Hewlett Packard
Enterprise

HPE IDOL Search Optimizer

Software Version: 11.1.1

Installation Guide

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Chapter 1: Introduction

HPE IDOL Search Optimizer allows you to manage the contents of data indexed in HPE IDOL servers to optimize the search experience for your end users. You can create and modify promotions or keywords to predefine the results that are returned to users, and control how users view them. You can also view statistical information to help you refine the rules that you created and make them more effective.

Key features include:

- **Promotions**. Display a document or a set of documents to the user based on specified criteria. Additionally, you can increase the relevance of a document or pin it to a fixed position in the results list.

- **Blacklist management**. Set up and manage a list of terms to exclude automatically from any query.

- **Synonyms**. Create a list of synonyms so that when users search for particular words, the results also include synonyms of their search terms.

- **Statistics**. View various statistics about the business rules you defined, such as top and bottom promotions, or terms that do not return any results.

- **Test search results**. Test actions to understand why a search returns a particular set of results.

Chapter 2: Set Up HPE IDOL Search Optimizer

This section describes the supported platforms and software requirements for HPE IDOL Search Optimizer.

Prerequisites

HPE IDOL Search Optimizer supports the following operating systems:

- Windows Server 2008, 2008 R2, 2012, or 2012 R2
- Ubuntu 14.04 LTS
- RHEL/CentOS 6.4 and higher

HPE IDOL Search Optimizer supports the following web browsers:

- Chrome (latest version)
- Firefox (latest version)
- Internet Explorer 11 or higher
- Edge

External Requirements

Before you install HPE IDOL Search Optimizer, you must install and configure the following components and software:

HPE IDOL Components

- HPE IDOL QMS 11.1.1 (requires access to the service and ACI ports)
- HPE IDOL Agentstore 11.1.1 (requires access to the service, ACI, and index ports)
- HPE IDOL Community 11.1.1 (requires access to the service and ACI ports)

- HPE IDOL Statistics Server 11.1.1 (requires access to the service and ACI ports)
- HPE IDOL View Server 11.1.1 (requires access to the service and ACI ports)
- Access to an HPE IDOL Content 11.1.1 (requires access to the service and ACI ports)

> **Note:** The HPE IDOL Search Optimizer web application requires TCP network access to these HPE IDOL components. The HPE IDOL components do not need to be installed on the same host as the HPE IDOL Search Optimizer web application.

Third Party Software

- Java 1.8

HPE IDOL Search Optimizer Home Directory

You must specify the HPE IDOL Search Optimizer home directory as a Java system property, either in a startup script or within the appropriate application server configuration, depending on how the application is being deployed.

The home directory contains the following files:

- The HPE IDOL Search Optimizer configuration file (`config.json`). If this file is not found, HPE IDOL Search Optimizer generates a default configuration file when the application starts.

  You can edit the configuration file either from the Settings page in the application (recommended), or manually in a text editor. If you manually edit the file, you must restart HPE IDOL Search Optimizer for any configuration changes to take effect.

- The HPE IDOL Search Optimizer log file (`searchoptimizer.log`). This file records details of application events (for example, sending statistics updates to connected clients), login events (for example, when a specific user logs in successfully), and user actions (for example, when a specific user deletes a promotion). It also records application error messages where applicable.

  If you need to contact support, please include this log file when you send your query.

Chapter 3: User Roles

The HPE IDOL Search Optimizer application automatically creates two HPE IDOL Community roles:

- `ISOUser` – a user of the HPE IDOL Search Optimizer system. Users have access to all non-administrative HPE IDOL Search Optimizer functionality (that is, they can use the HPE IDOL Search Optimizer system, but cannot configure it).

- `ISOAdmin` – an administrative user of the HPE IDOL Search Optimizer system. Administrative users have access to the User Management and Settings pages to manage users and application configuration settings.

Chapter 4: Install HPE IDOL Search Optimizer

HPE IDOL Search Optimizer is available as an interactive installer.

Note: To upgrade to HPE IDOL Search Optimizer 11.1 from HPE IDOL Search Optimizer 11.0, you must delete your existing configuration file before you install the new version.

Use the Interactive Installer (Recommended)

You can install HPE IDOL Search Optimizer by using the interactive installer. This process creates all required directories, and sets up HPE IDOL Search Optimizer to run as a service. During installation, you are prompted to specify the home directory and the paths for installation.

Use the following procedure to install HPE IDOL Search Optimizer on Windows or Linux by using the interactive installer.

To install HPE IDOL Search Optimizer

- Run the installer as an Administrator user, and then follow the instructions, supplying the correct information when prompted.

HPE IDOL Search Optimizer is installed to the location that you specified.

Use the Zip Package

The zip package contains a `.jar` file, and an `install` directory that contains the individual installation files.

To install IHPE IDOL Search Optimizer on Ubuntu Linux

1. Ensure that all the software listed in External Requirements, on page 7 is installed, running, and available.

2. Create a user and group to run HPE IDOL Search Optimizer as. HPE recommends that you use `searchoptimizer` as both the user name and the group name:

   ```
   $ useradd searchoptimizer
   ```

3. Create a directory in which to install HPE IDOL Search Optimizer. HPE recommends that you use

/opt/searchoptimizer as the installation directory.

```
$ mkdir /opt/searchoptimizer
```

4. Create a directory to serve as the home directory for HPE IDOL Search Optimizer. HPE recommends that you use /opt/searchoptimizer/home as the home directory.

```
$ mkdir /opt/searchoptimizer/home
```

5. Copy the HPE IDOL Search Optimizer searchoptimizer.jar file into the installation directory:

```
$ cp searchoptimizer.jar /opt/searchoptimizer/
```

6. Recursively change the ownership of the installation directory:

```
$ chown -R searchoptimizer:searchoptimizer /opt/searchoptimizer
```

7. Deploy the startup script.

   - **System V:**

     ```
     $ cp install/linux/sysv/searchoptimizer.sh /etc/init.d/searchoptimizer
     $ chmod +x /etc/init.d/searchoptimizer
     $ update-rc.d searchoptimizer defaults 99
     ```

   - **Upstart:**

     ```
     $ cp install/linux/upstart/searchoptimizer.conf /etc/init/
     $ chmod +x /etc/init/searchoptimizer.conf
     ```

8. If you have used any non-default paths and so on during installation, edit the startup script to contain the values that you used.

9. Start the application.

   - **System V:**

     ```
     $ sudo /etc/init.d/searchoptimizer start
     ```

   - **Upstart:**

     ```
     $ sudo service searchoptimizer start
     ```

To install HPE IDOL Search Optimizer as a Windows Service

1. Download a copy of the Windows service wrapper from https://github.com/hpe-idol/winsw, and change the name of the winsw.exe executable file to searchoptimizer.exe.

2. The install directory in the HPE IDOL Search Optimizer installation zip package includes a Windows folder. This folder contains a winsw folder, which in turn contains a searchoptimizer.xml file. Move the searchoptimizer.exe file into this folder.

3. Ensure that the HPE IDOL Search Optimizer home directory and port are correctly configured in the searchoptimizer.xml configuration file. You must also ensure that searchoptimizer.exe, searchoptimizer.xml, and searchoptimizer.war are all in the same directory.

4. Run the following command from the Windows command line to install HPE IDOL Search Optimizer as a service:

```
searchoptimizer.exe install
```

Note: You can also use the following commands with searchoptimizer.exe:

- `uninstall`
- `start`
- `stop`
- `status`

For more information, see https://github.com/hpe-idol/winsw.

Before you start HPE IDOL Search Optimizer, follow the steps in Configure HPE IDOL Search Optimizer, on page 15, and ensure that you have set up the required user roles in HPE IDOL Community. A user must be a member of one of these roles to log into HPE IDOL Search Optimizer. See User Roles, on page 9 for more information.

Upgrade HPE IDOL Search Optimizer

If you are upgrading from HPE IDOL Search Optimizer 10.11, you must delete the `config.json` file from your home directory before you upgrade.

Chapter 5: Edit Configuration Settings

This section describes how to configure HPE IDOL Search Optimizer, Statistics Server, and View Server. It also includes information on how to configure language support.

Note: If you are upgrading from the 11.0 version of HPE IDOL Search Optimizer to the 11.1 version, you must delete your configuration file and run the configuration wizard again.

Configure HPE IDOL Search Optimizer

Use the following procedure to configure HPE IDOL Search Optimizer.

To configure HPE IDOL Search Optimizer

1. Run HPE IDOL Search Optimizer once without a `config.json` file in your HPE IDOL Search Optimizer home directory, so that a default file is generated.

   Note: By default, the installer stores the HPE ISO home directory in the `ProgramData` folder, which might be hidden by default in Windows.

2. Open the generated `config.json` file in a text editor and find the generated default user name and password at the top of the file (`login.defaultLogin.username` and `login.defaultLogin.password`).

3. In your web browser, go to `http://Hostname:Port`, where `Hostname` is the IP address or name of the machine on which HPE IDOL Search Optimizer is installed, and `Port` is the port that you have installed HPE IDOL Search Optimizer on (for example, `8080`).

   Note: For details of web browsers that are supported by HPE IDOL Search Optimizer, see .

4. Log in using the default user name and password from the configuration file.

   The Settings page opens.

5. Fill in the details of your backend HPE IDOL servers. Click **Test Connection** for each server to confirm that a connection can be established from the HPE IDOL Search Optimizer server.

6. Click **Save Changes**.

7. In the setup wizard, click **Next**. The User Management page opens.

8. Add your users, and then use the credentials for one of those users to log into the application.

HPE IDOL Search Optimizer is now ready for use.

Change Application Configuration Settings

Users with the `ISOAdmin` role can use the User Management and Settings pages to change the application configuration settings.

To open the User Management page

1. In the toolbar on the top right of the page, click .

2. In the list, click **Users**.

    The User Management page opens.

To open the Settings page

1. In the toolbar on the top right of the page, click .

2. In the list, click **Settings**.

    The Settings page opens.

Configure HPE Statistics Server

Use the following procedures to configure HPE Statistics Server and send statistics to the server.

> **Note:** The `install` folder is located in the installation zip package.

To configure HPE Statistics Server

1. Open `install/statsserver/cfg/statsserver-required-config.cfg`. This file contains the statistics definitions that the HPE Statistics Server requires. Copy the definitions from `statsserver-required-config.cfg` to your HPE Statistics Server configuration file.

    > **Note:** If you want to include extra statistics definitions that are not included in `statsserver-required-config.cfg`, those extra statistics must have an HPE IDOL name in order for the server to start.

2. Restart HPE Statistics Server.

For information on how to send statistics to HPE Statistics Server, see the *HPE Query Manipulation Server Administration Guide*. For your convenience, a modified version of the Perl script described in the *HPE Query Manipulation Server Administration Guide* is included in `install/statsserver/script/stats.pl`.

Configure HPE IDOL Language Support

You must configure UTF-8 encoding in HPE IDOL for each language that your users want to use with HPE IDOL Search Optimizer. For more information, see the *HPE IDOL Server Administration Guide*.

Configure HPE View Server

HPE IDOL Connectors take documents from the original repository and index them into HPE IDOL Server. You must use the Settings page to edit the HPE IDOL Search Optimizer configuration to include the reference field in each of your documents that contains details of the location of the document in the original repository. This depends on how you indexed your data; for example, if you used HPE HTTP Connector, you must configure the reference field as DREREFERENCE in the HPE IDOL Search Optimizer configuration file.

Users with the ISOAdmin role can use the Settings pages to configure the HPE View Server Reference field.

To configure HPE View Server

1. In the toolbar on the top right of the page, click .
2. In the list, click **Settings**.

   The Settings page opens.
3. In the **View** section, type the reference field to use.
4. Click **Save Changes**.

Chapter 6: Clustering

HPE IDOL Search Optimizer 11.1.1 does not support clustering of the web application.

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