

Oracle® Endeca Information Discovery Studio

Studio Migration Guide

Version 3.2.0 • January 2016

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Table of Contents

| | |
|---|-----------|
| Copyright and disclaimer | 2 |
| Preface | 4 |
| About this guide | 4 |
| Who should use this guide | 4 |
| Conventions used in this document | 4 |
| Contacting Oracle Customer Support | 5 |
| Chapter 1: Upgrading to Oracle Endeca Information Discovery Studio Version 3.2.0 | 6 |
| Required reading | 6 |
| High-level upgrade procedure | 6 |
| Upgrading Studio | 7 |
| Backing up your Studio 3.1.x files | 7 |
| Installing Studio 3.2.0 and restoring backups | 8 |
| Upgrading the Provisioning Service | 9 |
| Chapter 2: Required Changes | 10 |
| Platform support | 10 |

Preface

Endeca Information Discovery Studio is an industry-leading application composition environment and discovery experience that allows business users to easily upload and mash up multiple diverse data sources, and then quickly configure discovery applications - all within the context of an enterprise framework that maintains existing governance and enterprise definitions.

Studio includes world-class search, guided navigation, and filtering, as well as offering an array of powerful interactive visualizations, for rapid intuitive analysis that requires zero training.

About this guide

This guide helps you upgrade your Oracle Endeca Information Discovery Studio implementation by describing the major changes between version 3.1.x and 3.2.0.

Note that this guide only covers changes to Studio.

- For information on migrating Oracle Endeca Server, see the *Oracle Endeca Server Migration Guide* for version 7.7.0.
- For information on migrating Oracle Endeca Information Discovery Integrator ETL, see the *Integrator ETL Migration Guide*.

Who should use this guide

This guide is intended for system administrators and developers who are upgrading Oracle Endeca Information Discovery Studio on Windows or Linux.

This guide is intended for users whose Studio applications are built using standard Studio components. It does not necessarily apply to Studio applications built with custom components.

Conventions used in this document

The following conventions are used in this document.

Typographic conventions

The following table describes the typographic conventions used in this document.

| Typeface | Meaning |
|--------------------------------|---|
| User Interface Elements | This formatting is used for graphical user interface elements such as pages, dialog boxes, buttons, and fields. |
| Code Sample | This formatting is used for sample code phrases within a paragraph. |
| <i>Variable</i> | This formatting is used for variable values. For variables within a code sample, the formatting is <i>Variable</i> . |

| Typeface | Meaning |
|-----------|---|
| File Path | This formatting is used for file names and paths. |

Symbol conventions

The following table describes symbol conventions used in this document.

| Symbol | Description | Example | Meaning |
|--------|--|----------------------|--|
| > | The right angle bracket, or greater-than sign, indicates menu item selections in a graphic user interface. | File > New > Project | From the File menu, choose New, then from the New submenu, choose Project. |

Contacting Oracle Customer Support

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

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



Chapter 1

Upgrading to Oracle Endeca Information Discovery Studio Version 3.2.0

This section provides instructions for upgrading to Oracle Endeca Information Discovery Studio 3.2.0. Before you start the upgrade process, check the remaining sections of this guide to learn about the changes that will affect you during or after the upgrade.

[Required reading](#)

[High-level upgrade procedure](#)

[Upgrading Studio](#)

[Upgrading the Provisioning Service](#)

Required reading

In addition to reading this document, it is recommended that you read the following documents for important information about the release.

Release Announcement

The Release Announcement outlines the new features that were added in Version 3.2.0.

Release Notes

The Release Notes for Studio and the Provisioning Service provide information about known issues and bug fixes for this release.

Installation Guide

The *Studio Installation Guide* provides an overview of Studio and the Provisioning Service, and includes information about configuration scenarios. It contains installation instructions for Studio and the Provisioning Service, and information on how to verify your installation.

High-level upgrade procedure

This topic provides the recommended order for upgrading to version 3.2.0 of Studio.

The upgrade process in this guide includes upgrade procedures for Studio. Upgrade procedures for Oracle Endeca Server can be found in the *Oracle Endeca Server Migration Guide*. Upgrade procedures for Oracle Endeca Information Discovery Integrator ETL can be found in the *Integrator ETL Migration Guide*.

The following procedure provides high-level steps for the entire upgrade process. See the individual topics in this section for detailed instructions in each step.

To upgrade from version 3.1.x to version 3.2.0 of Studio:

1. Upgrade to version 12.1.3 of WebLogic Server and 7.7.0 of Oracle Endeca Server.

For information on upgrading WebLogic Server and Oracle Endeca Server, see the *Oracle Endeca Server Migration Guide* for version 7.7.0.

As a result of this step, you should have Oracle Endeca Server installed and started.

2. Upgrade to version 3.2.0 of Oracle Endeca Information Discovery Integrator ETL.

For upgrade information, see the *Integrator ETL Migration Guide* for version 3.2.0.

As a result of this step, you should have Integrator ETL installed. You should also have made any required updates to your existing graphs.

3. Upgrade Studio. See [Upgrading Studio on page 7](#).

4. Upgrade the Provisioning Service. See [Upgrading the Provisioning Service on page 9](#).

After you complete the upgrade, for Endeca Server domains that were created by uploading an Excel spreadsheet, you will need to use the file to create a new version of the application.

You can delete the original application.

Upgrading Studio

This section describes how to upgrade to Studio 3.2.0.

[Backing up your Studio 3.1.x files](#)

[Installing Studio 3.2.0 and restoring backups](#)

Backing up your Studio 3.1.x files

The first step in migrating to Studio 3.2.x is to back up files from Studio 3.1.x.

To back up your Studio 3.1.x files:

1. Stop your Studio server.
2. Back up your database.

If you are using HSQL, then you can skip this step. Your database will be backed up when you back up the `data` directory.

If you are using MYSQL or some other RDBMS, follow the backup procedures from your vendor.

3. If you have customized settings in `portal-ext.properties`, then you should save a copy of the file.

The `portal-ext.properties` file has changed significantly. Some required settings have been moved out of the file into the Studio application, and some customization settings have been renamed or removed.

Because of this, after you upgrade, instead of replacing the new 3.2 file with your 3.1 file, you simply copy the relevant customized settings from your 3.1 file into the 3.2 file.

Customized settings in `portal-ext.properties` that you can copy over to the 3.2 file include:

- Database connection information for the Studio database
 - Framework settings that have been configured in the file, so that they are not editable on the **Framework Settings** page of the **Control Panel**. Framework setting names start with "df".
 - Reverse proxy configuration
 - Synchronized caching for Studio clusters
4. Back up the entire `data` directory to a safe backup location.
For WebLogic, the `data` directory is in the Liferay Home directory.
If you have changed the location of anything normally kept in `data`, such as your JCR repository or Lucene search indexes, back up your custom location(s) as well.
 5. After backing up the files, rename the `endeca-portal` or Studio Home directory.
This ensures that the Studio 3.2.0 installation will not overwrite any of the existing files.
You can remove this directory after you complete the Studio 3.2.0 installation.

Installing Studio 3.2.0 and restoring backups

You next install Studio 3.2.0. After installing, you use your backed-up files to restore your data and custom settings. You then start Studio 3.2.0.

To complete the upgrade to Studio 3.2.0:

1. Install Studio 3.2.0, following the steps in the *Studio Installation Guide*. Do not start the server.
The default context path for Studio has changed from the root context to `/eid/`. If you need to change the context path, follow the instructions in the 3.2.0 guide.
In WebLogic, the default Studio home (previously Liferay Home) directory has changed from `<MiddlewareHomeDirectory>/user_projects/domains` to `<MiddlewareHomeDirectory>/user_projects/domains/<StudioDomain>/eid/studio`. If you need to change the value for Studio home, follow the instructions in the 3.2 guide.
2. Restore the entire `data` directory from your safe backup location. This overwrites the `data` files that were installed with Studio 3.2.0.
If you have changed the location of anything normally kept in `data`, such as your JCR repository or Lucene search indexes, restore and re-verify your custom locations as well.
3. Restore your database.
If you are using HSQL, you can skip this step. Your database was restored when you restored the `data` directory.
If you are using MySQL or some other RDBMS, your database should still be intact. If it is not, follow the restore procedures from your vendor.
4. If you are not using HSQL, configure Studio to connect to your database.
The 3.2 `portal-ext.properties` file includes some sample commented out settings.

You can copy your customized settings from the 3.1 `portal-ext.properties` file.

5. Copy any other customized settings from the 3.1 `portal-ext.properties` file into the 3.2 `portal-ext.properties` file.
6. Start Studio 3.2.0.

Before you start to use Studio, make sure that you wait until all of the components have been deployed and registered. To verify that the upgrade is truly complete, you can monitor the log files to see when all activity has stopped.

Upgrading the Provisioning Service

After you upgrade Studio, you then upgrade the Provisioning Service.

To upgrade the Provisioning Service:

1. Record the Provisioning Service configurations in `plan.xml`.
2. Delete the Provisioning Service 3.1.x domain. To delete the domain:
 - (a) Stop the domain.
 - (b) In the file `$MS_HOME/domain-registry.xml`, delete the domain entry for the Provisioning Service domain.
 - (c) In the file `$MS_HOME/common/nodemanager/nodemanager.domains`, delete the domain entry for the Provisioning Service domain.
 - (d) Delete the Provisioning Service application directory from the `user_projects/applications` directory.
 - (e) Delete the Provisioning Service domain directory from the `user_projects/domains` directory.
3. Install the Provisioning Service version 3.2.0. For details, see "Installing the Provisioning Service" in the *Oracle Endeca Information Discovery Studio Installation Guide*.
4. Re-apply your Provisioning Service configurations.

When upgrading a Windows environment, if you had created a Windows service for the Provisioning Service domain, you must delete the existing service and create a new one.



Chapter 2

Required Changes

Required changes, if they apply to your instance of Studio or the Provisioning Service, require action on your part.

Platform support

Platform support

This release of Studio adds support for newer versions of Windows, Java, and the WebLogic Server and removes support for older versions.

Specifically, this release adds support for the following:

- Windows Server 2012 R2
- Java 7 and 8
- Oracle WebLogic Server 12c (12.1.3)
- Internet Explorer 11
- MySQL 5.5.3+

This release also removes support for the following:

- Oracle Enterprise Linux 5 for x64
- Red Hat Enterprise Linux Server 5 for x64
- Red Hat Enterprise Linux Advanced Platform 5 for x64
- Windows Server 2008 R2 Enterprise
- Oracle WebLogic Server 11gR1 (10.3.6)
- Tomcat
- Application Developer Framework Runtime
- Internet Explorer 8 and 9
- MySQL 5.1

Additionally, Hypersonic is no longer the default database and isn't supported for production environments.