# Oracle Endeca Platform Services

## Migration Guide

## Version 11.0 • January 2014

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COMMERCE

# Contents

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# Preface

Oracle Endeca Commerce is the most effective way for your customers to dynamically explore your storefront and find relevant and desired items quickly. An industry-leading faceted search and Guided Navigation solution, Oracle Endeca Commerce enables businesses to help guide and influence customers in each step of their search experience. At the core of Oracle Endeca Commerce is the MDEX Engine™, a hybrid search-analytical database specifically designed for high-performance exploration and discovery. The Endeca Content Acquisition System provides a set of extensible mechanisms to bring both structured data and unstructured content into the MDEX Engine from a variety of source systems. Endeca Assembler dynamically assembles content from any resource and seamlessly combines it into results that can be rendered for display.

Oracle Endeca Experience Manager is a single, flexible solution that enables you to create, deliver, and manage content-rich, cross-channel customer experiences. It also enables non-technical business users to deliver targeted, user-centric online experiences in a scalable way — creating always-relevant customer interactions that increase conversion rates and accelerate cross-channel sales. Non-technical users can determine the conditions for displaying content in response to any search, category selection, or facet refinement.

## About this guide

This guide describes the major tasks necessary to upgrade to Platform Services 11.0 from Platform Services 6.x.

## Who should use this guide

This guide is intended for developers who are upgrading Oracle Endeca Guided Search, as well as for system administrators managing Oracle Endeca Guided Search on Windows, UNIX, Solaris, or Linux.

**Note:** Unless otherwise indicated, whenever this document specifies UNIX, it applies to Linux and Solaris as well.

## Conventions used in this guide

This guide uses the following typographical conventions:

Code examples, inline references to code elements, file names, and user input are set in `monospace` font. In the case of long lines of code, or when inline monospace text occurs at the end of a line, the following symbol is used to show that the content continues on to the next line: ¬

When copying and pasting such examples, ensure that any occurrences of the symbol and the corresponding line break are deleted and any remaining space is closed up.

# Contacting Oracle Support

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

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

Chapter 1

# Upgrading Endeca Platform Services to Version 11.0

This section describes the steps you need to take to upgrade to Platform Services version 11.0. It is critical that, after you follow the upgrade procedures in this section, you also review this guide for additional changes required to upgrade your specific Endeca implementation.

## About Oracle Endeca Commerce components

Oracle Endeca Commerce consists of four primary components:

- Oracle Endeca MDEX Engine
- Oracle Endeca Platform Services
- Oracle Endeca Tools and Frameworks
- Oracle Endeca Content Acquisition System

Each component is upgraded individually. For more information on these packages, see the *Oracle Endeca Commerce Getting Started Guide* available on the Oracle Technology Network.

## About the documentation

Documentation for all Endeca components is available on the Oracle Technology Network (OTN) for viewing or download.

For a complete list of available documentation associated with each Endeca product, refer to the *Oracle Endeca Commerce Getting Started Guide* available on the Oracle Technology Network (OTN).

## Recommended reading

In addition to reading this document, Oracle recommends that you read the following documents for important information about the release.

**Release Announcement**

The *Release Announcement* provides a brief explanation of the new features that were added in Version 6.1.x. The *Release Announcement* is available for download from the Oracle Technology Network.

### Release Notes

The release notes for each package provide information about new features, changed features, and bug fixes for this release. You can download the release notes (`README.txt`) from the Oracle Technology Network. After installation, release notes are also available in the following location:

- Windows: `C:\Endeca\PlatformServices\<version>\README.txt`
- UNIX: `usr/local/endeca/PlatformServices/<version>/README.txt`

On Windows, you can also access the release notes from **Start > Programs > Endeca > Platform Services > Release Notes**.

### Getting Started Guide

The *Oracle Endeca Commerce Getting Started Guide* gives an overview of Endeca components and includes information about configuration scenarios. After installing all the components in your Endeca deployment, read this guide for information on verifying your installation.

# Package compatibilities

To determine the compatibility of Platform Services with other Endeca installation packages, see the *Supported Environments and Compatibility* document, available on the Oracle Technology Network.

# Upgrading from Platform Services 6.x

This procedure provides high-level steps needed to upgrade from Platform Services 6.x to Platform Services 11.0.

The high-level procedure of upgrading a Platform Services 6.x platform is:

1. Back up your EAC store.
2. Uninstall Platform Services 6.x.
3. Install Platform Services 11.0.
4. Restore the backed-up EAC store.
5. Upgrade other Endeca components as required.

Before installing upgraded versions of Endeca components, check the appropriate Installation Guide for the version that you are uninstalling for a list of environment variables used by all Endeca components, and ensure that any environment variables from previous installations are removed from your servers. This is because, on UNIX, when you uninstall the previous versions, the environment variables from the previous installations are not removed automatically.

### Step 1: Back up your existing configuration

The EAC store contains application configuration.

**Note:** This step is only necessary if you are using EAC scripts to provision your application. Implementations relying on the Deployment Template do not need to back up the EAC store because the information is stored in the Deployment Template's `AppConfig.xml` file.

To back up the EAC store:

1. Stop the Endeca HTTP service if it is running.
2. Copy the `eacstore` directory from `%ENDECA_CONF%\state` (on Windows) or `$ENDECA_CONF/state/` (on UNIX) to another location.

#### Step 2: Uninstall Platform Services 6.x

Uninstall the software as documented in the 6.x version of the *Oracle Endeca Platform Services Installation Guide*.

**Note:** If you have the Endeca Document Conversion module, uninstall it before uninstalling Platform Services.

#### Step 3: Install Platform Services 11.0

Install Platform Services 11.0 as documented in the 11.0 version of the *Oracle Endeca Platform Services Installation Guide*.

If you have purchased the Endeca Document Conversion module, install version 11.0.

#### Step 4: Restore the backed-up EAC store

To restore a backup of the EAC store on the Platform Services 11.0 location:

1. Stop the Endeca HTTP service if it is running.
2. If there is an `eacstore` directory in `%ENDECA_CONF%\state` (on Windows) or `$ENDECA_CONF/state/` (on UNIX), delete the directory.
3. Copy the backup `eacstore` directory into `%ENDECA_CONF%\state` (on Windows) or `$ENDECA_CONF/state/` (on UNIX).
4. Start the Endeca HTTP service.

Keep in mind that this step is necessary only if you used EAC scripts to provision your application in 6.x. Implementations relying on the Deployment Template do not need to back up or restore the EAC store.

#### Step 5: Upgrade other Endeca components

After you have upgraded to Platform Services 11.0, check your other Endeca components and upgrade them as necessary:

1. Upgrade the Endeca MDEX Engine to the latest version (which is 6.5 as of the publishing date of this guide). For details, see the *Oracle Endeca MDEX Engine Migration Guide* and the *Oracle Endeca MDEX Engine Installation Guide*.
2. Upgrade Endeca Tools and Frameworks to version 11.0. For details, see the *Oracle Endeca Workbench Migration Guide* and *Oracle Endeca Workbench Installation Guide*.
3. Upgrade Endeca Developer Studio to version 11.0. For details, see the section "Upgrading a Developer Studio project" in this chapter.
4. Upgrade Deployment Template to version 11.0. For details, see the *Oracle Endeca Deployment Template Usage Guide*.
5. Upgrade any other Endeca packages to maintain compatibility among the components.

## Upgrading a Developer Studio project

This section provides instructions for the basic tasks involved in upgrading a Developer Studio project from 6.x to 11.0.

Because Endeca projects are highly configurable, some implementations may require further migration changes. Please review this guide for additional changes required to upgrade your specific Endeca implementation.

## Provisioning your system

To provision your application, Oracle recommends using the Deployment Template. You can also provision your system using EAC scripts.

To provision your system:

Run the provisioning script from your existing application. (This step assumes that you already have an EAC script that you used in version 6.x for your application's provisioning).

For Deployment Template information, see the *Oracle Endeca Deployment Template Usage Guide*. For information about the Endeca Application Controller, see the *Oracle Endeca Application Controller Guide*. For detailed information about provisioning hosts, components, and scripts in Endeca Workbench, see the *Oracle Endeca Workbench Help*.

## Converting your Developer Studio project

If you have installed version 11.0 of Developer Studio, you can upgrade your 6.x project.

Before converting your project to Developer Studio version 11.0, ensure that you have already provisioned your application.

To convert your Developer Studio project to version 11.0:

1. If you have not already done so, upgrade your Endeca Tools and Frameworks installation to version 11.0. For details, see the *Oracle Endeca Tools and Frameworks Migration Guide* and *Oracle Endeca Tools and Frameworks Installation Guide*.
2. Start Developer Studio version 11.0.
3. Open the project you want to convert. Developer Studio issues a message stating that the project will be converted to the new format. Click **OK**, and specify the location to which you want to save your updated project.
4. There may be further migration necessary before you can process your data in version 11.0. Consult this guide for more information. Do not proceed until you have completed all necessary migration steps.
5. Select **Tools > Oracle Endeca Workbench Settings**. In the Oracle Endeca Workbench Settings dialog box, make sure that the machine name and port information for your Workbench host and port are correct. (The default port number is 8006.) Also make sure you select the appropriate application to associate with this project, because Workbench can support multiple applications.

   

   **Note:** Although the Developer Studio UI reads "Oracle Endeca Workbench," the settings apply to all Endeca Tools and Frameworks editions.

6. Save your changes.
7. From the **Tools > Oracle Endeca Workbench** menu, select **Set Instance Configuration**. This uploads the instance configuration from Developer Studio to Endeca Workbench.

If you had modified any pre-11.0 XML project files by hand (rather than through Developer Studio), check those files to make sure that the upgrade preserved your changes. For example, if you have a Chinese-language application, check your `languages.xml` and `stemming.xml` files to make sure that they are using the `zh-CN` or `zh-TW` language code (and not the incorrect `zh` code). Note that if you hand-edit the `stemming.xml`

file, the order of its `STEM` elements must match the order of the languages listed in the Developer Studio's Stemming Editor.

## Running a baseline update

Run a baseline update to start the Dgraphs.

To run a baseline update:

1. You can run a baseline update in the same manner as in your 6.x implementation. Oracle recommends using the Deployment Template to perform updates.
2. Optionally, start any other Endeca components required by your application, such as the Log Server component (if your baseline update script does not start it for you).

## Updating the APIs on the application server

After upgrading, ensure that the server or servers running your front-end application are using the latest versions of the Presentation API and Logging API.

The Presentation and Logging APIs are shipped as part of the Endeca Platform Services package.

Chapter 2

# Required Changes

You must make the changes specified in this section, if they apply to your application.

## Changes from 6.1.2 to 6.1.3

This section describes changes to Platform Services that occurred between version 6.1.2 and 6.1.3.

### The Endeca Control System is not supported

As part of the MDEX Engine 6.2.0 release, the Endeca Control System is unsupported. The Endeca Control System includes the Endeca JCD and the Control Interpreter, both of which have been deprecated since Endeca IAP 5.0.

You should use the Endeca Application Controller to control, manage, and monitor components in your Endeca implementation. For details, see the *Endeca Platform Services Application Controller Guide*.

The *Control System Guide* is no longer included in the Platform Services documentation set.

### The `VOID ID_LANGUAGE` expression is no longer supported

The `VOID ID_LANGUAGE` expression was typically used in a Record Manipulator to identify the language of a specified property and then add a language identifier property to a record. This expression is no longer supported.

Chapter 3

# Behavioral Changes

This section describes changes that do not require action on the developer's part, but will have an effect on how your Endeca application behaves after you upgrade.

## Changes from 6.1.0 to 6.1.1

This section describes behavioral general changes to the Endeca software when upgrading from Platform Services 6.1.0.

#### DVAL_STATIC_RANK attribute is reinstated in the STATS element

The `DVAL_STATIC_RANK` attribute has been reinstated in the XML Configuration Reference. This attribute specifies whether every dimension value's static rank should be returned as a property on the dimension value. The default value is `FALSE`.

Setting this attribute to `TRUE` causes the MDEX Engine to return the static rank with each dimension value. Like other attributes in the `STATS` element configuration, the value for this attribute can be specified both at the individual dimension level and at the global level.

**Note:** This attribute is reinstated starting with the MDEX Engine release 6.1.4. However, this attribute has been deprecated in 6.1.0-6.1.3 releases of MDEX Engine. For those releases, the MDEX Engine ignores this attribute and issues a warning about its presence in the file.