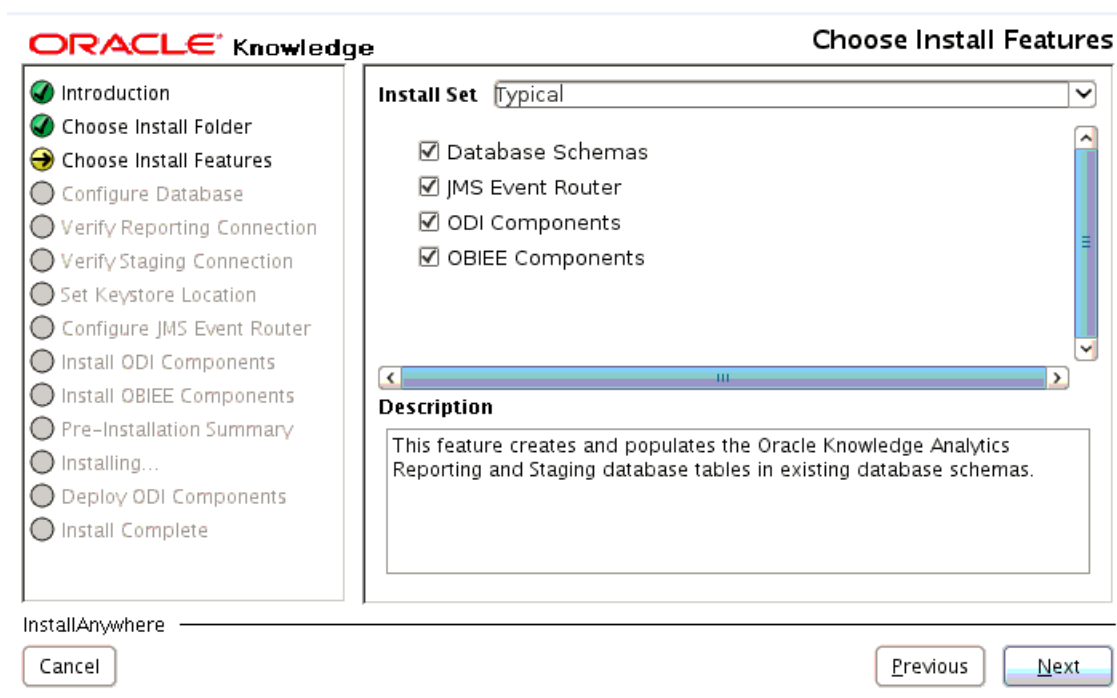
Select the Analytics components, or features, you want to install. The Analytics components are:

- **Database Schemas.** This component creates and populates the Oracle Knowledge Analytics reporting and staging database tables in new or existing database schemas. If you select any of the other features, you must select this feature as well to install the related database schemas.
- **Note:** When you install JMS Event Router, ODI Components or OBIEE Components, the installer checks that the Reporting Schema is installed. Therefore, you must always select the Database Schemas option to install the necessary database schemas for these options.
- **JMS Event Router.** This component configures and deploys the Oracle Knowledge Analytics JMS Event Router to the specified WebLogic domain. This option should be run from the JMS queue server.
- **ODI Components.** This component connects to the ODI instance and import the Oracle Knowledge Analytics interfaces into the ODI repository. This option should be run from the server hosting the ODI installation.
- **OBIEE Components.** This component unpacks the Oracle Knowledge Analytics OBIEE Components so they can be updated and imported using the OBIEE Administration Tool. This option should be run from the Windows machine being used to run the OBIEE BI Admin tool.

## Selecting the Features to Install

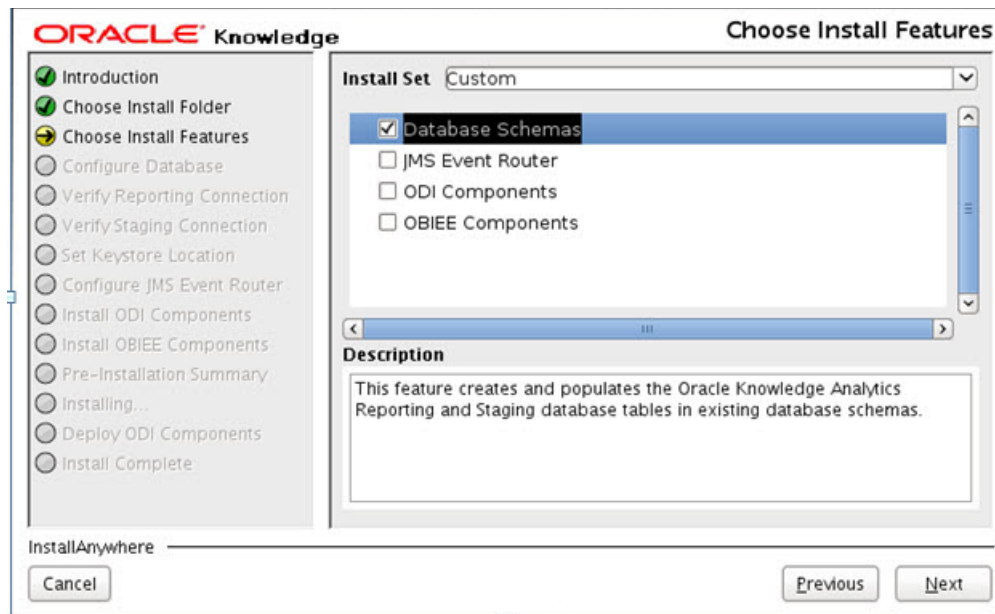
You can choose to install each feature separately or all at one time; however, you must install all the features before you can begin using Analytics. The installation sequence varies, depending on the components you select. We recommend that you install the database schemas first, then JMS Event Router, then ODI, and finally OBIEE.

### INSTALL ALL FEATURES



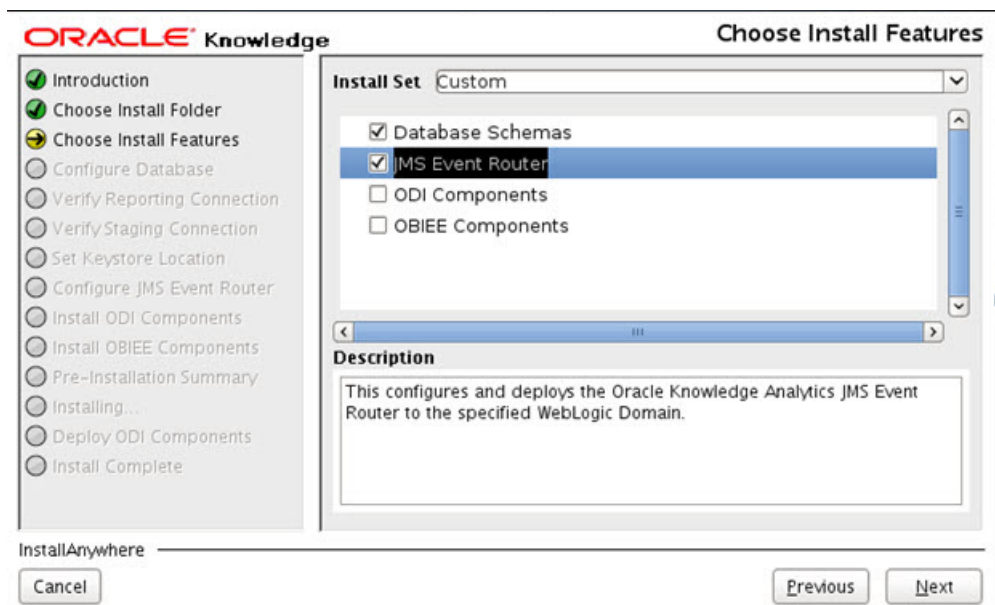
- If you choose to install all the features at once, select all four features and select **Next**.

## INSTALL DATABASE SCHEMAS



- If you choose to install only the database schemas, select *Database Schemas* and select **Next**.

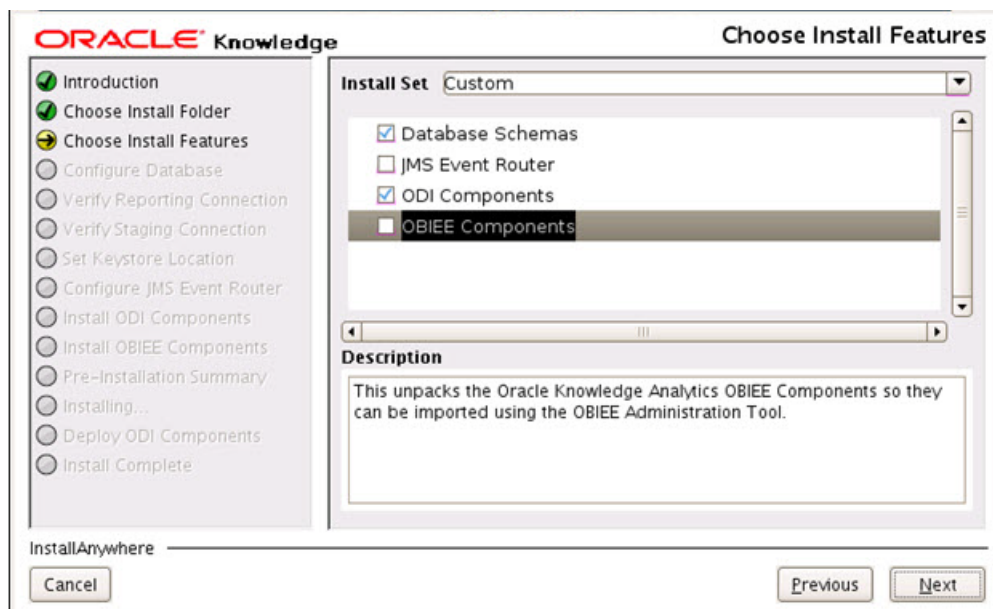
## INSTALL THE JMS EVENT ROUTER



- If you choose to install only the JMS Event Router, select *Database Schemas* and *JMS Event Router* and select **Next**

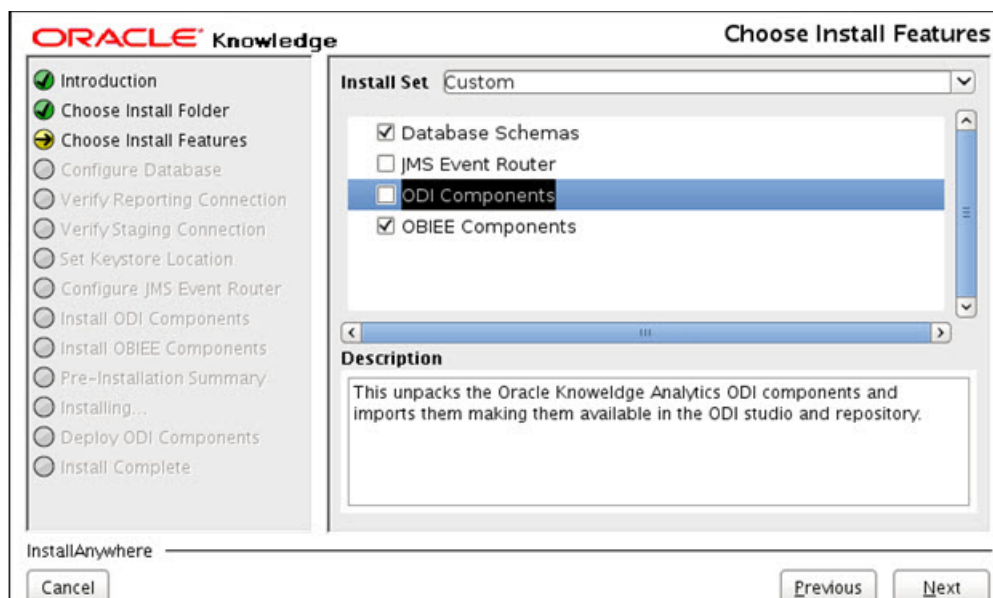


## INSTALL ODI COMPONENTS



- If you choose to install only the ODI Components select **Database Schemas** and **ODI Components** and select **Next**

## INSTALL OBIEE COMPONENTS



- If you choose to install only the OBIEE Components select *Database Schemas* and *OBIEE Components* and select **Next**.

## Select the Installation Type

Select whether to install a completely new installation, or to install an Upgrade installation.

The screenshot shows the Oracle Knowledge installer window. On the left is a vertical list of installation steps: Introduction, Choose Install Folder, Choose Install Features, Configure Database (highlighted with a yellow arrow), Verify Reporting Connection, Verify Staging Connection, Set Keystore Location, Configure JMS Event Router, Install ODI Components, Install OBIEE Components, Pre-Installation Summary, Installing..., Deploy ODI Components, and Install Complete. The main area is titled 'Select the installation type' and contains two radio button options: 'Fresh' (selected) and 'Upgrade'. Below 'Fresh' is the text: 'Installer will create the database objects in Reporting & Staging schema/database and data source.' Below 'Upgrade' is the text: 'Installer will use an existing database. Database objects will not be created in Reporting & Staging schema/database. Data source will be created.' At the bottom of the window are 'Cancel', 'Previous', and 'Next' buttons. The 'Next' button is highlighted with a blue gradient.

**ORACLE Knowledge** Select the installation type

☒ **Fresh**  
Installer will create the database objects in Reporting & Staging schema/database and data source.

☐ **Upgrade**  
Installer will use an existing database. Database objects will not be created in Reporting & Staging schema/database. Data source will be created.

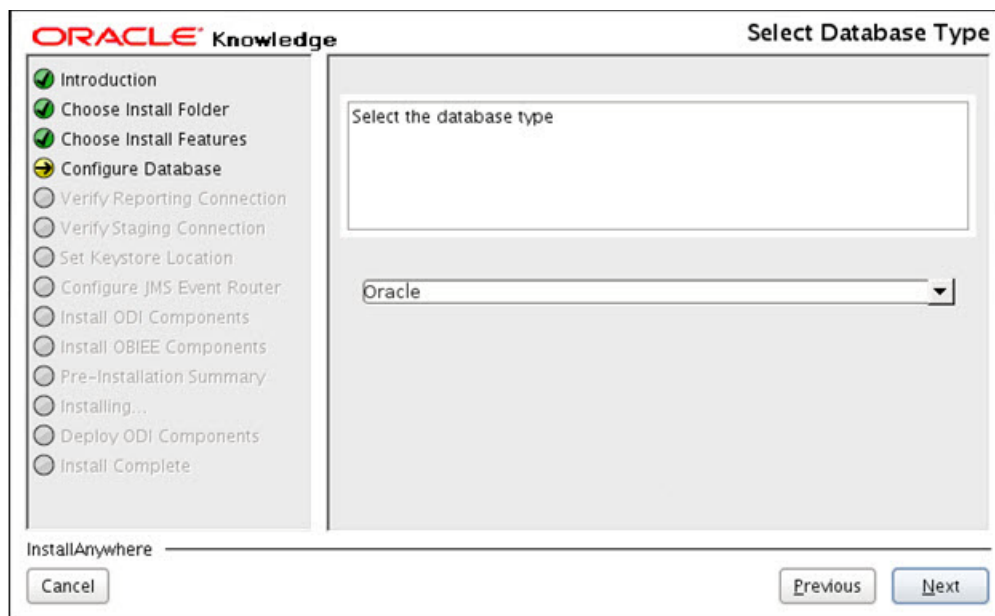
InstallAnywhere

Cancel Previous Next

- Select **Fresh** to create the database objects.
- Select **Next** to continue.

## Select the Database Type

Select whether you will use an Oracle or SQLServer database for Analytics.



- Select the type of database (Oracle or Microsoft SQL) from the drop-down list.
- Select **Next** to continue.

## Configure the Database

In the next steps, specify and verify the connection to the Analytics database.

### Specify Database Connection Information (Oracle)

Enter the database connection details.

The screenshot shows the 'Oracle Database Connection Information' dialog box from the Oracle Knowledge installer. On the left is a vertical list of installation steps: Introduction, Choose Install Folder, Choose Install Features, Configure Database (highlighted with a yellow arrow), Verify Reporting Connection, Verify Staging Connection, Set Keystore Location, Configure JMS Event Router, Install ODI Components, Install OBIEE Components, Pre-Installation Summary, Installing..., Deploy ODI Components, and Install Complete. The main area contains three input fields: 'Database Server Host' with the value 'slc01pgc.us.oracle.com', 'Database Server Port' with the value '1521', and 'Database Name' with the value 'slc01pgc'. At the bottom, there is a 'Cancel' button on the left and 'Previous' and 'Next' buttons on the right. The 'Next' button is highlighted.

- Enter the database host, port, and name. The installer attempts to validate the database connection information.
- Select **Next** to continue.

## Verify Reporting Schema Connection (Oracle Database)

Enter and confirm the reporting schema password.

The screenshot shows the 'Verify Reporting Schema Connection' window in the Oracle Knowledge installer. On the left is a navigation pane with a list of steps: Introduction, Choose Install Folder, Choose Install Features, Configure Database, Verify Reporting Connection (highlighted with a yellow arrow), Verify Staging Connection, Set Keystore Location, Configure JMS Event Router, Install ODI Components, Install OBIEE Components, Pre-Installation Summary, Installing..., Deploy ODI Components, and Install Complete. The main area contains a note: 'Note: The installation process will create the tables on the DW\_REPORTING schema if they do not exist. Please provide the database password below.' Below the note are two password input fields: 'Database Password' and 'Re-enter Database Password', both masked with asterisks. At the bottom of the window are three buttons: 'Cancel', 'Previous', and 'Next'.

**ORACLE Knowledge** **Verify Reporting Schema Connection**

Introduction  
Choose Install Folder  
Choose Install Features  
Configure Database  
Verify Reporting Connection  
Verify Staging Connection  
Set Keystore Location  
Configure JMS Event Router  
Install ODI Components  
Install OBIEE Components  
Pre-Installation Summary  
Installing...  
Deploy ODI Components  
Install Complete

Note: The installation process will create the tables on the DW\_REPORTING schema if they do not exist. Please provide the database password below.

**Database Password**  
\*\*\*\*\*

**Re-enter Database Password**  
\*\*\*\*\*

InstallAnywhere

Cancel Previous Next

- Enter and re-enter the password for the DW\_REPORTING reporting schema.
- Select **Next** to continue.

## Verify Staging Schema Connection (Oracle Database)

Enter and confirm the staging schema password.

The screenshot shows the 'Verify Staging Schema Connection' window from the Oracle Knowledge installer. On the left is a navigation pane with a list of steps: Introduction, Choose Install Folder, Choose Install Features, Configure Database, Verify Reporting Connection, Verify Staging Connection (highlighted with a yellow arrow), Set Keystore Location, Configure JMS Event Router, Install ODI Components, Install OBIEE Components, Pre-Installation Summary, Installing..., Deploy ODI Components, and Install Complete. The main area contains a note: 'Note: The installation process will create the tables on the DW\_STAGE schema if they do not exist. Please provide the database password below.' Below the note are two password input fields: 'Database Password' and 'Re-enter Database Password', both showing masked characters. At the bottom, there is a 'Cancel' button on the left and 'Previous' and 'Next' buttons on the right. The 'InstallAnywhere' logo is visible in the bottom left corner.

- Enter the password for the DW\_STAGE staging schema.
- Select **Next** to continue.

## Specify Database Connection Information (SQL Server)

Enter the database host, port, user, and password.

**ORACLE Knowledge** **SQL Server Database Connection Information**

- Introduction
- Choose Install Folder
- Choose Install Features
- Configure Database**
- Verify Reporting Connection
- Verify Staging Connection
- Set Keystore Location
- Configure JMS Event Router
- Install ODI Components
- Install OBIEE Components
- Pre-Installation Summary
- Installing...
- Deploy ODI Components
- Install Complete

**Database Server Host**  
slc0100t.us.oracle.com

**Database Server Port**  
1433

**Database User**  
qauser

**Database Password**  
\*\*\*\*\*

**Re-enter Database Password**  
\*\*\*\*\*

InstallAnywhere

Cancel Previous Next

- Enter the database host name, the server port number, the database user, and the database password.
- Select **Next** to continue.

## Verify Reporting Schema Connection (SQL Server)

The installer verifies the connection to the reporting schema, DW\_REPORTING.

- Enter and re-enter the password for the reporting schema DW\_REPORTING.
- Select **Next** to continue.

## Verify Staging Schema Connection (SQL Server)

The installer verifies the connection to the staging schema, DW\_STAGE.

- Enter and re-enter the password for the staging schema, DW\_STAGE.
- Select **Next** to continue.

## Create or Specify the Keystore

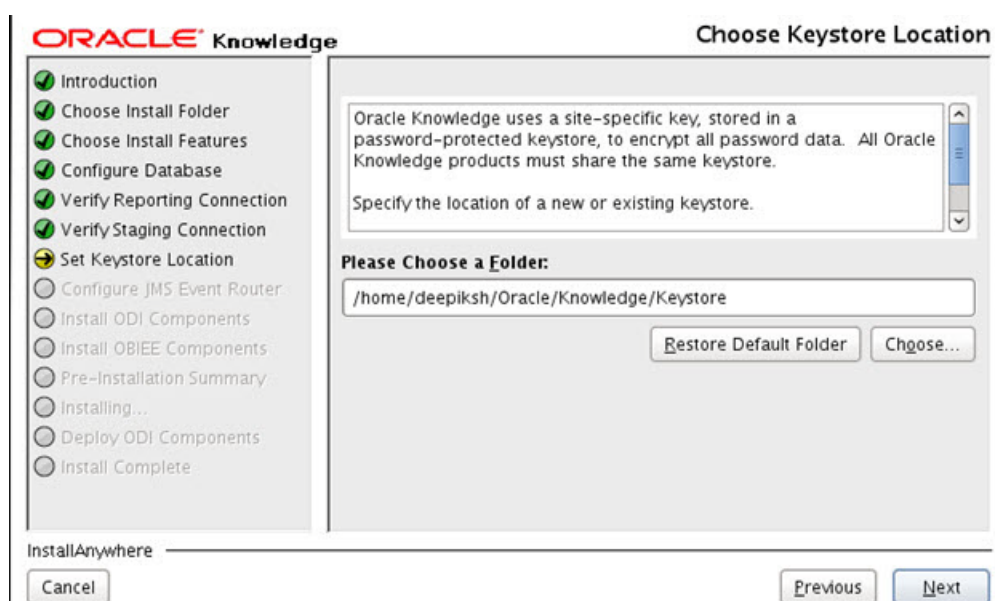
The installer prompts you to specify the location of the Oracle Knowledge keystore.

- If you are installing Analytics before installing Search or Information Manager (recommended), create a new keystore and use this keystore for subsequent installations.
- If you have already installed Oracle Knowledge Search or Information Manager, use the keystore that you created during that installation by selecting its location.

For more information about the keystore, see “Creating the Oracle Knowledge Keystore” on page 24.

## Choose the Keystore Location

You must configure a keystore that is used by all Oracle Knowledge products.



- Specify one of the following:
  - the location of an existing keystore that can be shared by all Oracle Knowledge products.
  - the location of a new keystore that the installer will create.

The default key store location is:

<INSTALL\_FOLDER\_PARENT>/Keystore

where:

<INSTALL\_FOLDER\_PARENT> is the parent folder of the top-level installation folder.

For example, if you are installing in <user\_home>/Oracle/Knowledge/Analytics, then the installer uses the default key store location: <user\_home >/Oracle/Knowledge/Keystore.

- Select **Next** to continue.

The installation program checks whether a keystore exists in the specified location.

If you specify the location of an existing keystore, the installer uses the existing keystore files to encrypt the necessary values, as required, and displays the “Choose the Analytics Router Instance Name” on page 144 screen.



If you specify a new keystore location, the installer prompts you to create the keystore, displaying the **Create Keystore** screen. To create a new keystore, see “Create the Encryption Keystore” on page 45.

## Specify Java Options for Service

This screen displays only if you selected to install the JMS Event Router.

**ORACLE Knowledge** Specify Java Options for Service

☒ Introduction  
☒ Choose Install Folder  
☒ Choose Install Features  
☒ Configure Database  
☒ Verify Reporting Connection  
☒ Verify Staging Connection  
☒ Set Keystore Location  
☒ **Configure JMS Event Router**  
☐ Install ODI Components  
☐ Install OBIEE Components  
☐ Pre-Installation Summary  
☐ Installing...  
☐ Deploy ODI Components  
☐ Install Complete

**Java Home used by WebLogic (Specify the parent directory of the JDK's bin directory)**

**Memory Allocation Pool Initial Size (-Xms in Megabytes)**

**Memory Allocation Pool Maximum Size (-Xmx in Megabytes)**

**Maximum Permanent Generation Size (-XX:MaxPermSize in Megabytes)**

InstallAnywhere

- Specify the Java Home, memory allocation arguments, and the garbage collection tuning argument for the JVM that starts the managed server where the JMS Event Router is deployed. Enter the following parameters:

| Option                              | Description                                                                                                                      |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| Java Home used by WebLogic          | Specify the parent directory of the JDK's bin directory. For example, C:\Oracle\Middleware\jdk160_24 or /usr/lib/jvm/java-1.6.0. |
| Memory Allocation Pool Initial Size | Specify the -XmsnM argument, where n is a number of megabytes. The recommended value is 2048.                                    |
| Memory Allocation Pool Maximum Size | Specify the -XmxnM argument, where n is a number of megabytes. The recommended value is 2048.                                    |
| Maximum Permanent Generation Size   | Specify the -XX:MaxPermSize=nM argument, where n is a number of megabytes. The recommended value is 256.                         |

- Select **Next** to continue.

## Choose WebLogic Install Directory

Specify the directory in which the WebLogic Server you are configuring for Analytics is located.

The screenshot shows the 'Choose WebLogic Install Directory' window from the Oracle Knowledge installer. On the left is a vertical list of installation steps, with 'Configure JMS Event Router' highlighted. The main area contains instructions to enter the directory for Middleware\_Home or Oracle\_Home. Below this is a text field with the path '/scratch/qagroup/apps/Weblogic' and two buttons: 'Restore Default Folder' and 'Choose...'. At the bottom are 'Cancel', 'Previous', and 'Next' buttons.

**ORACLE Knowledge** **Choose WebLogic Install Directory**

Introduction  
Choose Install Folder  
Choose Install Features  
Configure Database  
Verify Reporting Connection  
Verify Staging Connection  
Set Keystore Location  
Configure JMS Event Router  
Install ODI Components  
Install OBIEE Components  
Pre-Installation Summary  
Installing...  
Deploy ODI Components  
Install Complete

Please enter the directory configured as Middleware\_Home (for Weblogic 11g) or Oracle\_Home (for Weblogic 12c).

**Please Choose a Folder:**

/scratch/qagroup/apps/Weblogic

Restore Default Folder Choose...

InstallAnywhere

Cancel Previous Next

- Select the directory in which WebLogic Server is installed

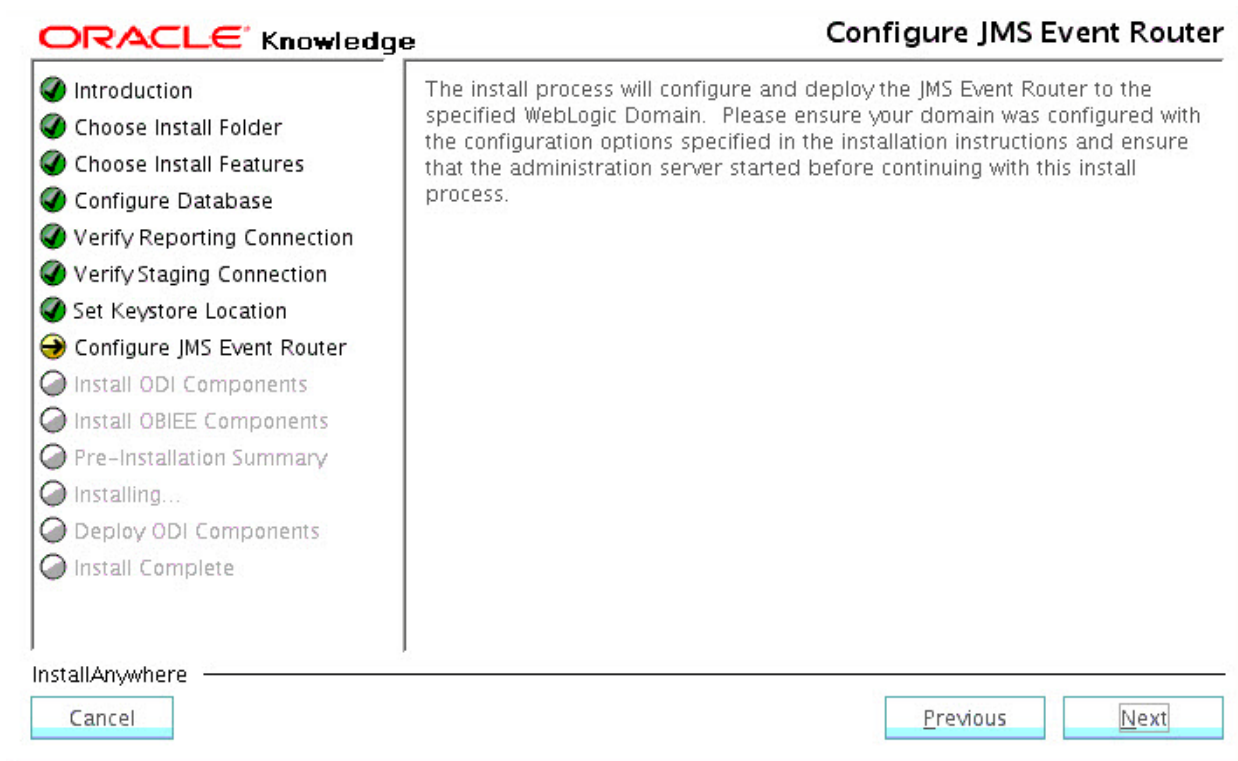
For example:

<weblogic\_dir>/Middleware/wlserver\_10.3).

- Select **Next** to continue.

## Configure the JMS Event Router

The installer configures and deploys the JMS Event Router to the specified WebLogic domain.



**Note:** If you did not select the *Install JMS Event Router* option, you will not see this screen.

- Make sure that your target domain is configured with the options specified in the installation instructions before proceeding.
- Make sure the Admin server and Node Manager are running prior to executing the following steps so the installer can properly configure the JMS queue and deploy the Oracle Knowledge Event Router.
- Select **Next** to continue.

## Choose the Analytics Router Instance Name

Enter a name for the Analytics Event Router. We recommend that you use the default name, `AnalyticsEventRouter`.

The screenshot shows the 'Choose Analytics Event Router Instance Name' dialog box from the Oracle Knowledge installer. On the left is a vertical list of installation steps, with 'Configure JMS Event Router' highlighted. The main area contains a text box with the instruction 'Enter the instance name where the Oracle Knowledge Analytics Event Router will be installed.' Below this is a label 'Instance Name' and a text input field containing 'AnalyticsEventRouter'. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons. The 'InstallAnywhere' logo is visible in the bottom left corner.

- Enter the name *AnalyticsEventRouter* in the **Instance Name** field.  
Analytics creates a folder with this instance name under the `<INSTALL_ROOT>/instances` directory.
- Select **Next** to continue.

## Choose a WebLogic Domain

Specify the WebLogic domain in which you want to install the Analytics Event Router.

The screenshot shows the 'Choose a WebLogic Domain' window from the Oracle Knowledge installer. On the left is a vertical list of installation steps, with 'Configure JMS Event Router' highlighted by a yellow arrow. The main area contains instructions to choose a location for the WebLogic Domain. A text box displays the path `/scratch/qagroup/apps/Weblogic/user_projects/domains/base_domain`. Below the text box are 'Restore Default Folder' and 'Choose...' buttons. At the bottom of the window are 'Cancel', 'Previous', and 'Next' buttons.

**ORACLE<sup>®</sup> Knowledge** **Choose a WebLogic Domain**

Introduction  
Choose Install Folder  
Choose Install Features  
Configure Database  
Verify Reporting Connection  
Verify Staging Connection  
Set Keystore Location  
**Configure JMS Event Router**  
Install ODI Components  
Install OBIEE Components  
Pre-Installation Summary  
Installing...  
Deploy ODI Components  
Install Complete

Please choose the location of your WebLogic Domain where the Oracle Knowledge Analytics JMS Event Router will be configured.

**Please Choose a Folder:**

`/scratch/qagroup/apps/Weblogic/user_projects/domains/base_domain`

Restore Default Folder Choose...

InstallAnywhere

Cancel Previous Next

- Choose the WebLogic domain directory to which you want to install the event router, for example, `<user_home>/Oracle/Middleware/user_projects/domains/<domain_name>`.

**Note:** We recommend that you install the event router in a new managed server.

- Select **Next** to continue.

## Set the WebLogic Administrator Credentials

Provide the credentials to the administration server of the specified domain.

The screenshot shows the 'Set WebLogic Administrator Credentials' dialog box. On the left is a progress list with steps: Introduction, Choose Install Folder, Choose Install Features, Configure Database, Verify Reporting Connection, Verify Staging Connection, Set Keystore Location, Configure JMS Event Router (highlighted with a yellow arrow), Install ODI Components, Install OBIEE Components, Pre-Installation Summary, Installing..., Deploy ODI Components, and Install Complete. The main area contains instructions: 'Oracle Knowledge Analytics will configure the JMS Event Router to your WebLogic Domain Server. Please provide the username, password, and server URL to the administration server on the following domain: base\_domain.' Below this are four input fields: 'Administrator User Name' (containing 'weblogic'), 'Administrator Password' (masked with asterisks), 'Re-enter Administrator Password' (masked with asterisks), and 'Administration Server URL' (empty). At the bottom are 'Cancel', 'Previous', and 'Next' buttons.

- Enter the following properties:

| Property                    | Description                                                                                           |
|-----------------------------|-------------------------------------------------------------------------------------------------------|
| Administrator User Name     | Specify the user name of the user used to boot the administration server.                             |
| Administrator User Password | Specify the password of the user used to boot the administration server.                              |
| Administration Server URL   | Specify the <protocol>://<listen address>:<listen port> used to connect to the administration server. |

- Select **Next** to continue.

## Set the Managed Server Values

The installation process creates a new managed server and machine in the WebLogic domain. The installer uses the credentials of the administration server to boot the new managed server. The new managed server is associated with the machine.

**ORACLE Knowledge** **Set Managed Server Values**

☒ Introduction  
☒ Choose Install Folder  
☒ Choose Install Features  
☒ Configure Database  
☒ Verify Reporting Connection  
☒ Verify Staging Connection  
☒ Set Keystore Location  
☒ Configure JMS Event Router  
☐ Install ODI Components  
☐ Install OBIEE Components  
☐ Pre-Installation Summary  
☐ Installing...  
☐ Deploy ODI Components  
☐ Install Complete

The installation process will create a managed server with the values specified below in the base\_domain domain.

**Managed Server Name**  
 AnalyticsEventRouter\_Server

**Listen Address**  
 slc03jtt

**Listen Port**  
 7002

**Machine Name**  
 AnalyticsEventRouter\_Machine

InstallAnywhere

- Enter the following properties:

| Property            | Description                                                                                                                             |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| Managed Server Name | Specify the name of the new managed server. Make sure that the name is unique to your domain.                                           |
| Listen Address      | Specify the listen address of the new managed server. The default value is the local address of the machine running the installer.      |
| Listen Port         | Specify the listen port of the new managed server. The default value is 7002.                                                           |
| Machine Name        | Specify the name of the new machine to which the new managed server is associated. Make sure the machine name is unique to your domain. |

- Select **Next** to continue.

## Set JMS Queue Parameters

We recommend that you use the defaults when you set the JMS queue parameters. If you are installing the Analytics Event Router on an existing WebLogic domain, make sure you change one or more WebLogic names to avoid conflicts with existing objects.

If you don't use the defaults, record the values you enter; they must be provided to other component installers for their Analytics logging support.

**ORACLE Knowledge** Set JMS Queue Parameters

- ☒ Introduction
- ☒ Choose Install Folder
- ☒ Choose Install Features
- ☒ Configure Database
- ☒ Verify Reporting Connection
- ☒ Verify Staging Connection
- ☒ Set Keystore Location
- ☒ **Configure JMS Event Router**
- ☐ Install ODI Components
- ☐ Install OBIEE Components
- ☐ Pre-Installation Summary
- ☐ Installing...
- ☐ Deploy ODI Components
- ☐ Install Complete

JMS Factory Name:

JMS Factory JNDI Name:

JMS Queue Name:

JMS Queue JNDI Name:

JMS Persistent Store Name:

JMS Persistent Store Location:

InstallAnywhere

- Enter the following parameters, then select **Next** to continue:

| Parameter                     | Default Value                                | Description                                                          |
|-------------------------------|----------------------------------------------|----------------------------------------------------------------------|
| JMS Factory Name              | ConnectionFactory-AnalyticsConnectionFactory | The WebLogic name of the Analytics JMS Connection Factory.           |
| JMS Factory JNDI Name         | jms/AnalyticsConnectionFactory               | The JNDI name of the Analytics JMS Connection Factory.               |
| JMS Queue Name                | Queue-AnalyticsQueue                         | The WebLogic name of the Analytics JMS queue.                        |
| JMS Queue JNDI Name           | jms/AnalyticsQueue                           | The JNDI name of the Analytics JMS queue.                            |
| JMS Persistent Store Name     | Queue                                        | The WebLogic name of the Analytics JMS queue's file store.           |
| JMS Persistent Store Location | <domain path>/queuePersistence               | The directory where the Analytics JMS queue's file store is located. |

**Important!** The JNDI parameter default values must be retained. Changing these values could render Analytics unusable.



## Choose the ODI Install Location

If you selected to install ODI, choose the location for the ODI installation; this can be any location.

**ORACLE Knowledge** Choose ODI Install Location

Introduction  
Choose Install Folder  
Choose Install Features  
Configure Database  
Verify Reporting Connection  
Verify Staging Connection  
Set Keystore Location  
Configure JMS Event Router  
➔ Install ODI Components  
Install OBIEE Components  
Pre-Installation Summary  
Installing...  
Deploy ODI Components  
Install Complete

Please choose the folder where ODI was installed.

**Please Choose a Folder:**

/scratch/qagroup/apps/8.6\_Installers/Analytics/ODI

Restore Default Folder Choose...

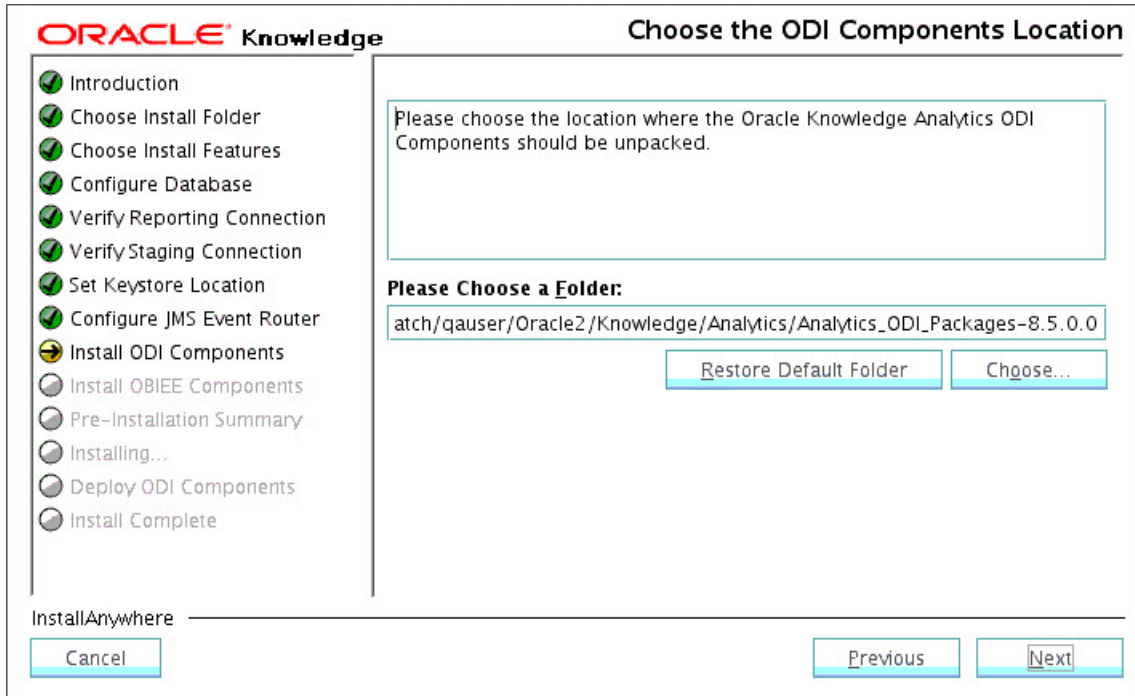
InstallAnywhere

Cancel Previous Next

- Select the directory where ODI is installed.
- Select **Next** to continue.

## Choose the ODI Components Location

The ODI components include all of the interfaces for the master repository, work repository, and logical repository. These interfaces are imported by the installer later.

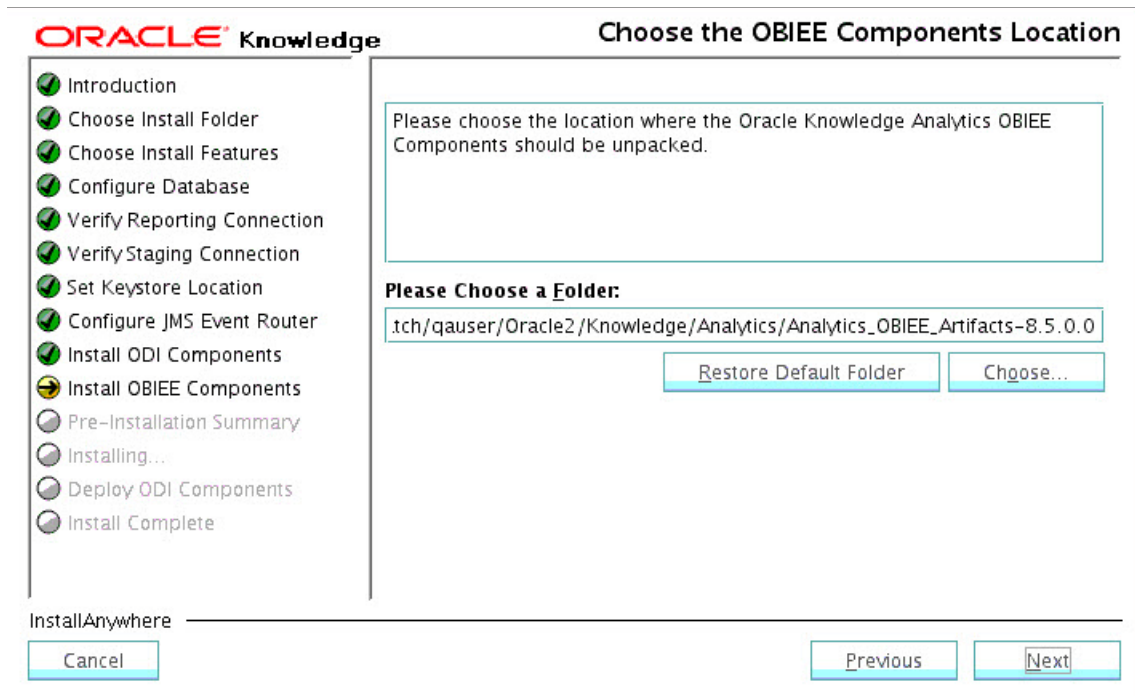


- Select the location to unpack the ODI components; this can be any location.
- Select **Next** to continue.

## Choose the OBIEE Components Location

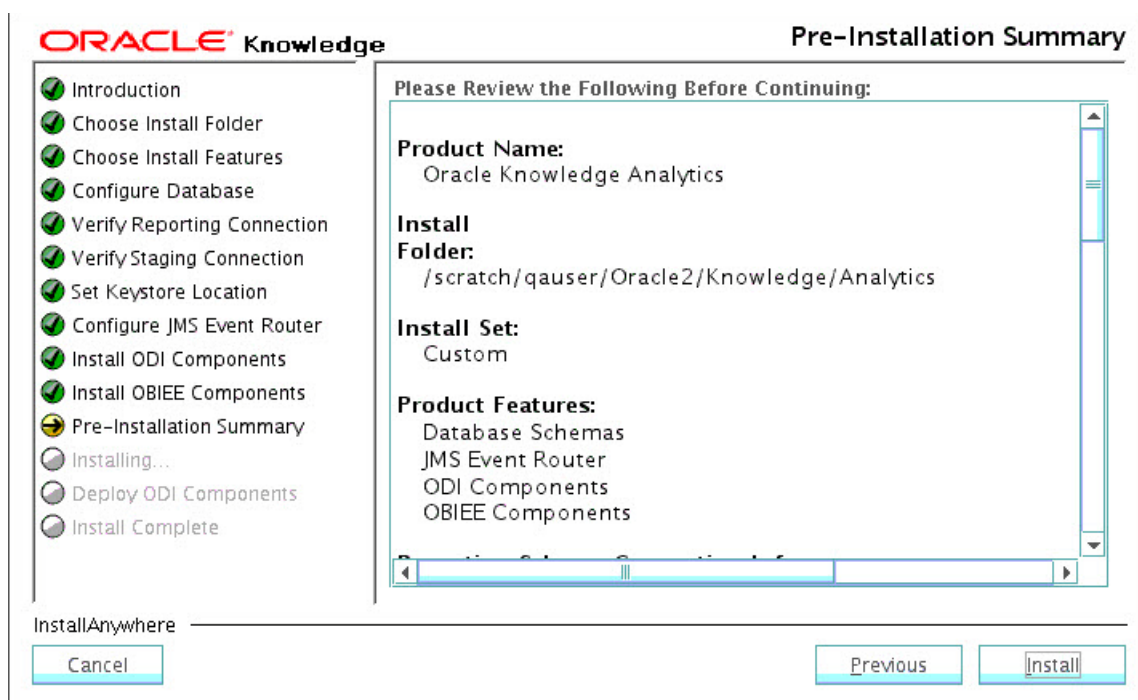
If you selected to install OBIEE, this screen displays.

The OBIEE components include the RPD file, the web catalog, and the CSS file.



- Select the location for the installer to unpack the OBIEE components. This can be any location on a Windows machine.
- Select **Next** to continue.

## Verify the Installation Specifications

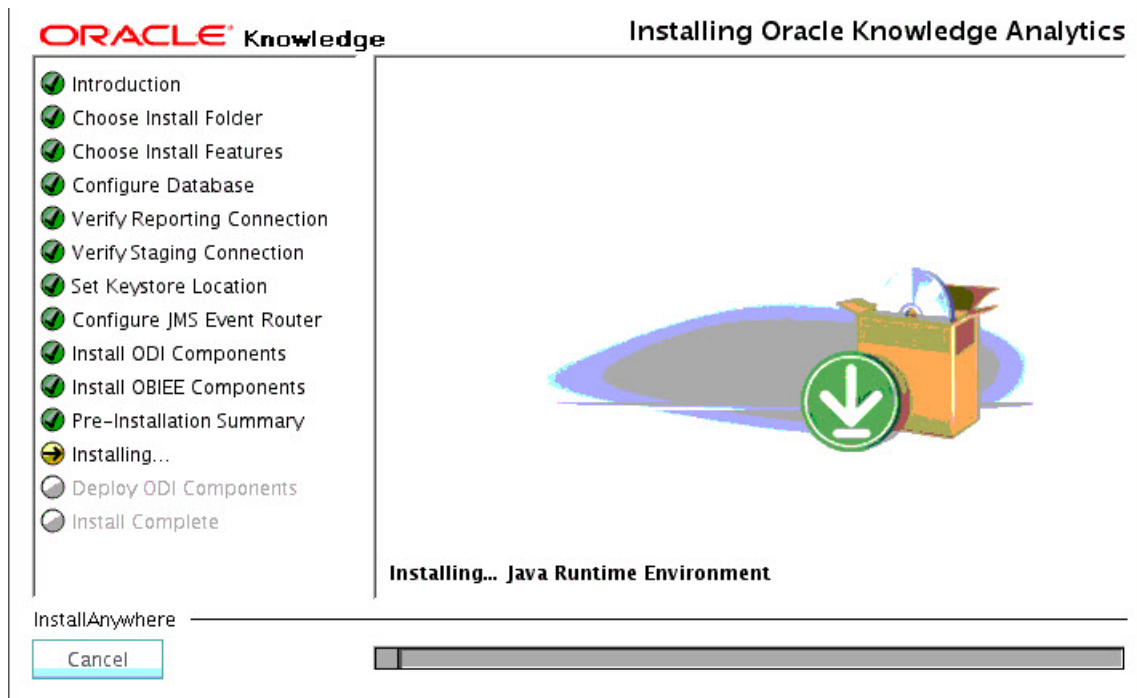


- Check your selections in the Pre-installation Summary screen. To modify any selections, select **Previous** until you get back to the screen where you need to make a change.
- Select **Install** to start the installation process.

## Installing Oracle Knowledge Analytics

The Installing Oracle Knowledge Analytics screen shows the progress of the installation.

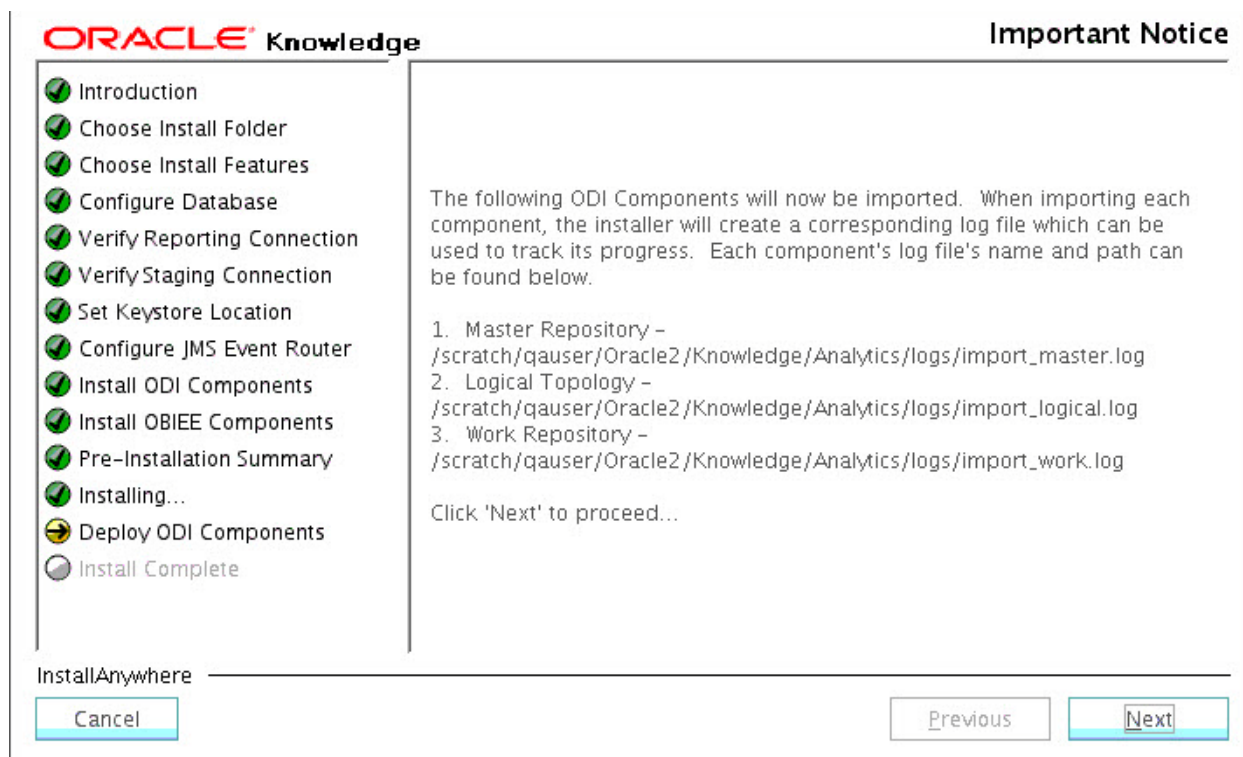
**Note:** Installing the reporting schema might take a substantial length of time.



## Importing the ODI Components

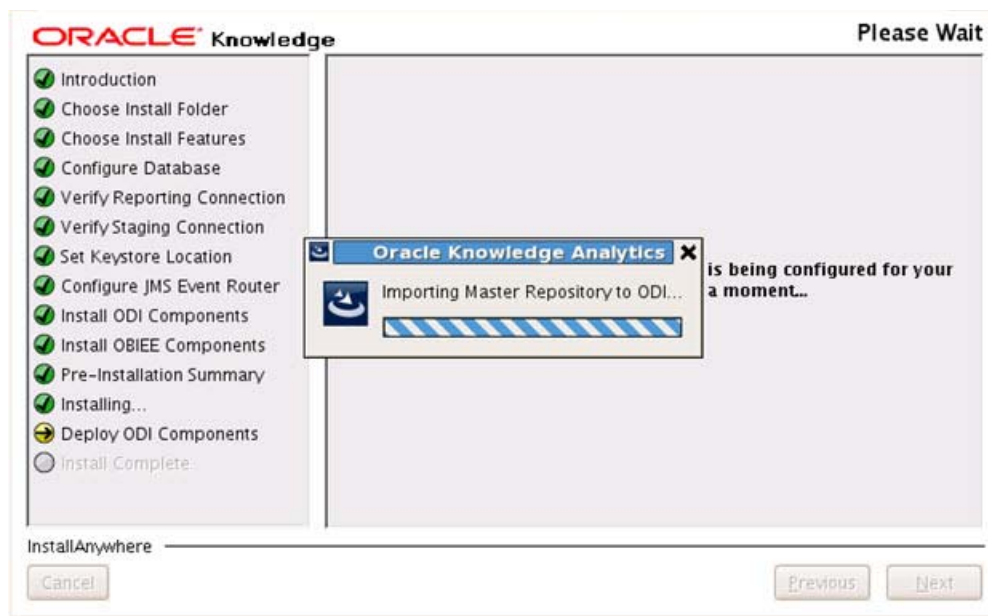
The installer displays a notice about the ODI import process. The installer will import the ODI components into the specified locations, and will create log files that you can use to monitor progress. The log files are located in the /Analytics/logs sub-directories of the installation directory. The log filenames are:

| Component         | Log Filename       |
|-------------------|--------------------|
| Master Repository | import_master.log  |
| Logical Topology  | import_logical.log |
| Work Repository   | import_work.log    |



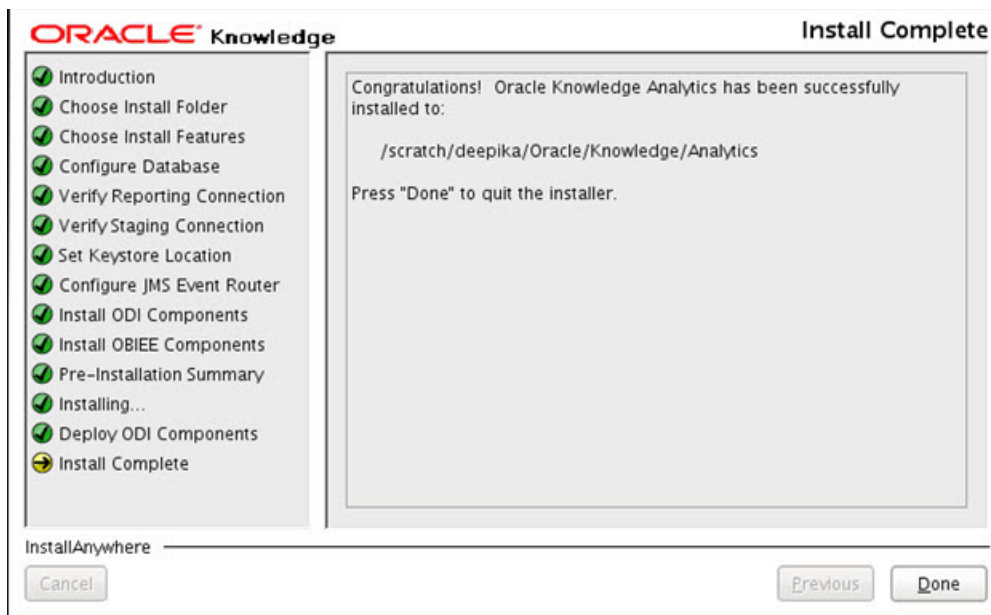
- Select **Next** to continue.

The installer deploys the ODI components and continues to complete the installation.



## Complete the Installation Process

The Install Complete screen summarizes the installation process. The Analytics component directories and files are now installed in the specified location.



- Depending on the options chosen during the installation, there may be additional work that needs to be performed after the installation.
- Select **Done** to exit the installer.



## Completing the Analytics Installation

You must perform these procedures to complete the Analytics installation.

| Procedures                                                                               | Description                                                                                                         |
|------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| <b>Databases</b>                                                                         |                                                                                                                     |
| <a href="#">Validating the Database Schemas</a>                                          | Use these procedures to check that the database schemas were created and populated                                  |
| <a href="#">Validating the Reporting Schema</a>                                          |                                                                                                                     |
| <a href="#">Validating the Staging Schema</a>                                            |                                                                                                                     |
| <b>JMS Queue and Event Router</b>                                                        |                                                                                                                     |
| <a href="#">Validating JMS Queue and Event Router Installation</a>                       | Use this procedure to verify the JMS installation by checking the configuration of the WebLogic domain.             |
| <b>ODI</b>                                                                               |                                                                                                                     |
| <a href="#">Configuring the ODI</a>                                                      | Use these procedures to validate the ODI interfaces and set the database connections.                               |
| <a href="#">Validating the ODI Installation</a>                                          |                                                                                                                     |
| <a href="#">Connecting ODI to an Oracle Database</a>                                     |                                                                                                                     |
| <a href="#">Connecting ODI to an SQLServer Database</a>                                  |                                                                                                                     |
| <a href="#">Additional Task for Customers Using an Oracle 12c or Oracle RAC Database</a> |                                                                                                                     |
| <b>OBIEE</b>                                                                             |                                                                                                                     |
| <a href="#">Completing the OBIEE Installation</a>                                        | Use these procedures to configure the OBIEE RPD and apply the styles and formatted needed to view Analytic reports. |
| <a href="#">Connect OBIEE to the Data Warehouse</a>                                      |                                                                                                                     |
| <a href="#">Configuring Connections to the Database</a>                                  |                                                                                                                     |
| <a href="#">Open the RPD</a>                                                             |                                                                                                                     |
| <a href="#">Change the RPD PasswordConnecting to the Reporting Schema</a>                |                                                                                                                     |

## Validating the Database Schemas

This section describes how to validate the staging, reporting, and work database schemas.

### Validating the Staging Schema

Check that:

- the `INSTALL_HISTORY` table in the `DW_REPORTING` schema indicates that the `DW_STAGE` schema was populated
- the `DW_EVENT_DEFINITION` table is populated with the list of available analytics events

### Validating the Reporting Schema

Check that the `INSTALL_HISTORY` table has a record for each of the operations performed by the installer.

## Validating JMS Queue and Event Router Installation

Validate the JMS Queue and Event Router installation by inspecting the WebLogic domain configuration.

To validate the installation:

- 1 Open the Oracle WebLogic Server Administration Console in a browser.
- 2 Navigate to the **Domain Structure** panel (left side of the screen) to verify that the JMS router and JMS queue components are installed.
  - Select **Environment > Servers** to verify the server you specified during install time appears in the Servers list.
  - Select **Environment > Machine** to verify the machine you specified during install time appears in the Machines list.
  - Select **Deployment** to verify that **AnalyticsEventRouterEA-8.6.0.0** is listed as a deployable that can be started or stopped in the **Deployments** list.
  - Select **Services > Messages > JMS Servers** to verify that **JMSServer-OracleKnowledgeAnalytics** appears in the JMS Servers list.
  - Select **Services > Messages > JMS Modules** to verify that **SystemModule-OracleKnowledgeModule** appears in the JMS Modules list.
  - Select **JMS Modules > Connection Factory** to verify that **AnalyticsConnectionFactory (default name)** appears in the JMS Connection Factory list. This is the connection factory to which the Information Manager and Intelligent Search applications connect.
  - Select **Services > Data Sources** to verify that **JDBC/AnalyticsDataSource** appears in the Data Source list. This points to the staging database host and `DW_STAGE` schema.
  - Select **Services > Persistent Stores** to verify that **JDBC/AnalyticsDataSource** appears in the Queue (default name) list.

## Configuring the ODI

This section describes how to validate the ODI installation, connect ODI to the databases and configure the ODI agent.

### Validating the ODI Installation

The Analytics installer connects to the ODI instance and automatically imports the Oracle Knowledge Analytics interfaces into the ODI repositories. These interfaces represent the transforms that convert the incoming analytics events into reporting data.

Validate that the import process succeeded by:

- opening the ODI repository using the ODI admin tool
- locating the interfaces that were imported during the install process

To check that the installer imported the interfaces:

- Select `Designer > Projects > DW_Data_Loads > DW_Data_Loads > Interfaces`.

If the import process is successful, the Analytics interfaces appear in the Interfaces list. These interfaces represent the transforms that convert the incoming analytics events into reporting data.

If you do not see the interfaces, import them manually using the procedure "Import the Analytics ODI Components Manually" on page 186.

### Connecting ODI to an Oracle Database

You must configure ODI to connect to the Analytics database. To configure ODI for an Oracle database:

- 1 In the Topology tab, select `Physical Architecture > Technologies > Oracle > ORACLE_SERVER`.
- 2 In the Definition tab:
  - Under (Instance / dblink (Data Server)), enter the reporting and staging schemas' database's TNS name.
  - Enter the ODI work schema name and password (as created in "Running the Analytics Installer" on page 128) under User and Password, respectively.
- 3 In the JDBC tab, enter the JDBC connection string (`jdbc:oracle:thin:@<host>:<port>:<SID>`) of the database.
- 4 Select Test Connection to save and test the connection.
- 5 Expand the ORACLE\_SERVER node under Topology.
- 6 Select ORACLE\_SERVER.DW\_REPORTING and enter the ODI work schema name under Schema (Work Schema).
- 7 Select ORACLE\_SERVER.DW\_STAGING and enter the ODI work schema name under Schema (Work Schema).

## Connecting ODI to an SQLServer Database

You must configure ODI to connect to the Analytics database. To configure ODI for an SQLServer database:

- 1 In the Topology tab, select **Physical Architecture > Technologies > Microsoft SQL Server > SQL\_SERVER**.
- 2 In the Definition tab:
  - Under **Data Server**, enter the database server name.
  - Under **Connection**, enter the username and password to connect to the database.
- 3 In the JDBC tab, enter the JDBC connection string (`jdbc:weblogic:sqlserver://<host>:<port>`) of the database.
- 4 Select **Test Connection** to save and test the connection.
- 5 Expand the **SQL\_SERVER** node under **Topology**.
- 6 Select **SQL\_SERVER.DW\_REPORTING.dbo** and enter the ODI work schema name for Database (Work Catalog).
- 7 Select **SQL\_SERVER.DW\_STAGE.dbo** and enter the ODI work schema name for Database (Work Catalog).

## Configure the ODI Agent

The basic installation of ODI installs both the standalone agent and the Java agent. *Agents* are used to execute the ODI packages to perform the transforms.

**Note:** For Analytics, you must install the ODI agent as *Standalone*. See the “Installing Oracle Data Integrator (ODI)” procedure in this guide.

## Additional Task for Customers Using an Oracle 12c or Oracle RAC Database

Use this procedure if you are using the Oracle 12c or Oracle RAC database only. It replaces the existing SQL query with an updated query.

- 1 Log into ODI and select your work repository.
- 2 Select the **Designer** tab.
- 3 Expand **DW\_Data\_Loads**.
- 4 Expand **Procedures** and open the **UPDATE\_BRIDGE\_QUESTN\_RESPONSE\_STG** procedure.
- 5 Select **Details** and open the **UPDATE\_BRG\_QUES\_RESPONSE\_STG\_U\_DUPLICATE** step.
- 6 Select **Command On Target**.  
You see the existing SQL query.
- 7 Replace the existing SQL query with the following query:

```
UPDATE dw_reporting.bridge_questn_response_stg
SET ind_upd = 'U'
WHERE ind_upd = 'I'
AND (data_id, questn_key) NOT IN
(
  SELECT max(data_id), questn_key
  FROM (
```

```

        SELECT data_id, questn_key, response_key, brg_num_in_set,
ind_upd,
        row_number() OVER (PARTITION BY questn_key ,
brg_num_in_set ORDER BY data_id) AS rownumber
FROM (
        select data_id, questn_key,
brg_num_in_set,ind_upd,output as response_key
        from
        (select data_id, questn_key,
brg_num_in_set,ind_upd, listagg(response_key,',') WITHIN GROUP (ORDER BY
data_id ) over (partition by data_id ) as output,
        count(response_key) over (partition by
data_id order by response_key) as running_count,
        count(response_key) over (partition by
data_id) as tot_count
        from (SELECT * FROM
dw_reporting.bridge_questn_response_stg ORDER BY questn_key, response_key))
        where running_count = tot_count
        )
    )
group by questn_key,response_key
)

```

- 8 Save all the changes.
- 9 At the **Designer** tab, expand **DW\_Data\_Loads > Packages** option.
- 10 Expand the **PKG-LOAD\_FACT\_AGG\_TABLES\_PUBLISH** package.
- 11 Expand **Scenarios**.
- 12 Right click on the **PKG\_LOAD\_FACT\_AGG\_TABLES\_PUBLISH Version 001** scenario and select **Regenerate**.
- 13 Click **Ok** on the scenario regeneration box.
- 14 Continue with the tasks in the “Configuring the ODI”section of this guide

## Completing the OBIEE Installation

You install OBIEE for Analytics on the designated Reports server using the process described in the OBIEE installation documentation, located in the Oracle Fusion Middleware Online Documentation Library.

The Analytics installation copies an RPD (repository definition) file and a catalog that defines the Oracle Knowledge project, including the dashboards and reports.

After you install OBIEE, you must complete the following additional tasks to configure the Oracle Knowledge Analytics reporting components.

Perform the following tasks:

- Reset the RPD (repository) password
- Configure the connection between OBIEE and the data warehouse
- Deploy the RPD and catalog to create the Oracle Knowledge Analytics project within OBIEE
- Validate your installation

## Connect OBIEE to the Data Warehouse

Connect the OBIEE instance to the data warehouse by editing the database connection parameters in the RPD (repository) file that was installed as part of the Analytics installation process.

The following procedures describe how to edit the RPD file using the OBIEE Admin Tool. This tool only runs on the Windows platform. For information on installing and using the OBIEE Administrator tool, see the documentation located here:

[http://docs.oracle.com/cd/E29597\\_01/fusionapps.1111/e38322/appe\\_installbiadmin.htm](http://docs.oracle.com/cd/E29597_01/fusionapps.1111/e38322/appe_installbiadmin.htm)

**Important!** If you are using an SQL Server database, you must use Microsoft Data Access Components (MDAC), also known as Windows DAC, to define the ODBC data source and add and configure the appropriate driver. See <http://msdn.microsoft.com/en-us/library/windows/desktop/ms692872%28v=vs.85%29.aspx> for MDAC documentation resources.

**Note:** Copy the Analytics OBIEE components to a temporary directory on the Windows machine where the BI Administration Tool is installed.

## Open the RPD

Open the RPD file to configure it for your installation. Execute this task on a Windows machine using the OBIEE BI Administration Tool.

- 1 Open the Oracle BI Administration Tool.
- 2 Select File > Open > Offline.
- 3 Select the Oracle Knowledge Analytics RPD file.
- 4 Enter the default password: `password85`.

## Change the RPD Password

The RPD file is shipped with a default password. We strongly recommend that you change the default password to make sure you deploy the RPD and Catalog.

To change the RPD password:

- 1 Select File > Change Password.
- 2 Enter the default password: `password85`.
- 3 Enter the new password and confirm it.  
The repository password must be at least eight characters, with at least one numeric character. The New Password field cannot be empty.

## Save the RPD

Use this procedure to save the RPD.

- 1 Select File > Save.
- 2 Close the OBI Administration Tool.

## Configuring Connections to the Database

The next step is to configure the OBIEE connection to the data warehouse. This requires the creation of System ODBC data sources using the Windows Control Panel.

Use the following procedures to set the data source, set the reporting schema password, and check the connection to the reporting schema

### CONFIGURING SQL SERVER CONNECTIONS

When configuring the RPD to a SQL Server database, perform these steps to change the connection pool information:

- 1 Open the RPD using the OBI Admin tool.
- 2 Navigate to the **Physical Layer**.
- 3 Right-click on the **Oracle Data Warehouse**
- 4 Select **Properties**.  
The Properties window appears.
- 5 Select the **General** tab.
- 6 Under **Data source definition**, set the database to **SQL Server 2005**.
- 7 Select **Query DBMS**.
- 8 Select any connection in the **Features** tab.
- 9 Select **OK & Save**.

### CONNECTING TO THE REPORTING SCHEMA

To set the database connection properties:

- 1 In the OBI Administration Tool, Physical pane, select Oracle Data Warehouse > Oracle Data Warehouse Connection Pool.
- 2 Enter the ODBC data source name for the `DW_REPORTING` schema.
- 3 Enter the password for schema `DW_REPORTING` under Shared Logon.
- 4 Repeat for Oracle Data Warehouse > Oracle Data Warehouse Repository Initblocks Connection Pool.

#### To check the connection:

- 5 Select Oracle Data Warehouse > `DW_REPORTING` > `DIM_REPOSITORY`, and then select View Data.
- 6 Select Oracle Data Warehouse Connection Pool, then select Select, then select OK.  
If no data has been propagated from the staging schema to the reporting schema, the test succeeds.
- 7 Repeat this test, but select Oracle Data Warehouse Repository Initblocks Connection Pool instead of Oracle Data Warehouse Connection Pool.

## Deploy the RPD and Catalog

The RPD and catalog define the Oracle Knowledge Analytics project, including the dashboards and reports, that you access using the OBIEE user interface.

To deploy the catalog:

- 1 Navigate to OBIEE Enterprise Manager at `http://<hostname>:7001/em`, where `<hostname>` is the name of the server where OBIEE is installed.
- 2 Log in with the user name and password you used to install OBIEE.
- 3 On the left pane, select Business Intelligence/coreapplication.
- 4 On the right pane, select Lock and Edit Configuration. This prevents anyone else from making configuration changes at the same time. Wait for confirmation popup.
- 5 On the right pane, select Deployment/Repository.
- 6 Select Upload BI Server Repository > Choose File, and select the edited RPD file.
- 7 Copy the `analyticsReportingModel85V2` folder to the catalog directory at:  
`<OBIEE_INSTALL_DIR>\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\catalog`
- 8 At BI Presentation Catalog, change the catalog location to `$ORACLE_INSTANCE/bifoundation/OracleBIPresentationServicesComponent/$COMPONENT_NAME/catalog/analyticsReportingModel85V2`.
- 9 Enter the Repository password.
- 10 Select **Apply**.
- 11 Select **Activate Changes**.
- 12 Select **Restart to Apply Recent Changes**.
- 13 Select **Restart**.

The RPD is deployed and the catalog that defines the Oracle Knowledge Analytics project within OBIEE is added.



## Apply the Analytics Styles to the OBIEE User Interface

Analytics requires a specific set of styles and formats to display the reports as they are designed to be viewed. You must configure OBIEE to use the Analytics style information. You configure and deploy the Analytics styles by:

- copying the style directories from the installation location to the deployment location (designated in the installation step **Choose the OBIEE Components Location**)
- installing and deploying the styles on the application server
- making the styles available to OBIEE
- activating and validating the configuration

## Copy the Analytics Style Directories to the Deployment Location

The Analytics style directories contain the style and formatting information required for viewing Analytics reports on OBIEE. The Analytics installation process creates the following style directories at the location that you specify in the *Choosing the OBIEE Components Location* section of the *Installation Guide*:

- S\_OracleKnowledge
- SK\_OracleKnowledge

To add the Analytics style information to OBIEE, copy these directories to the following location in the OBIEE instance:

```
<OBIEE_INSTALL_DIR>\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\analyticsRes
```

## Install and Deploy the Analytics Styles

You install and deploy the Analytics styles by installing them as an application within WebLogic Server, using the WebLogic Administration Console.

To install and deploy the styles:

- 1 Start the **WebLogic Server Administration Console** at the following URL:  
`http://<localhost>:7001/console`
- 2 Select **Deployments** in the **Domain Structure** pane.  
WebLogic Server displays the **Summary of Deployments** page.
- 3 Select **Lock and Edit** in the **Change Center**
- 4 Select the **Install** button.  
WebLogic Server displays the **Install Application Assistant** page.
- 5 Specify the path to the location of the S\_OracleKnowledge folder using the following fields:
 

|                          |                                                                                                                                                                                                                                                                                              |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Path:</b>             | Specify the path to the parent of the AnalyticsRes directory where you copied the S_OracleKnowledge and SK_OracleKnowledge directories, for example:<br><code>&lt;OBIEE_INSTALL_DIR&gt;\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1</code> |
| <b>Current Location:</b> | Ensure that the server name and the specified path are correct.                                                                                                                                                                                                                              |

The Install Application Assistant displays a list of eligible subdirectories.

- 6 Select the **AnalyticsRes** directory, which contains the **S\_OracleKnowledge** and **SK\_OracleKnowledge** directories.

- 7 Select **Next** to continue.

The **Install Application Assistant** prompts you to choose the targeting style.

- 8 Select **Install this deployment as an application**.

- 9 Select **Next** to continue.

If you have server clusters defined in your environment, the **Install Application Assistant** prompts you to choose a deployment target.

- 10 Select the appropriate server in the **Clusters** section.

**Important!** In single-server environments, the **Install Application Assistant** does not display the Clusters section; you do not need to select a server.

- 11 Continue the installation process by accepting the defaults on the subsequent screens until the **Install Application Assistant** displays the following option:

I will make the deployment accessible from the following location

- 12 Select this option, and ensure that the Location field displays the correct path:

```
<OBIEE_INSTALL_DIR>\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\analyticsRes
```

- 13 Select **Finish**.

The **Install Application Assistant** displays the deployed application, which starts with the status **OK**.

## Make the Analytics Styles Available to OBIEE

You must make the styles that you have deployed available to the OBIEE presentation server by editing the OBIEE configuration.

To edit the OBIEE configuration:

- 1 Edit the `InstanceConfig.xml` file at the following location:

```
<OBIEE_INSTALL_DIR>\instances\instance1\config\OracleBIPresentationServicesComponent\coreapplication_obips1
```

- 2 Add the following markup to the `InstanceConfig.xml` file:

**Important!** You must place the `<URL>` and `<UI>` markup with the `<ServerInstance>` and `<WebConfig>` tags.

```
<URL>
  <CustomerResourcePhysicalPath><OBIEE_INSTALL_DIR>\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\analyticsRes</CustomerResourcePhysicalPath>
  <CustomerResourceVirtualPath>/analyticsRes</CustomerResourceVirtualPath>
</URL>
<UI>
  <DefaultStyle>OracleKnowledge</DefaultStyle>
  <DefaultSkin>OracleKnowledge</DefaultSkin>
</UI>
```

## Save and Activate the Configuration

You must save and activate the new configuration by saving your WebLogic Server configuration changes and restarting the application in Enterprise Manager.

To save your WebLogic Server configuration changes:

- 1 Select **Activate Changes** in the **Change Center**  
To restart the application:
  - a Start Enterprise Manager at the following URL:  
`http://<localhost>:7001/em`
  - b Select **Business Intelligence** from the hierarchy in the left pane, then select **coreapplication**. Enterprise Manager displays the **coreapplication Overview** tab.
  - c Select **Restart** under **Manage System** in the **System Shutdown and Startup** section.

## Linking to Information Manager Articles from Analytics Reports

You can configure Analytics so that the user interface displays article IDs in reports as links.

When users select the article ID, a configured instance of Information Center displays the article in preview mode. See the *Analytics Administration Guide*, “Enabling Links to Information Manager Articles from Analytics Reports” section for more information. It is located here:.

## Validating the OBIEE Installation

Until the first set of data transforms occurs, you cannot validate the report installation. You can verify the RPD connection to the database by opening the RPD in online mode and browsing the data directly in the RPD. There won't be any data in most of the tables but you should be able to connect and see data in the DIM\_DATE table.

You can log onto the OBIEE reporting user interface to validate the installation and configuration process. You can validate the installation process by logging onto the application at: `http://<hostname>:7001/analytics` using the credentials you specified during installation.

The Oracle Knowledge Analytics Home Page displays the preconfigured dashboards. You can open one, such as Search Analysis, to validate the installation. You can now perform other administrative tasks, as described in the *Oracle Knowledge Analytics Administration Guide*.

## Manage the JMS Event Router for Analytics

You manage the Analytics Event Router using the processes described in this section.

### Manage the Analytics Event Router from the WebLogic Admin Console

Start the Analytics Event Router by starting the specified managed server through the WebLogic Administration Console.

Start managed servers through the WebLogic Administration Console by using the WebLogic Server node manager. Make sure the node manager is running.

**Note:** If the Node Manager service was not installed as part of the WebLogic Server installation, you can install it as a service on Windows. Follow the instructions for installing and uninstalling the Node Manager Service in the post-installation section of the Oracle Fusion Middleware Installation Guide for Oracle WebLogic Server 11g.

If you do not want the node manager running as a service on Windows, or you are using Linux, start the Node Manager manually.

To start the Node Manager service manually:

- 1 Open a command prompt.
- 2 Navigate to the `<weblogic_dir>/Middleware/wlserver_10.3/server/bin` directory, where `<weblogic_dir>` is the installation directory of your WebLogic Server.
- 3 On Linux, execute `startNodeManager.sh`. On Windows, execute `startNodeManager.cmd`.
- 4 The node manager continues running in the command prompt.

To start or stop the managed server from the WebLogic Administration Console:

- 5 Start the Administration Server (if it is not running).
- 6 Using a Web browser, navigate to the WebLogic Administration Console URL. (This can be found at `http://<Administration Server Listen Address>:<Administration Server Listen Port>/console`.)
- 7 Provide the Administration Server's credentials to log in.
- 8 From the *Domain Structure* section, expand the **Environment**.
- 9 Select **Servers** to manage and control the **Managed Server**.
- 10 Select the *Control* tab to start and stop the **Managed Server**.
- 11 Select the check box of the **Managed Server** specified in the installation process.
- 12 Select **Start** or **Shutdown/Force Shutdown Now**.  
The **State** of the server now reflects that the server is **STARTING** or **FORCE\_SUSPENDING**.
- 13 Select the Refresh icon above the table of servers.  
When the State of the server shows that the server is running, you can access the Analytics Event Router application.

When the State shows SHUTDOWN, the server must be restarted to access the Analytics Event Router application.

## Install the Analytics Event Router Service (Windows)

To install the Analytics Event Router Service on Windows:

- 1 Open a command prompt and cd into `$Oracle_Knowledge_Analytics_ROOT/instances/<Instance_Name>` where `<Instance_Name>` refers to the Analytics Event Router instance name on this installation. Execute `setenv.bat` to open the Common Environment.
- 2 Install the Analytics Event Router service by executing the following command in the Common Environment:

`inquiraanservice -install` Uninstall the Analytics Event Router service by executing the following command in the Common Environment:

`inquiraanservice -uninstall`

## Manage the Analytics Event Router from the Common Environment

You manage the Analytics application using the following Common Environment commands.

Open a command prompt and cd into `$Oracle_Knowledge_ROOT/instances/<Instance_Name>`, where `<Instance_Name>` refers to the Analytics Event Router instance name on this installation. Execute `setenv.sh` on Linux or `setenv.bat` on Windows to open the Common Environment.

| Command                                                                                                                                           | Description                                           |
|---------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• <code>inquiraan.sh start</code> (Linux)</li> <li>• <code>inquiraan start</code> (Windows)</li> </ul>     | Starts the Analytics Event Router service             |
| <ul style="list-style-type: none"> <li>• <code>inquiraan.sh stop</code> (Linux)</li> <li>• <code>inquiraan stop</code> (Windows)</li> </ul>       | Stops the Analytics Event Router service              |
| <ul style="list-style-type: none"> <li>• <code>inquiraan.sh restart</code> (Linux)</li> <li>• <code>inquiraan restart</code> (Windows)</li> </ul> | Stops and restarts the Analytics Event Router service |

**Note:** The commands `inquiraan.sh/inquiraan restart` and `inquiraan.sh/inquiraan stop` can only be executed successfully when the application is started by executing the `inquiraan.sh start` and `inquiraan start` commands.



# Installing AnswerFlow

This section describes the process of installing Oracle Knowledge AnswerFlow. AnswerFlow provides automated guidance that allows agents to increase their productivity and improve service quality. It leverages contextual data and external systems to apply diagnostics and resolve complex service processes with guided knowledge delivery.

This section explains:

- **Installation Requirements**
- **Configuring Information Manager**
- **Running the AnswerFlow Installer**
- **Completing the Installation**

## Installation Requirements

Before running the AnswerFlow installation program:

- Create a dedicated AnswerFlow repository in Information Manager. You will need the Repository Reference Key of this repository during the AnswerFlow installation process.
- Ensure that Oracle WebLogic Server is installed, and the Node Manager and Admin Servers are running
- Ensure that you have configured an Oracle WebLogic Server domain.

**Important!** Activate any changes to the WebLogic Server domain. The domain cannot be in edit mode while the installer is running.

- Note the Information Manager Web Services URL, the Information Manager Resources URL, and the Information Manager Console URL for the instance of Information Manager that you are configuring AnswerFlow with; you will need to supply these values during installation.

## Configuring Information Manager

Before you install AnswerFlow, configure the following Information Manager functions.

## Creating and Assigning Categories

For a category to be visible to a user in AnswerFlow Editor or AnswerFlow SampleUI, the category must be assigned to the AnswerFlow channel, and the category or a category above it hierarchically must be assigned to the user.

- 1 Create a Repository in the Information Manager instance. Name the repository `AnswerFlow` and point it to `AnswerFlow` in Schema Properties
- 2 In the Information Manager Console, go to Repository, then Categories. Create Categories and Subcategories for the Object Library used to navigate AnswerFlow processes and objects.  
For information on creating categories and subcategories, see “Adding a Content Category” in the Oracle Knowledge Information Manager Administration Guide.
- 3 In the Information Manager Console, go to Users, then Console Users, and then List.
- 4 Click the name of the user to assign Management Console User Properties.
- 5 Click Edit User to access the User details page.
- 6 In the Categories section, from the Available Categories, move to the Selected Categories each category that you want to assign to the user.  
For information on creating users, see “Management Console User Properties” in Oracle Knowledge Information Manager Administration Guide.
- 7 In the Information Manager Management Console, assign categories to users.
- 8 In the Repository tab in Information Manager, AnswerFlow screen Development Data Schema Properties, create the AnswerFlow Channel.

## Creating an AnswerFlow Channel

The Information Manager channel that you create is used to determine the Information Manager categories for AnswerFlow objects, and to store the promoted top-level process documents.

**Note:** The AnswerFlow installation process prompts you for the channel reference key.

To create a channel:

- 1 In the repository where you plan to promote the AnswerFlow data, create a channel and give it a unique name.  
The Information Manager channel that you create is used to determine the Information Manager categories for AnswerFlow objects, and to store the promoted top-level process documents.
- 2 In Category Options, move the relevant categories from Available Categories to Selected Categories.  
**Note:** The categories are navigation filters.
- 3 In the channel that you created, create the schema, create the node (System Data), and all the attributes beneath the node as shown in the following table.

**Important!** Do not change the System Data node and its attributes; name and define the node and its attributes only as noted in the following table. It is critical to name the attributes as shown and confirm that the reference keys are as specified.

| Nodes and Attributes | Field Type         | Reference Key   |
|----------------------|--------------------|-----------------|
| -Root                |                    |                 |
| --System Data        | non-repeating node | SYSTEM_DATA     |
| ---Process Name      | *MT - Text Field   | PROCESS_NAME    |
| ---Process Version   | *T - Integer       | PROCESS_VERSION |
| ---Process ID        | *T - Text Field    | PROCESS_ID      |



| Nodes and Attributes    | Field Type       | Reference Key        |
|-------------------------|------------------|----------------------|
| ---Promotion ID         | *T - Text Field  | PROMOTION_ID         |
| ---Tags                 | TA - Text Field  | TAGS                 |
| ---Submission Notes     | *T - Text Area   | SUBMISSION_NOTES     |
| ---Submitted By         | *TA - Text Field | SUBMITTED_BY         |
| ---Submission Date      | *A - Date/Time   | SUBMISSION_DATE      |
| ---Preview URL          | * - Text Field   | PREVIEW_URL          |
| ---View Detail URL      | * - Text Field   | VIEW_DETAIL_URL      |
| ---Promotion URL        | * - Text Field   | PROMOTION_URL        |
| ---Compiled Data        | Text Area        | COMPILED_DATA        |
| ---Compiled Data Format | *T - Text Field  | COMPILED_DATA_FORMAT |

\* - Required Field; M - Master Identifier; T - Included in full text search; A - Available in attribute search

**Note:** You may add other nodes to the root element, as long as you specify the System Data node and its attributes as listed above.

## Running the AnswerFlow Installer

Start the installer by locating and executing the appropriate version of the installer for your environment.

## Starting the Installer in Windows Environments

On Windows 2008, the user must be part of the Administrators group to install and operate Oracle Knowledge products.

To start the installer in Windows environments:

Double-click the installation file:

– or –

Run the file using the command line with the following command:

```
install_answerflow_<app_server>_<operating_system>_build_<#>.exe
```

## Starting the Installer in Linux Environments

On Linux, Oracle Knowledge software must be installed using a non-root user. Before running the installer, create a standard Oracle Knowledge admin (Linux) user in the operating system. This user installs and runs the Oracle Knowledge software and must be given permission to access network shares while running as a service.

To start the installer in Linux environments:

- 1 Open a bash shell by entering bash command:

```
bash
```

- 2 Use `cd` to go to the installer temporary directory.

- 3 Set the default locale for the bash shell to `en_US` by entering the following:

```
export LC_ALL="en_US"
```

- 4 Set permissions on the binary files so that they are executable by entering:

```
chmod +x *.bin
```

- 5 Start the installer:

```
./install_answerflow_<app_server>_<operating_system>_build_<#>.bin
```

When the initialization progress dialog completes, the installer displays the introduction screen. The Installation Introduction screen recommends that all other programs running be stopped and provides information on operating the installer.

- 6 Select **Next** to continue.

The Choose Install Folder screen opens.

## Choosing the Installation Folder

Select the directory location where you want to install AnswerFlow. You install AnswerFlow within an instance of Information Manager. You have the option to choose the default, recommended installation directory:

- Linux: `home/<user_name>/Oracle/Knowledge/AnswerFlow`
- Windows: `C:\Oracle\Knowledge\AnswerFlow`

Although you can install at any location, the recommended location is the base Oracle Knowledge application directory.

The screenshot shows the 'Choose Install Folder' dialog box. On the left is a vertical sidebar with the Oracle Knowledge logo and a list of installation steps: Introduction (selected), Set Keystore Location, Confirm DB Creation, Set Database Parameters, Confirm Installation, Set Configuration Values, Connection Parameters, Pre-Installation Summary, Installing..., and Install Complete. The main area has a title bar 'Choose Install Folder' and a text box with the instruction 'Choose the installation folder for installing AnswerFlow.' Below this is a section titled 'Select Installation directory:' with a text input field containing the path '/scratch/qagroup/apps/AF86\_Demo'. To the right of the input field are two buttons: 'Restore Default Folder' and 'Choose...'. At the bottom of the dialog are three buttons: 'Cancel', 'Previous', and 'Next'. A progress bar at the bottom left is labeled 'InstallAnywhere'.

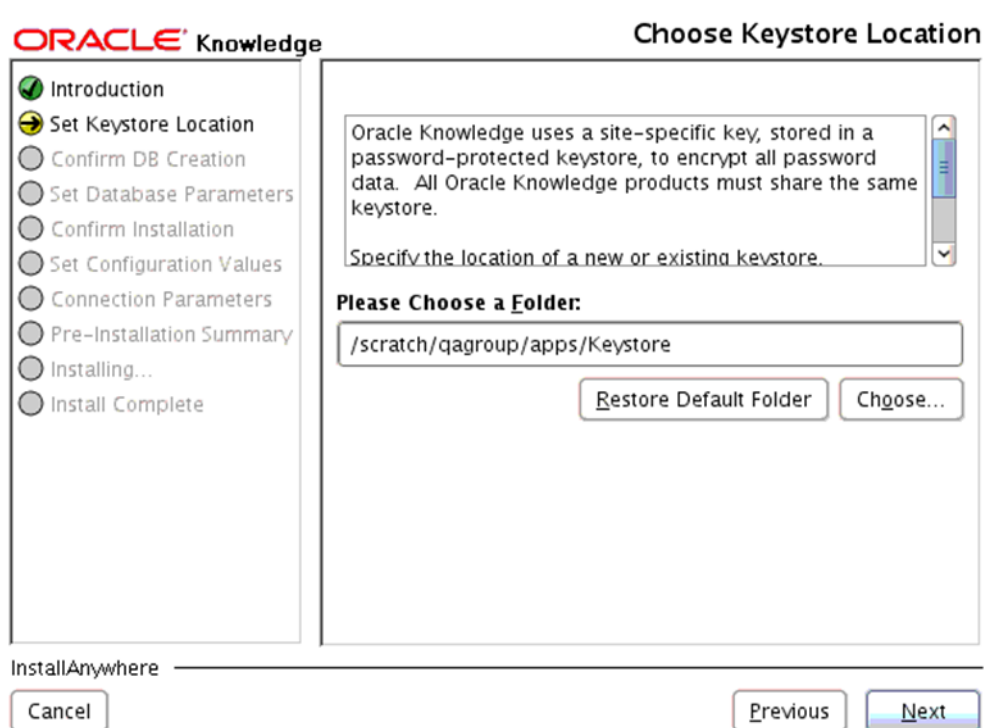
- 1 Select **Choose** to open a file browser and select an alternate Oracle Knowledge base directory. Use the **Restore Default Folder** option to reset the default installation directory, if necessary.
- 2 Select **Next** to continue.  
The Choose Keystore Location screen opens.

## Setting the Keystore Location

Specify the location of the Oracle Knowledge keystore.

**Important!** If you have created a keystore while installing another Oracle Knowledge product, use the keystore created during that installation by selecting its location.

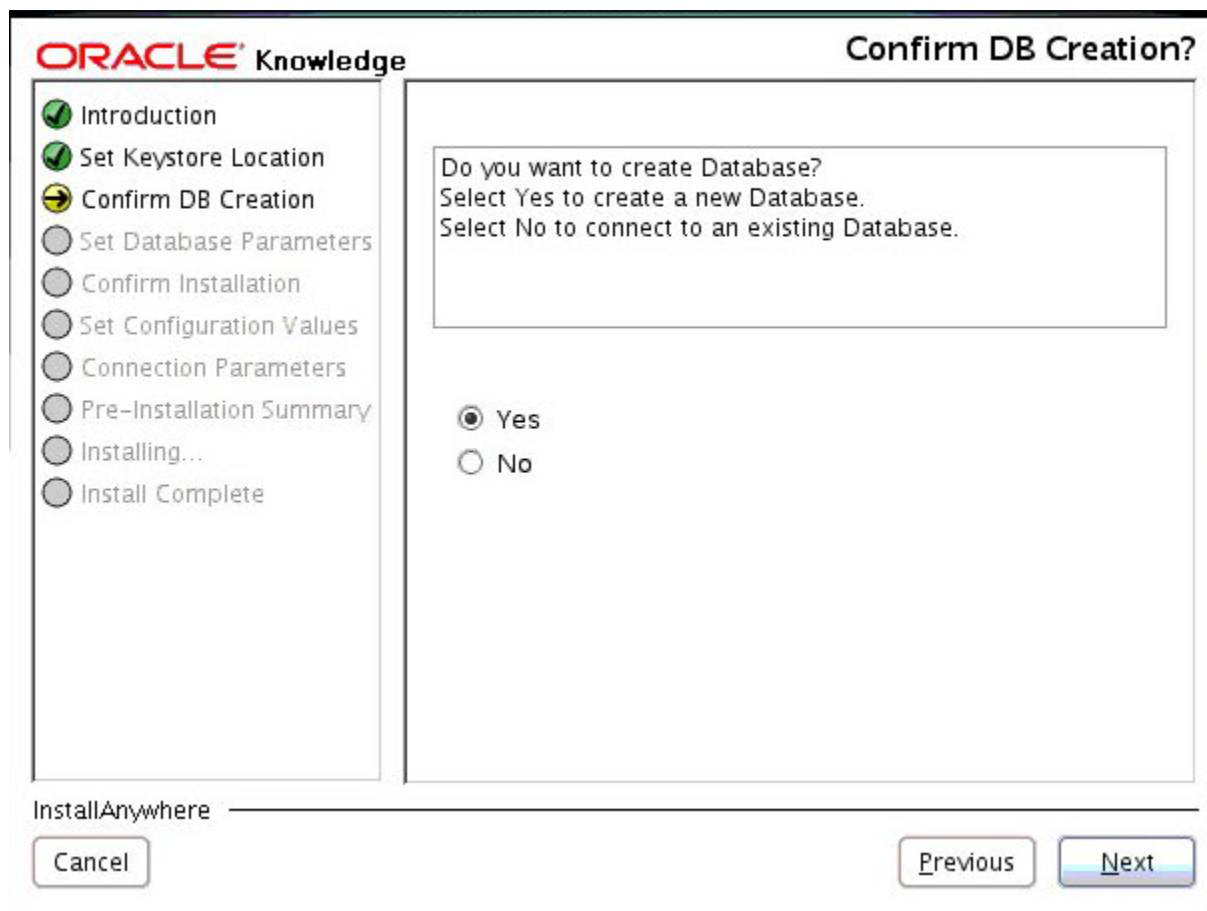
For more information about the keystore, see “Creating the Oracle Knowledge Keystore” on page 24.



- 1 Specify the location of an existing Keystore.
- 2 Select **Next** to continue.  
The Confirm Database Creation screen opens.

## Confirming Database Creation

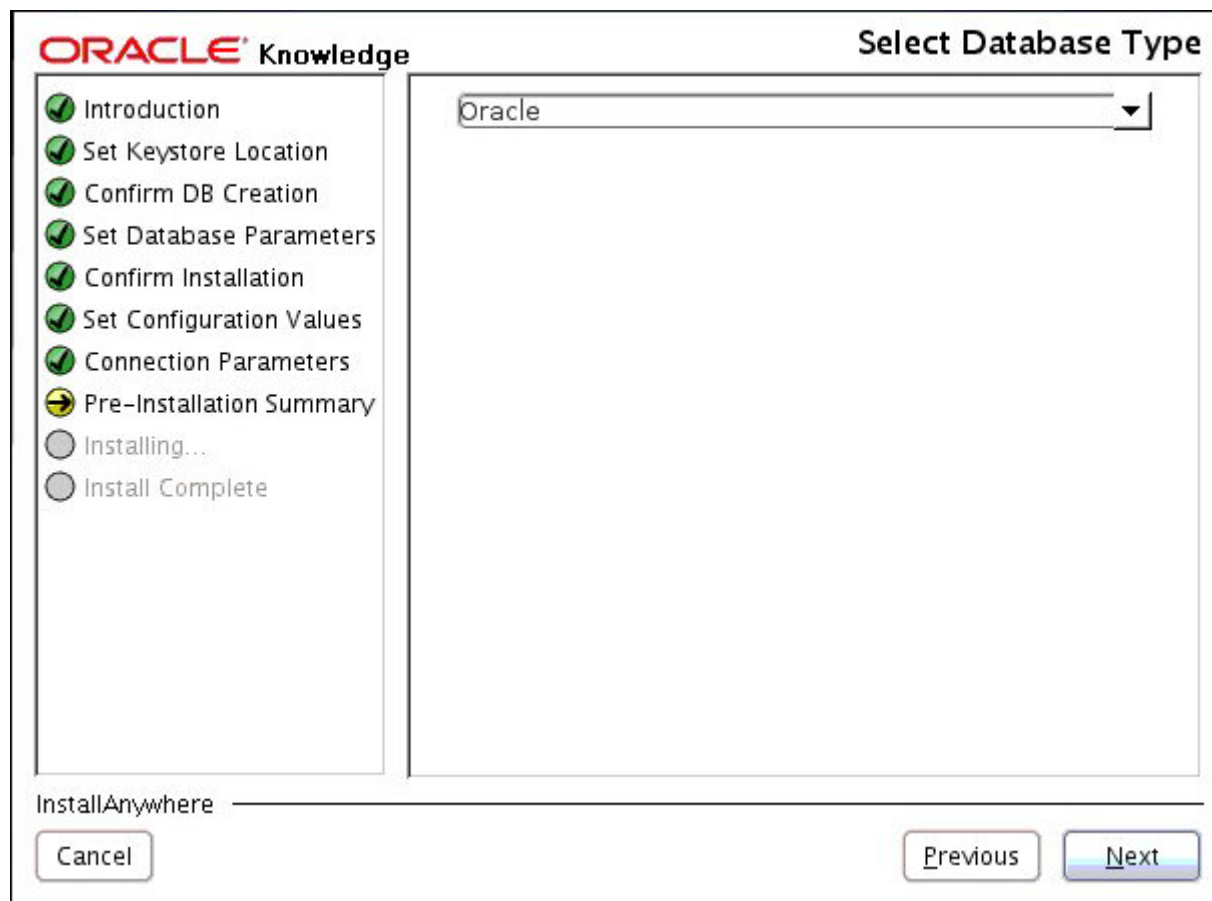
Choose to either create a new database or to connect to an existing database. You configure AnswerFlow to use an existing Information Manager database, or to use a separate dedicated database. You can configure AnswerFlow to use any database that Oracle Knowledge supports.



- 1 In the Confirm DB Creation? window, select either:
  - To create a new database, click **Yes**.
  - To connect to an existing database, click **No**.
- 2 Click **Next** to continue.  
The Select Database Type screen opens.

## Selecting the Database Type

Choose the type of database that you will create or connect to.



- 1 In the Select Database Type window, select the type of database from the drop-down list.
- 2 Click **Next** to continue.  
The Set Database Parameters screen opens.

## Setting the Database Parameters

Enter credentials for the AnswerFlow database and DataSource Name.

**ORACLE Knowledge** **Set Database Parameters**

Please provide credentials of AnswerFlow Database and DataSource Name.

**Database User**

**Database Password**

**Re-enter Database Password**

**Database JDBC URL**  
jdbc:oracle:thin:@slc01oot.us.oracle.com:1521:XF

InstallAnywhere

Cancel Previous Next

- 1 In the Set Database Parameters window, enter the required information about the AnswerFlow database and DataSource Name.
- 2 Select **Next** to continue.  
The Choose the Java Home Directory screen opens.

## Choosing the Java Home Directory

Specify the parent directory of the bin directory for the JDK used by Oracle WebLogic Server. For example, `C:\Oracle\Middleware\jdk170_71` on Windows or `usr/lib/jvm/jdk170_71` on Linux. This must be the same `JAVA_HOME` directory used by the Oracle WebLogic Server.

**ORACLE Knowledge**

**Choose the WebLogic Java Home Directory**

Please choose the Java Home used by WebLogic (the parent directory of the JDK's bin directory).

**Please Choose a Folder:**

/scratch/qagroup/Installers/jdk1.7.0\_71

Restore Default Folder Choose...

Cancel Previous Next

- 1 In the Choose the WebLogic Java Home Directory window, select the parent directory of the JDK's bin directory.
- 2 Click **Next** to continue.  
The Choose WebLogic Middleware Installation Directory screen opens.



## Choosing the WebLogic Middleware Installation Directory

Select the WebLogic middleware home directory:

- 1 In the Please Choose a Folder field, choose the middleware home directory for WebLogic.

**ORACLE Knowledge** Choose WebLogic Middleware Install Directory

Introduction  
Set Keystore Location  
Confirm DB Creation  
Set Database Parameters  
Confirm Installation  
Set Configuration Values  
Connection Parameters  
Pre-Installation Summary  
Installing...  
Install Complete

Please enter the directory configured as Middleware\_Home (for Weblogic 11g) or Oracle\_Home (for Weblogic 12c).

**Please Choose a Folder:**

/scratch/qagroups/weblogic

Restore Default Folder Chgose...

InstallAnywhere

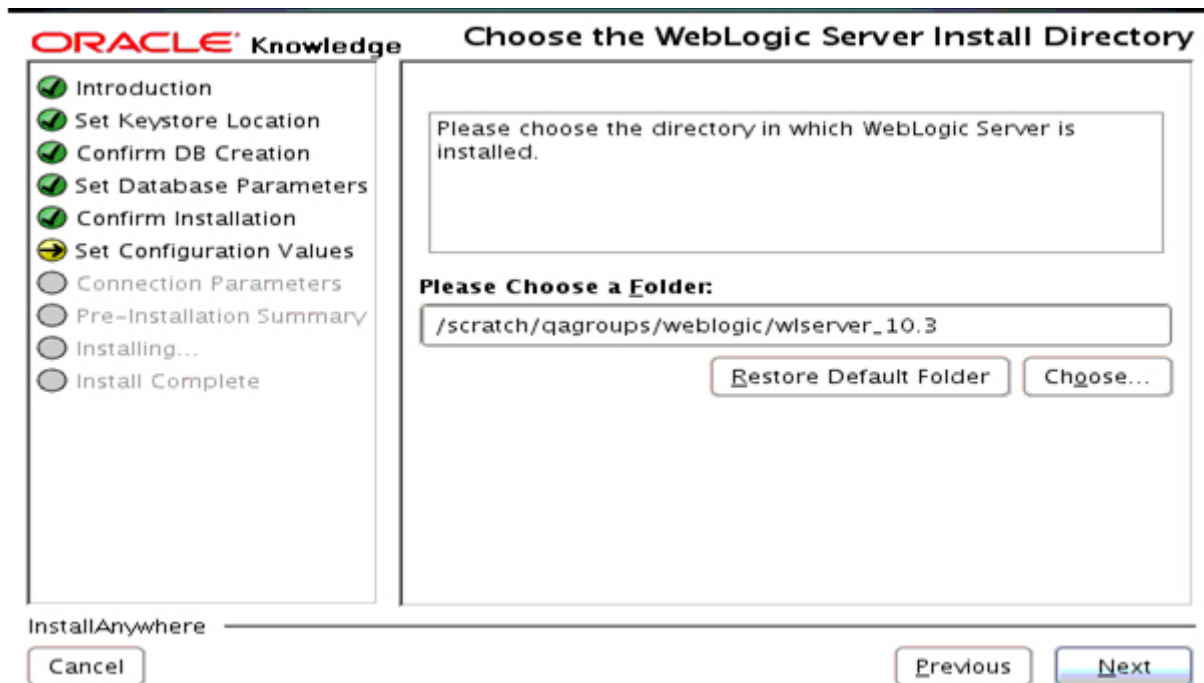
Cancel Previous Next

- 2 Click **Next** to continue.  
The Choose the WebLogic Server Install Directory screen opens.

## Choosing the Oracle WebLogic Server Installation Directory

Select the directory in which Oracle WebLogic Server is installed:

- 1 In the Please Choose a Folder field, choose the installation directory of the WebLogic server, for example, C:\Oracle\Middleware\wlserver\_10.3.



- 2 Select **Next** to continue.

An Information window opens, showing the WebLogic Server Details.



- 3 Click **OK**.

The Choose a WebLogic Domain screen opens.

## Choosing an Oracle WebLogic Server Domain

Specify the details of an Oracle WebLogic server domain:

The screenshot shows the 'Choose a WebLogic Domain' dialog box. On the left is a sidebar with the 'ORACLE Knowledge' logo and a list of installation steps: Introduction, Set KeyStore Location, Confirm DB Creation, Set Database Parameters, Confirm Installation, Set Configuration Values (highlighted with a yellow arrow), Connection Parameters, Pre-Installation Summary, Installing..., and Install Complete. The main area contains a text box with instructions: 'Please specify the name and location of your WebLogic Domain where the Oracle Knowledge Applications will be installed.' Below this are two input fields: 'WebLogic Domain Name' with the value 'base\_domain' and 'WebLogic Domain Path' with the value 'oup/apps/Weblogic/user\_projects/domains/base\_domain'. There are 'Restore Default' and 'Choose...' buttons next to the path field. At the bottom are 'Cancel', 'Previous', and 'Next' buttons. The 'Next' button is highlighted with a blue gradient.

- 1 Specify the name and location of the Oracle WebLogic Server domain where you will install the Oracle Knowledge Applications.
- 2 Select **Next** to continue.  
The Set Oracle WebLogic Server Administrator Credentials screen opens.

## Setting Oracle WebLogic Server Administrator Credentials

Provide the administrator credentials for the server of the specified domain.

**ORACLE Knowledge** **Set WebLogic Administrator Credentials**

Introduction  
 Set Keystore Location  
 Confirm DB Creation  
 Set Database Parameters  
 Confirm Installation  
 ➔ Set Configuration Values  
 Connection Parameters  
 Pre-Installation Summary  
 Installing...  
 Install Complete

Please provide the credentials to the administration server of the specified domain.

-----

**Administrator User Password**

**Re-enter Administrator User Password**

**Administration Server URL**  
 t3://slc01phj.us.oracle.com:7001

InstallAnywhere

Cancel Previous Next

- 1 Provide the following credentials:

| Property                    | Description                                                                                                                             |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| Administrator User Name     | Specify the user name of the user used to boot the administration server.                                                               |
| Administrator User Password | Specify the password of the user used to boot the administration server.                                                                |
| Administration Server URL   | Specify the <protocol>://<listen address>:<listen port> used to connect to the administration server. For example, t3://localhost:7001. |

- 2 Select **Next** to continue.  
 The Confirm Installation screen opens.

## Installing Editor and Runtime

In the Confirm Installation screen, select whether or not to install AnswerFlow Editor and Runtime.

**ORACLE Knowledge** **Confirm Installation**

Introduction  
Set Keystore Location  
Confirm DB Creation  
Set Database Parameters  
→ Confirm Installation  
Set Configuration Values  
Connection Parameters  
Pre-Installation Summary  
Installing...  
Install Complete

Do you want to install Editor and Runtime

☒ Editor  
☒ Runtime

InstallAnywhere

Cancel Previous Next

- 1 To install Editor, select the **Editor** check box.
- 2 To install Runtime, select the **Runtime** check box.
- 3 Click **Next** to continue.  
The Managed Server for Editor Webapp screen opens.

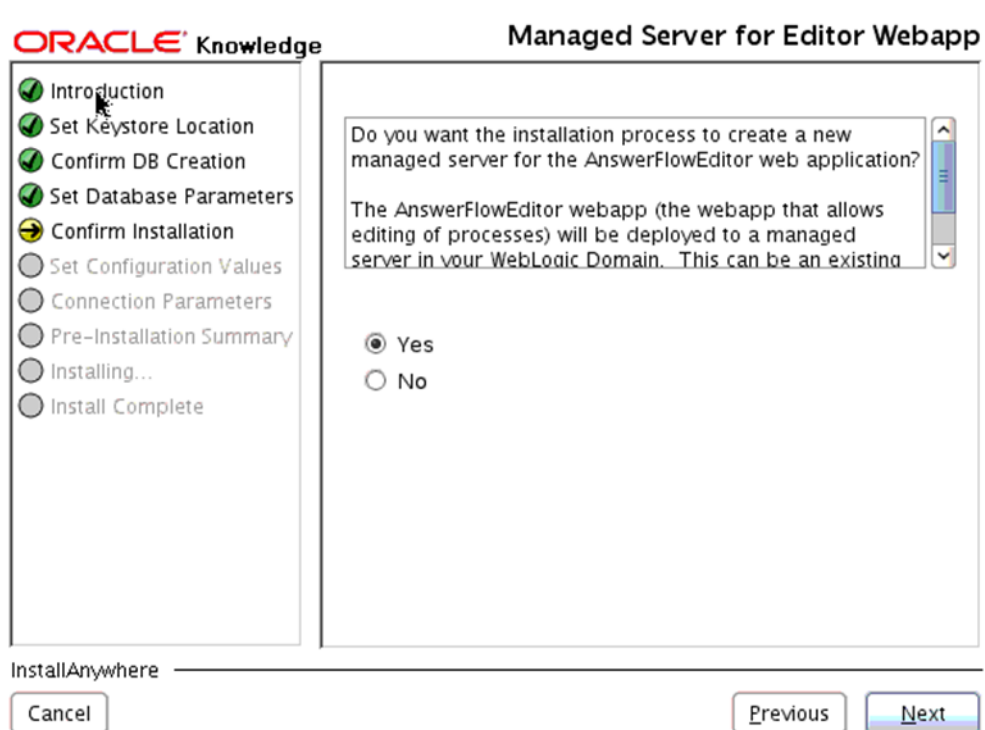
## Configuring the AnswerFlow Editor Managed Server (Oracle WebLogic Server)

To configure the AnswerFlow Editor managed server, you will do the following procedures:

- **Selecting or Creating the AnswerFlow Editor Web Application Managed Server**
- **Setting Values for Editor Managed Server (New) or Setting Values for Editor Managed Server (Existing)**
- **Setting Java Options for Editor Web Application Server**

### Selecting or Creating the AnswerFlow Editor Web Application Managed Server

Select whether to create a new managed server or use an existing managed server for the AnswerFlow Editor web application.



- 1 To create a new managed server for the AnswerFlow Editor webapp, select **Yes**. To deploy AnswerFlow Editor to an existing managed server, select **No**.

The Set Editor Managed Server Values screen opens.

### Setting Values for Editor Managed Server (New)

If you have selected to create a new managed server for the Editor web application, the installation program uses the credentials of the administration server to boot the new managed server. The new managed server must be associated with a machine. The installation process can create a new machine or you can provide the name of an existing machine in your domain.

**ORACLE Knowledge** Set Editor Managed Server Values

- Introduction
- Set Keystore Location
- Confirm DB Creation
- Set Database Parameters
- Confirm Installation**
- Set Configuration Values
- Connection Parameters
- Pre-Installation Summary
- Installing...
- Install Complete

**Managed Server Name**  
AnswerFlowEditorServer

**Listen Address**  
slc01oot.us.oracle.com

**Listen Port**  
8232

**Machine Name**  
Editor\_Machine

**Editor URL**  
http://slc01oot.us.oracle.com:8232

**Is this an existing machine in your domain?**  
☐ Yes  
☒ No

InstallAnywhere

Cancel Previous Next

**1** Specify the following properties:

| Property                                                                                     | Description                                                                                                                                                                                                       |
|----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Managed Server Name                                                                          | Specify the name of the new managed server. Ensure that the name is unique to your domain.                                                                                                                        |
| Listen Address                                                                               | Specify the listen address of the new managed server. The default value is the local address of the machine running the installation program.                                                                     |
| Listen Port                                                                                  | Specify the listen port of the new managed server. The default value is 8232.                                                                                                                                     |
| Machine Name                                                                                 | Specify the name of the machine in the domain that the new managed server is associated with. If this is a new machine, ensure that the name is unique to your domain.                                            |
| Editor URL (or AnswerFlowEditorURL if you are installing with the Tomcat application server) | Enter the URL in the format: <code>http://&lt;hostname&gt;:8232</code><br>The installer's default format for this field is incorrect; ensure that you do not include the qualifier <code>/AnswerFlowEditor</code> |
| Is this an existing machine in your domain?                                                  | Select <b>Yes</b> if you are providing the name of an existing machine in your domain. Select <b>No</b> if you want the installation program to create a new machine with this name.                              |

**2** Select **Next** to continue.

The Java Options for Editor Webapp's Server screen opens.

## Setting Values for Editor Managed Server (Existing)

If you have selected to provide an existing managed server for the Editor web application, the installation program uses the credentials provided to boot the managed server.

**ORACLE Knowledge**

**Set Editor Managed Server Values**

NOTE: Provide user name and password used when booting the managed server if they are set. Leave blank if they are not set and the credentials of the administration server will be used to boot this server.

**Managed Server Name**  
AnswerFlowEditorServer

**Listen Address**  
slc0100t.us.oracle.com

**Listen Port**  
8232

**User Name**  
weblogic

InstallAnywhere

Cancel Previous Next

If credentials for the managed server are not set, leave the **User Name** and **User Password** fields blank and the credentials of the administration server are used to boot the managed server.

- 1 Specify the following properties:

| Property            | Description                                                         |
|---------------------|---------------------------------------------------------------------|
| Managed Server Name | Specify the name of the existing managed server.                    |
| Listen Address      | Specify the listen address of the existing managed server.          |
| Listen Port         | Specify the listen port of the existing managed server.             |
| User Name           | Specify the user name of the user used to boot this managed server. |
| User Password       | Specify the password of the user used to boot this managed server.  |

- 2 Select **Next** to continue.

The Java Options for Editor Webapp's Server screen opens.



## Setting Java Options for Editor Web Application Server

Specify the Java memory options used to start the Editor web application server.

**ORACLE Knowledge**

**Java Options for Editor Webapp's Server**

Introduction  
Set Keystore Location  
Confirm DB Creation  
Set Database Parameters  
Confirm Installation  
Set Configuration Values  
Connection Parameters  
Pre-Installation Summary  
Installing...  
Install Complete

Memory Allocation Pool Initial Size (-Xms in Megabytes)  
2800

Memory Allocation Pool Maximum Size (-Xmx in Megabytes)  
2800

Maximum Permanent Generation Size (-XX:MaxPermSize in Megabytes)  
256

InstallAnywhere

Cancel Previous Next

- 1 Specify the following Java memory options:

| Property                            | Description                                                      |
|-------------------------------------|------------------------------------------------------------------|
| Memory Allocation Pool Initial Size | The initial and minimum Java heap size in megabytes.             |
| Memory Allocation Pool Maximum Size | The maximum Java heap size in megabytes.                         |
| Maximum Permanent Generation Size   | The maximum size for the permanent generation heap in megabytes. |

- 2 Select **Next** to continue.  
The Managed Server for RuntimeUI Webapp screen opens.

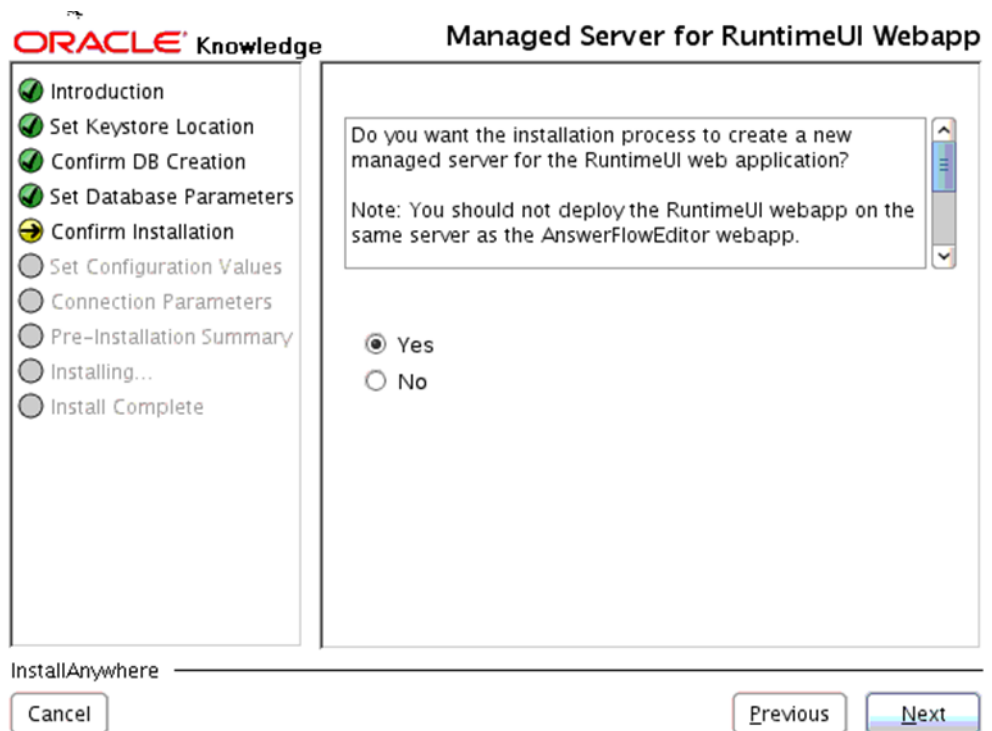
## Configuring the RuntimeUI Managed Server (Oracle WebLogic Server)

Configuring the RuntimeUI managed server consists of the following procedures:

- **Selecting or Creating the RuntimeUI Web Application Managed Server**
- **Setting Values for RuntimeUI Managed Server (New) or Setting Values for RuntimeUI Managed Server (Existing)**
- **Setting Java Options for the RuntimeUI Web Application Server**

### Selecting or Creating the RuntimeUI Web Application Managed Server

Select whether you want to create a new managed server or use an existing managed server for the AnswerFlow RuntimeUI web application. This server should be different from the server that contains the AnswerFlow Editor web application.



- To create a new managed server for the AnswerFlow RuntimeUI web application, click **Yes**.  
The Set RuntimeUI Managed Server Values screen opens when you click **Next**.
- To deploy AnswerFlow RuntimeUI to an existing managed server, click **No**.  
The Set RuntimeUI Managed Server Values opens when you click **Next**.

## Setting Values for RuntimeUI Managed Server (New)

If you have selected to create a new managed server for the RuntimeUI web application, the installation program uses the credentials of the administration server to boot the new managed server. The new managed server must be associated with a machine. The installation process can create a new machine or you can provide the name of an existing machine in your domain.

**ORACLE Knowledge**

**Set RuntimeUI Managed Server Values**

☒ Introduction  
☒ Set Keystore Location  
☒ Confirm DB Creation  
☒ Set Database Parameters  
☒ **Confirm Installation**  
☐ Set Configuration Values  
☐ Connection Parameters  
☐ Pre-Installation Summary  
☐ Installing...  
☐ Install Complete

**Managed Server Name**  
 AnswerFlowRuntimeUIServer

**Listen Address**  
 slc01oot.us.oracle.com

**Listen Port**  
 8233

**Machine Name**  
 RuntimeUI\_Machine

**Is this an existing machine in your domain?**  
☐ Yes  
☒ No

InstallAnywhere

Cancel Previous Next

1 Specify the following properties:

| Property                                    | Description                                                                                                                                                            |
|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Managed Server Name                         | Specify the name of the new managed server. Ensure that the name is unique to your domain.                                                                             |
| Listen Address                              | Specify the listen address of the new managed server. The default value is the local address of the machine running the installation program.                          |
| Listen Port                                 | Specify the listen port of the new managed server. The default value is 8233.                                                                                          |
| Machine Name                                | Specify the name of the machine in the domain that the new managed server is associated with. If this is a new machine, ensure that the name is unique to your domain. |
| Is this an existing machine in your domain? | Select Yes if you are providing the name of an existing machine in your domain. Select No if you want the installation program to create a new machine with this name. |

2 Click **Next** to continue.

The Java Options for RuntimeUI Webapp's Server screen opens.

## Setting Values for RuntimeUI Managed Server (Existing)

If you have selected to provide an existing managed server for the RuntimeUI web application, the installation program uses the credentials provided to boot the managed server. If credentials for the managed server are not set, leave the **User Name** and **User Password** fields blank and the credentials of the administration server are used to boot the managed server. Please note that you should not use the same managed server that you used for Editor.

**ORACLE Knowledge**

- Introduction
- Set Keystore Location
- Confirm DB Creation
- Set Database Parameters
- Confirm Installation**
- Set Configuration Values
- Connection Parameters
- Pre-Installation Summary
- Installing...
- Install Complete

**Set RuntimeUI Managed Server Values**

NOTE: Provide user name and password used when booting the managed server if they are set. Leave blank if they are not set and the credentials of the administration server will be used to boot this server.

-----

8233

**User Name**

weblogic

**User Password**

\*\*\*\*\*

**Re-enter User Password**

\*\*\*\*\*

InstallAnywhere

Cancel Previous Next

- 1 Specify the following properties:

| Property            | Description                                                         |
|---------------------|---------------------------------------------------------------------|
| Managed Server Name | Specify the name of the existing managed server.                    |
| Listen Address      | Specify the listen address of the existing managed server.          |
| Listen Port         | Specify the listen port of the existing managed server.             |
| User Name           | Specify the user name of the user used to boot this managed server. |
| User Password       | Specify the password of the user used to boot this managed server.  |

- 2 Select **Next** to continue.

The Java Options for RuntimeUI Webapp's Server screen opens.

## Setting Java Options for the RuntimeUI Web Application Server

Specify the Java memory options used to start the RuntimeUI web application server.

**ORACLE Knowledge** **Java Options for RuntimeUI Webapp's Server**

- Introduction
- Set Keystore Location
- Confirm DB Creation
- Set Database Parameters
- Confirm Installation**
- Set Configuration Values
- Connection Parameters
- Pre-Installation Summary
- Installing...
- Install Complete

**Memory Allocation Pool Initial Size (-Xms in Megabytes)**  
2800

**Memory Allocation Pool Maximum Size (-Xmx in Megabytes)**  
2800

**Maximum Permanent Generation Size (-XX:MaxPermSize in Megabytes)**  
256

InstallAnywhere

Cancel Previous Next

- 1 Specify the following Java memory options:

| Property                            | Description                                                      |
|-------------------------------------|------------------------------------------------------------------|
| Memory Allocation Pool Initial Size | The initial and minimum Java heap size in megabytes.             |
| Memory Allocation Pool Maximum Size | The maximum Java heap size in megabytes.                         |
| Maximum Permanent Generation Size   | The maximum size for the permanent generation heap in megabytes. |

- 2 Select **Next** to continue.  
The Get Information Manager Connection Parameters screen opens.

## Providing Information Manager Connection Parameters

Provide the connection and repository details for your Information Manager installation.

**ORACLE Knowledge** Get Information Manager Connection Parameters

Introduction  
Set Keystore Location  
Confirm DB Creation  
Set Database Parameters  
Confirm Installation  
Set Configuration Values  
**Connection Parameters**  
Pre-Installation Summary  
Installing...  
Install Complete

Please enter the connection details for Information Manager.

**Information Manager Web Services URL**  
http://slc01oot.us.oracle.com:8226/imws

**Information Manager Resources URL**  
http://slc01oot.us.oracle.com:8226/resources

**Information Manager Console URL**  
'InfoManager/WebObjects/InfoManager.woa?contentid='

**Repository Reference Key**

InstallAnywhere

Cancel Previous Next

- 1 Provide the following Information Manager connection parameters:

| Parameter                                   | Description                                                                                                                   |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| <b>Information Manager Web Services URL</b> | Information Manager Web Services URL for authentication and retrieving Information Manager documents                          |
| <b>Information Manager Resources URL</b>    | Resource URL for linking to files from Information Manager documents                                                          |
| <b>Repository Reference Key</b>             | This should be the Information Manager repository containing the Information Manager documents that are used with AnswerFlow. |

- 2 Select **Next** to continue.  
The Get SampleUI Credentials screen opens.

## Providing SampleUI Credentials

Provide the credentials that the SampleUI webapp uses to retrieve Information Manager documents. The repository reference key used by the SampleUI webapp to retrieve Information Manager documents should be the same as the one entered in the previous screen since AnswerFlowEditor and SampleUI always use the same IMWS and Information Manager resource URLs.

**ORACLE Knowledge** **Get SampleUI Credentials**

- ☒ Introduction
- ☒ Set Keystore Location
- ☒ Confirm DB Creation
- ☒ Set Database Parameters
- ☒ Confirm Installation
- ☒ Set Configuration Values
- ☒ **Connection Parameters**
- ☐ Pre-Installation Summary
- ☐ Installing...
- ☐ Install Complete

Please enter the default credentials for SampleUI to use to connect to Information Manager.

**Username**

**Password**

Confirm Password

InstallAnywhere

Cancel
Previous
Next

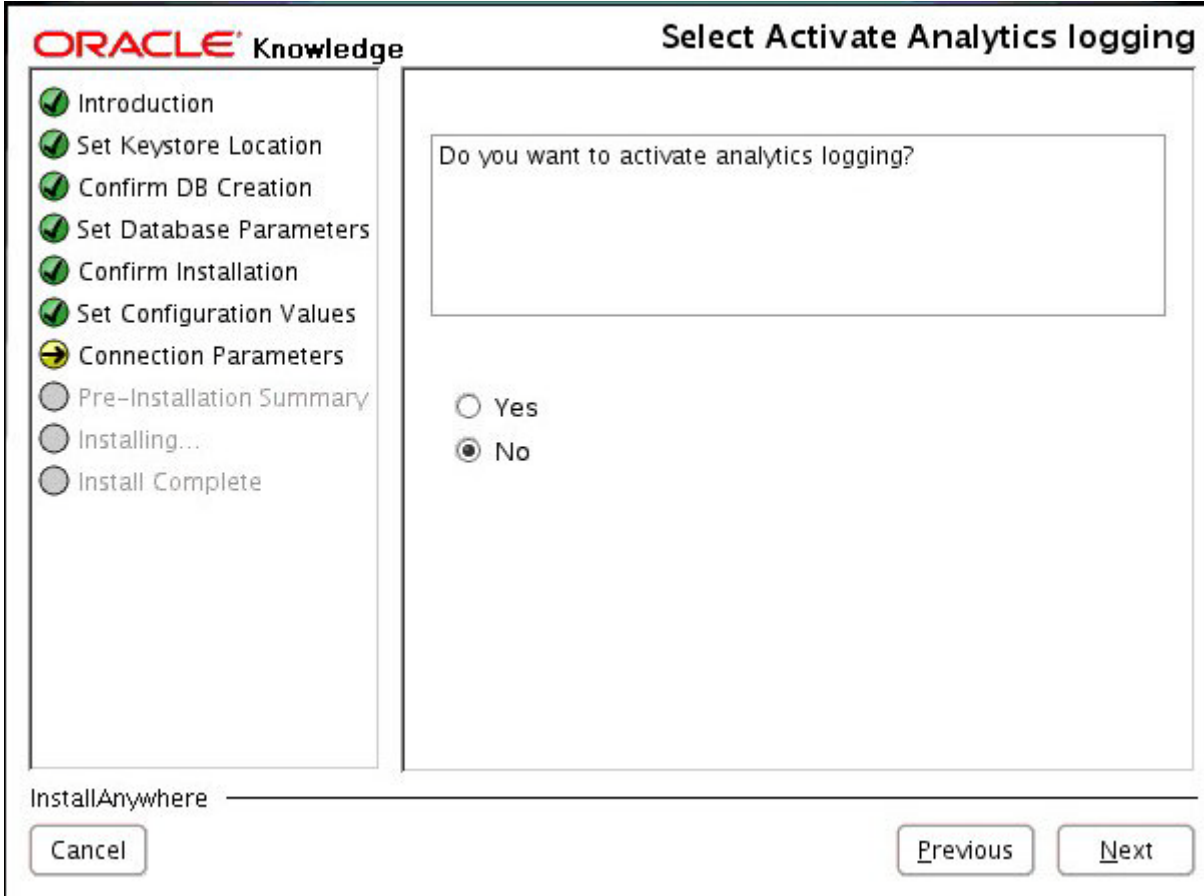
- 1 Provide the following Information Manager connection parameters:

| Parameter                       | Description                                                                                                                   |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| <b>Username</b>                 | Enter the username for the SampleUI to use to connect to the Information Manager repository.                                  |
| <b>Password</b>                 | Enter and confirm the password associated with the username above.                                                            |
| <b>Repository Reference Key</b> | This should be the Information Manager repository containing the Information Manager documents that are used with AnswerFlow. |

- 2 Select **Next** to continue.  
The Select Activate Analytics Logging screen opens.

## Activating Analytics Logging

Choose whether or not to activate Oracle Knowledge Analytics logging.



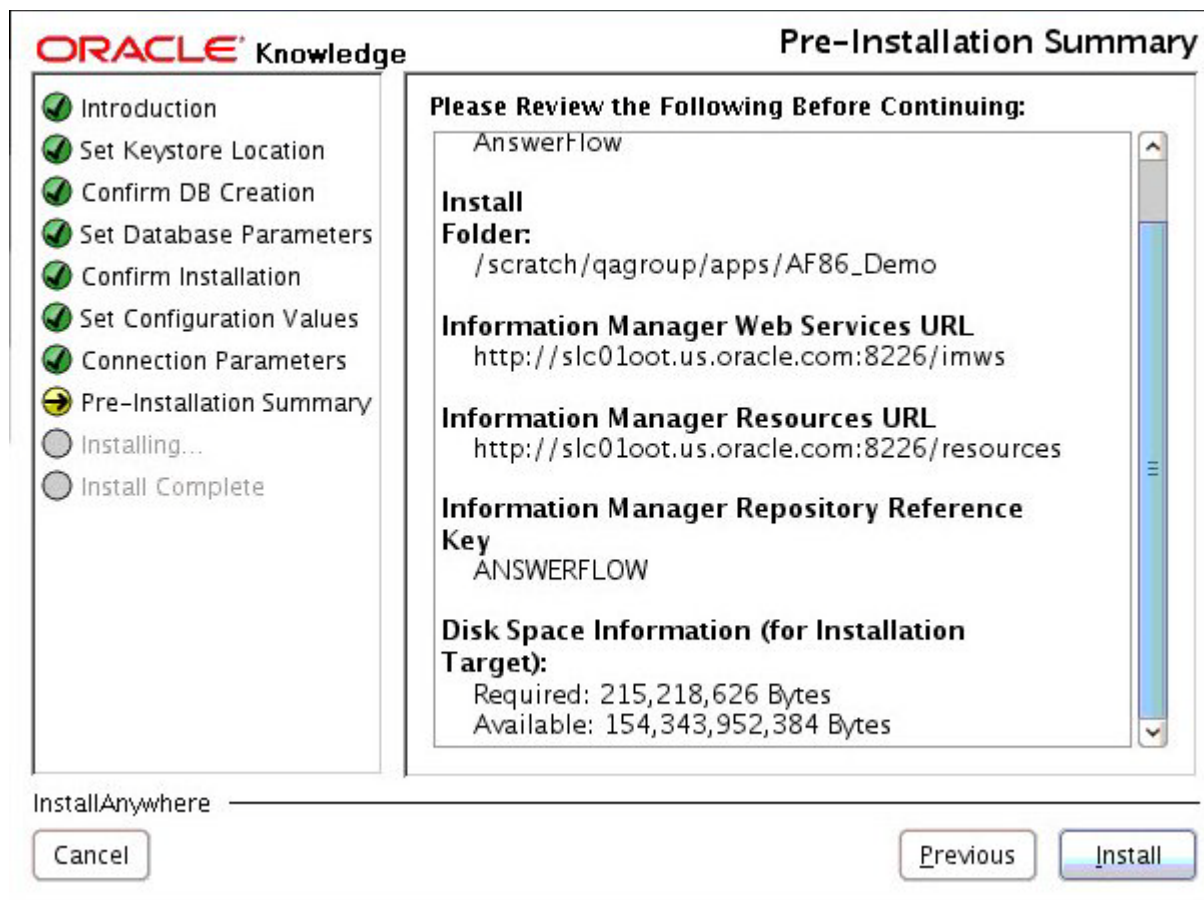
The image shows a screenshot of the 'ORACLE Knowledge' installation window, specifically the 'Select Activate Analytics logging' step. On the left, a list of installation steps is shown with progress indicators: Introduction, Set Keystore Location, Confirm DB Creation, Set Database Parameters, Confirm Installation, Set Configuration Values, Connection Parameters (highlighted with a yellow arrow), Pre-Installation Summary, Installing..., and Install Complete. The main area contains the question 'Do you want to activate analytics logging?' with two radio button options: 'Yes' and 'No'. The 'No' option is selected. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons. The 'InstallAnywhere' logo is visible in the bottom left corner.

- 1 Select Yes to log Analytics or No to not log Analytics.
- 2 Click **Next** to continue.  
The Pre-Installation Summary screen opens.



## Pre-Installation Summary

The Pre-Installation Summary screen displays a summary of your installation selections, as well as disk space information, prior to transferring the product files from the distribution.



- 1 Review your selections.
- 2 To make any corrections, select **Previous**.
- 3 Select **Install** to continue.  
AnswerFlow begins installing in the specified location.  
When the AnswerFlow installation is complete, the Installation Complete screen opens.
- 4 Make note of the access URL. The default is `http://localhost:8232/AnswerFlowEditor`
- 5 Select **Done** to exit the installation program.  
After completing the installation, you can start the application as described in "Deploying the xmemcached Archive" on page 200.

## Completing the Installation

Perform the following configuration to complete the AnswerFlow installation.

### Installing the AnswerFlow Service (Windows)

When you install and configure Oracle Knowledge and AnswerFlow, the installer places ICE items in the Windows Start menu for each defined instance if product icons were selected to be installed.

To install the AnswerFlow service on Windows:

- 1 Select the ICE item for the desired instance:

```
Start > Programs > Oracle > Knowledge > <application_name> (default) Environment
```

- a If no product icons were installed, open a command prompt and cd into  
`<Oracle_Knowledge_home>/instances/<Instance_Name>`  
 where `<Instance_Name>` refers to the AnswerFlow instance name on this installation.
- b Execute `setenv.bat` to open the ICE command prompt.

- 2 Install the AnswerFlow service by executing the following command in the ICE:

```
inquiraaftservice.bat -install or inquiraaftservice -install.
```

Optionally, to uninstall, use the command:

```
inquiraaftservice.bat -uninstall or inquiraaftservice -uninstall.
```

### Operating AnswerFlow from the Common Environment

Use the following commands to start and stop the AnswerFlow service from the Common Environment:

| Command                                                                                                                                             | Description                                                                                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• <code>inquiraaft.sh start</code> (Linux)</li> <li>• <code>inquiraaft start</code> (Windows)</li> </ul>     | Starts the Editor service when run from the Editor ICE window; starts the RuntimeUI service when run from the RuntimeUI ICE window.                         |
| <ul style="list-style-type: none"> <li>• <code>inquiraaft.sh stop</code> (Linux)</li> <li>• <code>inquiraaft stop</code> (Windows)</li> </ul>       | Stops the Editor service when run from the Editor ICE window; stops the RuntimeUI service when run from the RuntimeUI ICE window.                           |
| <ul style="list-style-type: none"> <li>• <code>inquiraaft.sh restart</code> (Linux)</li> <li>• <code>inquiraaft restart</code> (Windows)</li> </ul> | Stops and restarts the Editor service when run from the Editor ICE window; stops and restarts the RuntimeUI service when run from the RuntimeUI ICE window. |

**Note:** The commands `inquiraaft.sh/inquiraaft restart` and `inquiraaft.sh/inquiraaft stop` operate successfully only if the application was started by executing the `inquiraaft.sh start` or `inquiraaft start` commands.

You can use the Oracle WebLogic Server Administration Console to start the managed server as described in “Start Oracle Knowledge on WebLogic Server” on page 38.

You can also start AnswerFlow from the ICE environment.

To start AnswerFlow from the ICE prompt:

- 1 Open a command prompt and change to  
`<Oracle_Knowledge_home>/instances/<Instance_Name>`  
where  
`<Instance_Name>` is the AnswerFlow instance name on this installation.
- 2 On Linux, execute `setenv.sh` to open an ICE command prompt.  
On Windows, execute `setenv.bat` to open an ICE command prompt.
- 3 Execute the appropriate script from the ICE environment:  
On Linux, execute `inquiraaf.sh start`.  
On Windows, execute `inquiraaf start`.

## Restarting the AnswerFlow Service

You must restart the AnswerFlow service to apply any configuration changes to the AnswerFlow Web applications.

**Important!** You must start the ICE environment as an administrator in order to install, uninstall, stop, or start Oracle Knowledge services.

## Restarting AnswerFlow on Linux

To restart AnswerFlow service on Linux:

- 1 Open a command prompt and change to:  
`<Oracle_Knowledge_home>/instances/<Instance_Name>`  
where  
`<Instance_Name>` is the AnswerFlow instance name on this installation.
- 2 Execute `setenv.sh` to open an ICE command prompt.
- 3 Restart the AnswerFlow instance by executing the following command in the ICE command prompt:  
`inquiraaf.sh restart`

## Restarting AnswerFlow on Windows

When you install and configure Oracle Knowledge and AnswerFlow, the installer places Common Environment items in the Windows Start menu for each defined instance if product icons were selected to be installed.

To restart the AnswerFlow service on Windows:

- 1 Select the ICE item for the desired instance:  
Start > Programs > Oracle > Knowledge > <application\_name> (default) Environment  
If you did not install product icons, open a command prompt and change to:  
`<Oracle_Knowledge_home>/instances/<Instance_Name>`  
where:  
`<Instance_Name>` is the AnswerFlow instance name on this installation.

- 2 Execute `setenv.bat` to open an ICE command prompt.
- 3 Restart the AnswerFlow instance by executing the following command in the ICE command prompt:  
`inquiraaf restart`

## Deploying the xmemcached Archive

You must deploy the xmemcached jar to enable certain AnswerFlow functions.

For Tomcat, deploy the file `xmemcached-1.4.1.jar` as follows:

- 1 Download the file <https://xmemcached.googlecode.com/files/xmemcached-1.4.1.jar>
- 2 Copy the file `xmemcached-1.4.1.jar` to `<AnswerFlow installation directory>/instances/Editor/appserveraf/webapps/AnswerFlowEditor/WEB-INF/lib`
- 3 Copy `xmemcached-1.4.1.jar` to `<AnswerFlow installation directory>/Sample/SampleUI/lib`

For WebLogic, deploy the file `xmemcached-1.4.1.jar` as follows:

- 1 Download the file <https://xmemcached.googlecode.com/files/xmemcached-1.4.1.jar>
- 2 Copy the file `xmemcached-1.4.1.jar` to `<AnswerFlow installation directory>/instances/Editor/webapps/AnswerFlowEditor/WEB-INF/lib`
- 3 Copy `xmemcached-1.4.1.jar` to `<AnswerFlow installation directory>/Sample/SampleUI/lib`

## Compiling and Deploying the SampleUI Web Application

If you are planning to use the RuntimeUI, you must compile and deploy the SampleUI web application:

- 1 Start the RuntimeUI ICE if it is not running.
  - a Change directory to `<AnswerFlow installation directory>/instances/RuntimeUI/`
  - b execute `setenv.sh` for Linux/Solaris or `setenv.bat` for Windows
- 2 If you are using WebLogic and the WebLogic Admin Server for the domain in which you installed AnswerFlow is not running, start it now.
- 3 For Linux or Solaris, run `deploy.sh -s <location of SampleUI source directory> -w <location of SampleUI.war>`. For example, `deploy.sh -s ../../Sample/SampleUI -w ../../Sample/SampleUI/target/SampleUI.war`  
For Windows, run `deploy.bat -s <location of SampleUI source directory> -w <location of SampleUI.war>`. For example, `deploy.bat -s ../../Sample/SampleUI -w ../../Sample/SampleUI/target/SampleUI.war`

# Installing RightNow Integration Components

This chapter describes the installation process for Oracle Knowledge RightNow integration components.

## Oracle Knowledge RightNow Integration Overview

The Oracle Knowledge RightNow integration package provides the necessary components to integrate Oracle Knowledge content with RightNow Agent Desktop and Customer Portal. The installer places the integration components into the directory you specify. This installer *does not* install RightNow Agent Desktop and Customer Portal. You must install those separately using the installers available from Oracle.

**Note:** RightNow Agent Desktop and Customer Portal are available only on the Windows platform.

## Run the Oracle Knowledge RightNow Installer

You start the RightNow installer by following the appropriate steps for your environment.

### Starting the Installer in Windows Environments

On Windows 2008, the user must be part of the Administrators group to install and operate Oracle Knowledge products.

To start the installer in Windows environments:

- Double-click the installation file

- or –

- Run the file using the command line with the following command:

```
install_okrightnow_<operating_system>_build_<#>.exe
```

### Starting the Installer in Linux Environments

On Linux, Oracle Knowledge software must be installed using a non-root user. Before running the installer, create a standard Oracle Knowledge admin (Linux) user in the operating system. This user installs and runs the Oracle Knowledge software and must be given permission to access network shares while running as a service.

To start the installer in Linux environments:

- 1 Open a bash shell by entering bash command:

```
bash
```

- 2 Use `cd` to go to the installer temporary directory.

- 3 Set the default locale for the bash shell to `en_US` by entering the following:

```
export LC_ALL="en_US"
```

- 4 Set permissions on the binary files so that they are executable by entering:

```
chmod +x *.bin
```

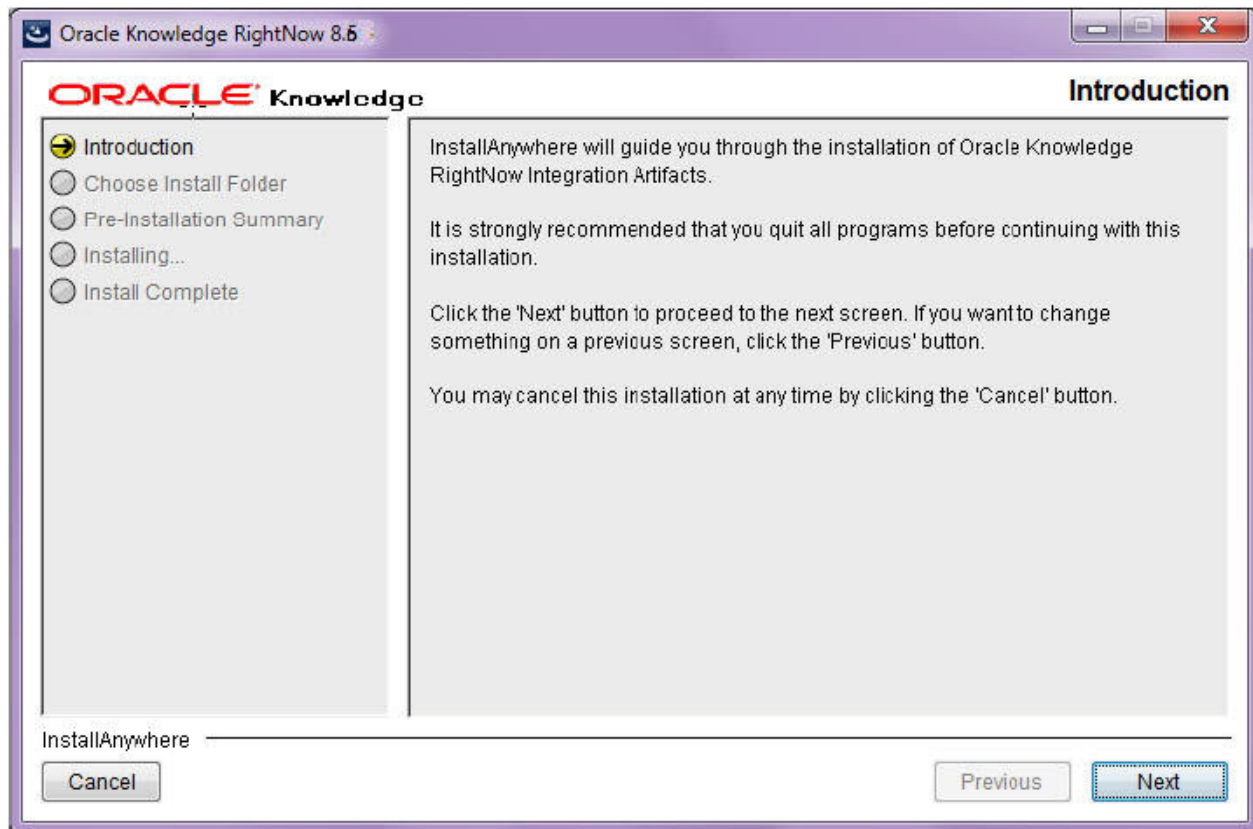
- 5 Start the installer:

```
./install_okrightnow_<operating_system>_build_<#>.bin
```

When the initialization progress dialog completes, the installer displays the introduction screen. The Installation Introduction screen recommends that all other programs running be stopped and provides information on operating the installer.

## Oracle Knowledge RightNow Installation Introduction

The installer's introduction screen provides general information about the installation process and recommends that you close any other programs that are currently running.



Select **Next** to continue.

The installer displays the **Configure RightNow Location** screen.

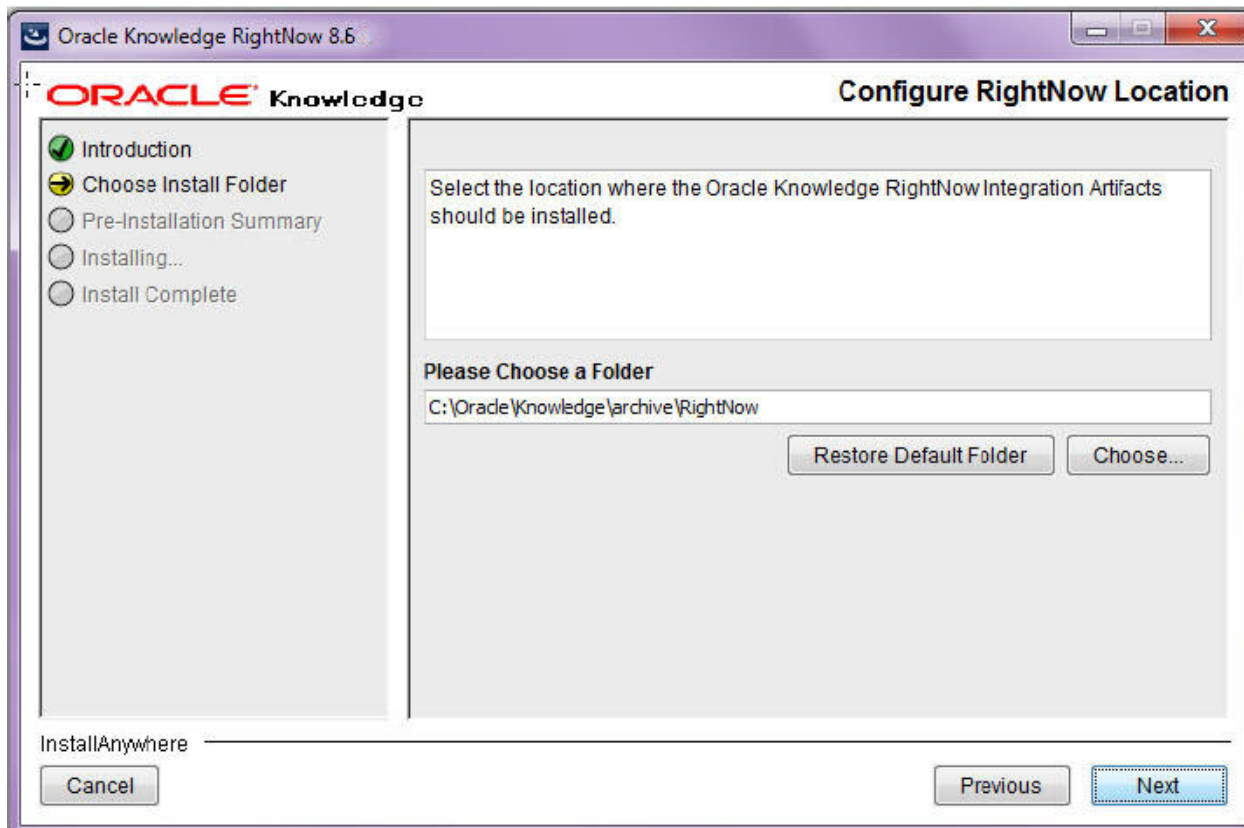
## Configure RightNow Location

Select the directory location where you want the Oracle Knowledge Right Now Integration Artifacts to be installed.

The installer displays the default, recommended installation directory:

- home/<user\_name>/Oracle/Knowledge/archive/RightNow on Linux
- C:\Oracle\Knowledge\archive\RightNow on Windows

You can install at any location. The recommended location is within the base Oracle Knowledge application directory (for example: home/<user\_name>/Oracle/Knowledge or C:\Oracle\Knowledge).



Select **Choose** to open a file browser and select an alternate Oracle Knowledge base directory.

Use the **Restore Default Folder** option to reset the default installation directory, if necessary.

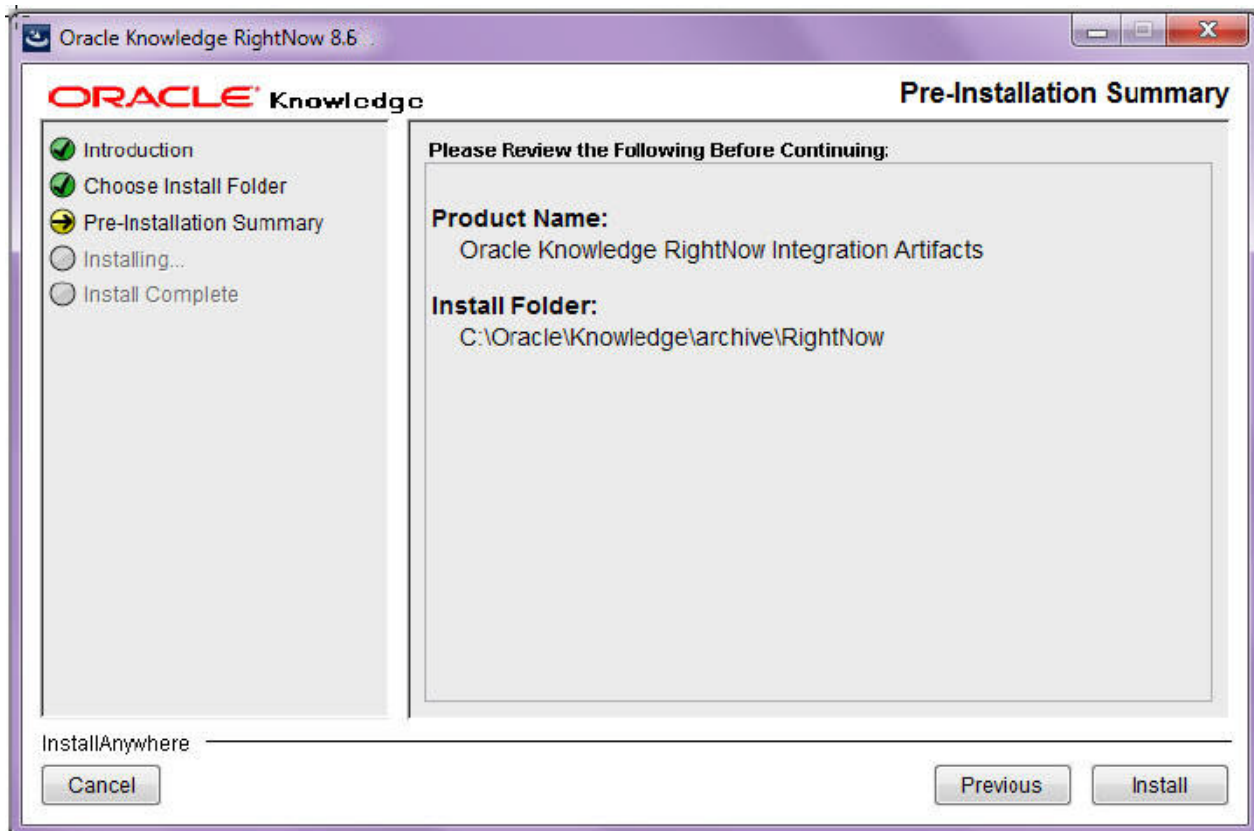
Select **Next** to continue.

The installer displays the **Pre-Installation Summary** screen.



## Pre-Installation Summary

The Pre-Installation Summary screen displays a summary of your installation selections prior to transferring the product files from the distribution.



Review your selection.

Select **Previous** to make any corrections.

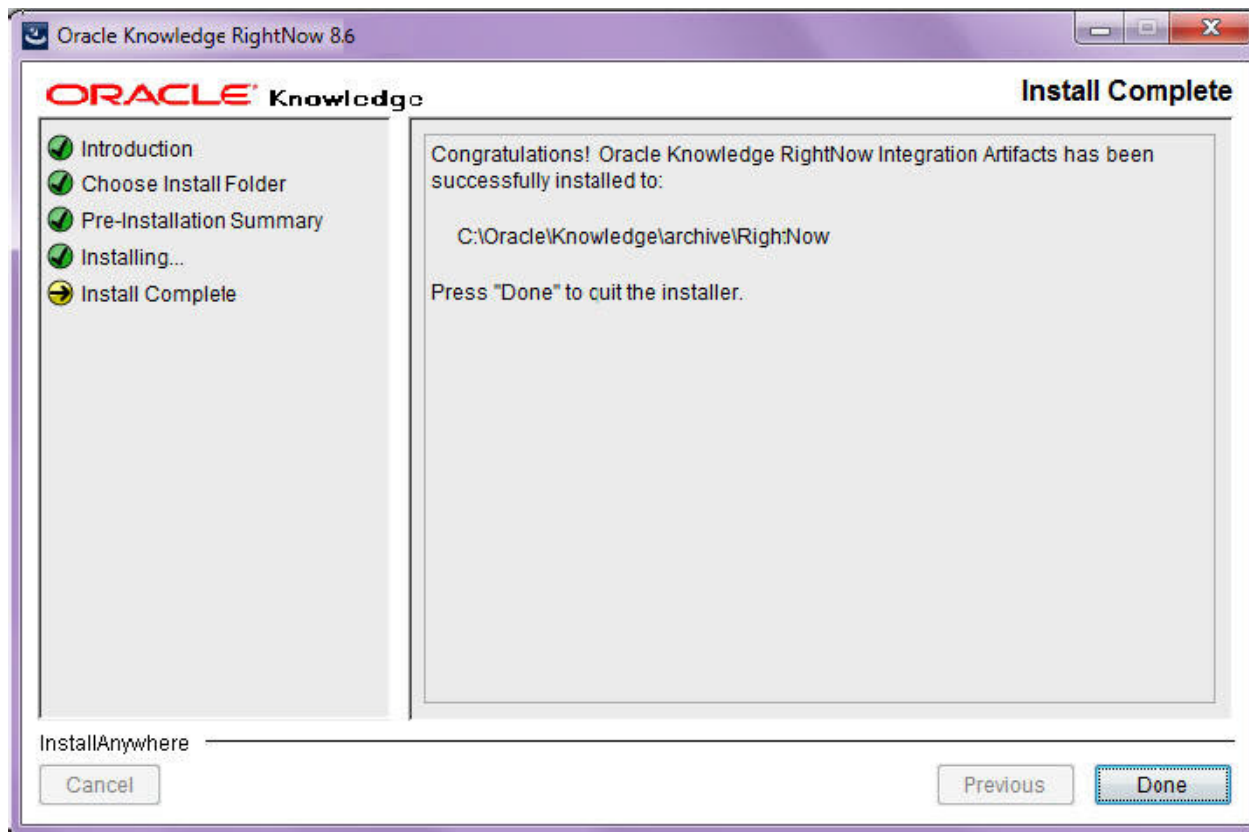
Select **Install** to continue.

The installer begins installing the Oracle Knowledge RightNow Integration Artifacts in the specified location.

When the Oracle Knowledge RightNow installation completes, the installer presents the **Installation Complete** screen.

## Installation Complete

Make note of the installation directory.



Select **Done** to exit the installation program.

After completing the installation, you can find the artifacts in the specified location.

## Post-Installation Instructions

Use the instructions in the *Oracle Knowledge for RightNow Integration Guide* to configure the installed components and complete the integration.

# Troubleshooting Oracle Knowledge Installations

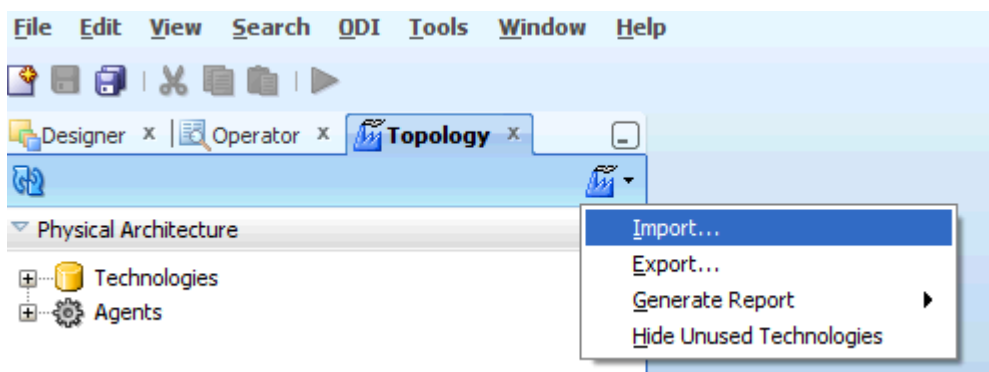
This appendix describes troubleshooting procedures for Oracle Knowledge installations in the following sections:

- **Import the Analytics ODI Components Manually**
- **Uninstall Oracle Knowledge**

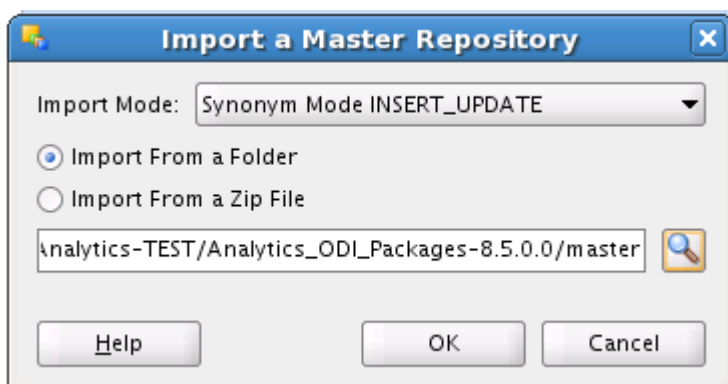
## Import the Analytics ODI Components Manually

To manually import the Analytics ODI components:

- 1 Open ODI Studio and connect to the desired work repository.
- 2 For all of the following imports, use these parameters:
  - Import Mode: **Synonym Mode INSERT\_UPDATE**.
  - Select **Import From a Folder**.
  - Select the directory of the ODI component (master, logical, or work).



- 3 In the Topology tab, select **Import**, then select **Import the Master Repository**.



- 4 Select the **master** directory, and use the parameters identified in step 2.
- 5 Select **OK**.
- 6 In the Topology tab, select **Import**, then select **Import the Logical Topology**.
- 7 Select the **logical** directory, and use the parameters identified in step 2.
- 8 Select **OK**.
- 9 In the Designer tab, select **Import**, then select **Import the Work Repository**.
- 10 Select the **work** directory, and use the parameters identified in step 2.
- 11 Select **OK**.

## Uninstall Oracle Knowledge

Oracle Knowledge provides uninstall programs for each component.

The uninstall application is not supported on the following platforms:

- Oracle Linux operating on Oracle Exalogic processors
- Microsoft Windows Server 2012 R2 Enterprise

For instructions on removing Oracle Knowledge components from these platforms, see “Uninstall on Oracle Linux Operating on Oracle Exalogic Processors” on page 212 or “Uninstall on Microsoft Windows Server 2012 R2 Enterprise” on page 212.

This section describes the following procedures:

- **Uninstall Intelligent Search**
- **Uninstall Information Manager**
- **Uninstall AnswerFlow**
- **Uninstall on Oracle Linux Operating on Oracle Exalogic Processors**
- **Uninstall on Microsoft Windows Server 2012 R2 Enterprise**
- **Remove Oracle Knowledge WebLogic Components**

**Important!** You must stop all Oracle Knowledge services before you begin any of the uninstallation procedures.

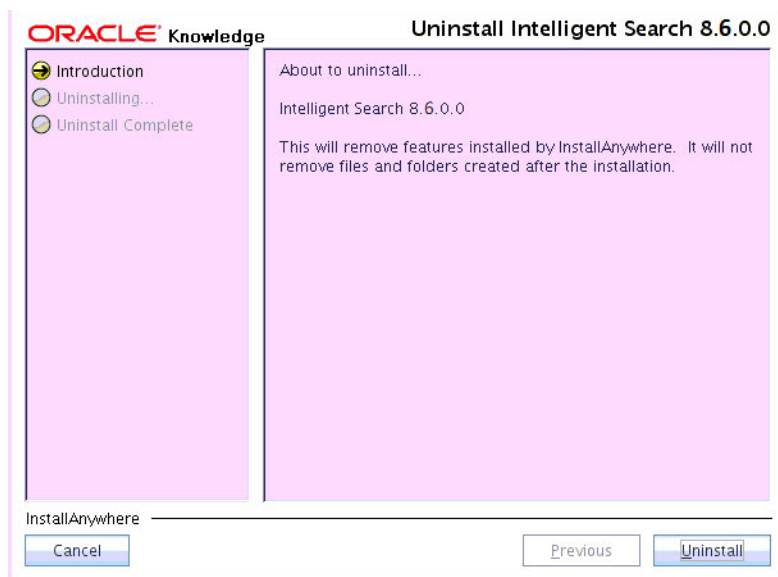
**Note:** The Uninstaller screens are displayed only in the Uninstall Intelligent Search section below. The Uninstaller screens are similar for all other components; the individual procedures describe any significant differences.

## Uninstall Intelligent Search

To uninstall Intelligent Search:

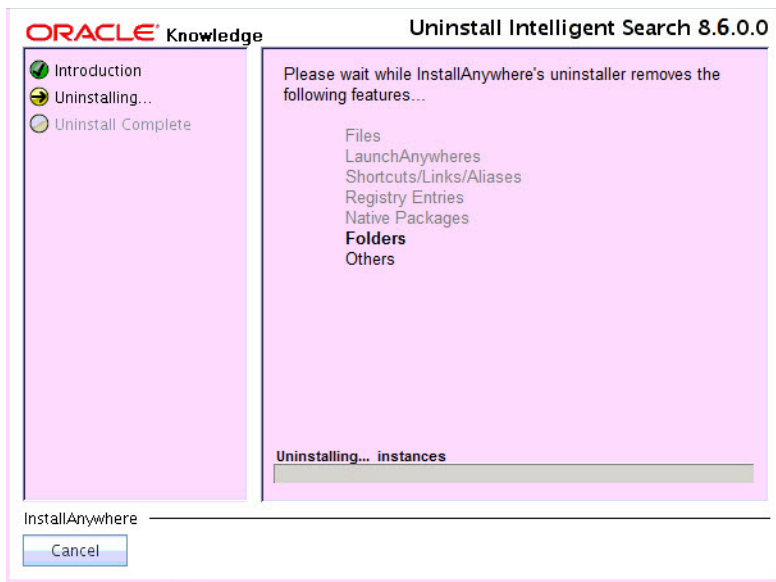
- 1 Locate the UninstallerData folder.  
This folder is located at <Oracle\_Knowledge\_home>/UninstallerData.
- 2 Execute Uninstall\_Inqira on Linux.  
- or -  
Execute Uninstall\_Inqira.exe on Windows.

The Uninstall Oracle Knowledge screen displays.

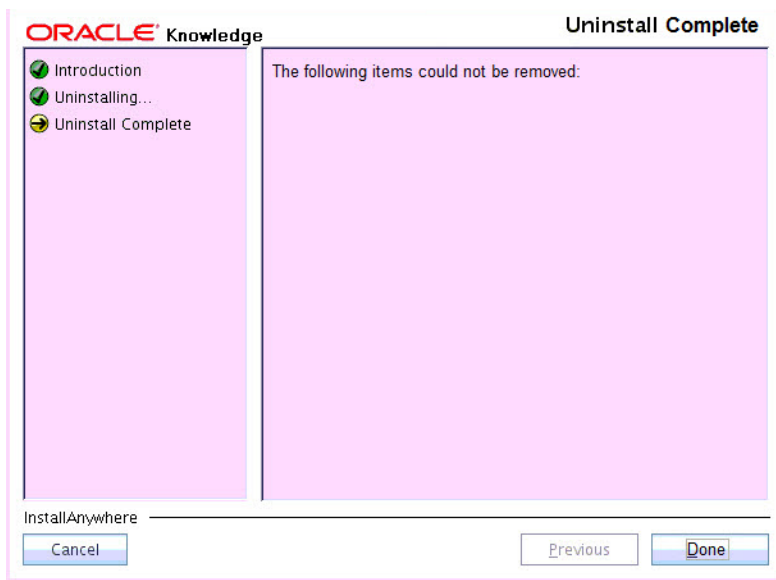


- 3 Select **Uninstall**.

The uninstall process begins:



The Uninstall Complete screen displays.



Files that were added after the installation are not removed as a part of the uninstallation process. These items appear in the **The following items could not be removed** field, and they must be removed manually. Review these files before deleting. Depending upon your operating system, some items may not appear on the screen.

- 4 On Windows, select either **Yes, restart my system** or **No, I will restart my system myself**.
- 5 Select **Done**.

## Uninstall Information Manager

To uninstall Information Manager:

- 1 Locate the UninstallerData folder.  
This folder is located at `<Oracle_Knowledge_home>/Uninstall_Information_Manager`
- 2 Execute `Uninstall_Information_Manager` on Linux.  
- or -  
Execute `Uninstall_Information_Manager.exe` on Windows.  
The Uninstall Oracle Knowledge screen displays.
- 3 Select **Uninstall**.  
The uninstall process begins.  
The uninstall process removes the Oracle Knowledge files.  
The uninstall Complete screen displays.
- 4 Select **Done**.

## Uninstall AnswerFlow

To uninstall Information Manager:

- 1 Locate the UninstallerData folder.  
This folder is located at `<Oracle_Knowledge_home>/Uninstall_AnswerFlow`
- 2 Execute `Uninstall_AnswerFlow` on Linux.  
- or -  
Execute `Uninstall_AnswerFlow.exe` on Windows.  
The AnswerFlow uninstallation program starts and the Introduction screen displays.
- 3 Select **Next** to continue.  
The Choose Components to Uninstall screen appears.
- 4 Select the data you do not wish to delete during uninstallation. Your data is preserved by backing up files and folders according to the following table (the files and folders are moved from Source Path to Destination Path):

| Option                  | Source Path                                                            | Destination Path                                               |
|-------------------------|------------------------------------------------------------------------|----------------------------------------------------------------|
| <b>Process Data</b>     | <code>&lt;Install_Directory&gt;\data\Editor\SVN\Repositories\PM</code> | <code>&lt;Install_Directory&gt;\savedData\SVNRepository</code> |
|                         | <code>&lt;Install_Directory&gt;\data\Editor\VERSION</code>             | <code>&lt;Install_Directory&gt;\savedData\VERSION</code>       |
| <b>SampleUI Project</b> | <code>&lt;Install_Directory&gt;\Sample\SampleUI</code>                 | <code>&lt;Install_Directory&gt;\SampleUI</code>                |

- 5 Select **Next** to continue.  
The selected data is moved and the application components are removed.  
The Uninstall Complete screen displays.
- 6 Select **Done**.

## Uninstall on Oracle Linux Operating on Oracle Exalogic Processors

After you have manually stopped all running Oracle Knowledge services, remove the installation by running the Linux command on all installed Oracle Knowledge instances:

```
rm -rf <InstallDir>
```

## Uninstall on Microsoft Windows Server 2012 R2 Enterprise

After you have manually stopped all running Oracle Knowledge services, you can then delete the services.

You must then manually delete the installation directories for all installed Oracle Knowledge instances.

## Remove Oracle Knowledge WebLogic Components

There are three types of WebLogic components that can be uninstalled: Managed Servers, Machines, and Deployments. This section discusses how to remove them.

### Begin the Removal Process

Before removing these components, please ensure that the Oracle WebLogic Administration Server is running and that you are logged into the Administration Console. Once the server is running and you are logged in, click the "Lock & Edit" button. This enables you to make changes to the administration server.

### Remove Oracle Knowledge Components from WebLogic

Use the following procedures to remove managed servers, machines, and deployments from WebLogic.

#### MANAGED SERVERS

- 1 Navigate to Environment > Servers.
- 2 Select the checkboxes for the following:
  - **IntelligentSearchServer\***
  - **InformationManagerServer\***
  - **AnalyticsServer\***
  - **AnswerFlowEditorServer\***
  - **AnswerFlowRuntimeUIServer \***

\*or the names specified during the setting of the managed server values for each product.
- 3 Select **Delete**.
- 4 When the confirmation screen appears, click **Yes**.

#### MACHINES

- 1 Navigate to Environment > Machines.
- 2 Select the checkboxes for any machines you created while installing Oracle Knowledge products and now wish to delete.
- 3 Select **Delete**.



- 4 When the confirmation screen appears, click **Yes**.

## DEPLOYMENTS

- 1 Navigate to Deployments.
- 2 Select the checkboxes for the following:
  - **Intelligent Search Applications\***
  - **Information Manager Applications\***
  - **Analytics Applications\***
  - **AnswerFlowEditor\***
  - **SampleUI\***

\*or the appropriate name for your applications, if you have any deployed.
- 3 Select **Delete**.
- 4 When the confirmation screen appears, click **Yes**.

## Complete the Removal Process

When the managed servers, machines, and deployments have been removed, click the **Activate Changes** button.