

Endeca® Discovery Framework

Feature Catalog



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Preface

Endeca® Latitude applications guide people to better decisions by combining the ease of search with the analytic power of business intelligence. Users get self-service access to the data they need without needing to specify in advance the queries or views they need. At the same time, the user experience is data driven, continuously revealing the salient relationships in the underlying data for them to explore.

The heart of Endeca's technology is the MDEX Engine.™ The MDEX Engine is a hybrid between an analytical database and a search engine that makes possible a new kind of Agile BI. It provides guided exploration, search, and analysis on any kind of information: structured or unstructured, inside the firm or from external sources.

Endeca Latitude includes data integration and content enrichment tools to load both structured and unstructured data. It also includes the Discovery Framework, a set of tools to configure user experience features including search, analytics, and visualizations. This enables IT to partner with the business to gather requirements and rapidly iterate a solution.

About this guide

This guide contains information about the features that make up the Endeca Discovery Framework.

The Discovery Framework enables rapid configuration of dashboard applications that offer the highly interactive Guided Navigation® user experience across a full range of structured and unstructured enterprise data.

The Discovery Framework is easy to deploy and ideal for the agile development of enterprise-quality applications. Due to component-based nature of the Discovery Framework, these applications are simple to control, adapt, and extend. It provides granular layout and configuration control to enable users to manage and personalize their own experiences.

The Discovery Framework consists of an enterprise-class portal framework and a library of UI components that embody best practices in Endeca applications. In addition, it includes a Component SDK, which is a packaged development environment for portlets, themes, layout templates, and other portal element. Endeca has modified Liferay's version of its Plugins SDK to include the Endeca enhancements, such as the `EndecaPortlet` core class.

Who should use this guide

This guide is intended for end users and power users of the Endeca Discovery Framework on Windows or Linux.

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 Endeca Customer Support

The Endeca Support Center provides registered users with important information regarding Endeca software, implementation questions, product and solution help, training and professional services consultation as well as overall news and updates from Endeca.

You can contact Endeca Standard Customer Support through the Support section of the Endeca Developer Network (EDeN) at <http://eden.endeca.com>.



Part 1

Discovery Framework features

- *Discovery Framework features*
- *Discovery Framework performance considerations*



Chapter 1

Discovery Framework features

This section discusses features of the Discovery Framework application.

About page transitions

Page transitions allow a component on one page in your Discovery Framework application to pass data to a component on another page. In addition, page transitions let you specify the tab state on a tabbed component on that page.

For example, you might have a **Results Table** component on one page and a **Record Details** component on another page. The **Results Table** component could be configured to target the **Record Details** component through a page transition.

The page transitions feature is implemented by your component developer, but the power user can specify transition targets that will appear in the end user's application. In the example below, the power user set the target page for the **Record Details** component to a **Find Similar** component placed on the **Comparisons** page.

Record Details [Return to Full Page](#)

default

[Update data source](#)

Display Name Property (e.g. '12345' in the title 'Record 12345')

p_RecordSpec

Find Similar Target Page

Comparisons

Save



Note: For details about implementing page transitions, see the *Power User's Guide*.

About deep linking

Deep linking allows users to construct URLs that take them from an external site to a target page in the Discovery Framework. In effect, these URLs act as external bookmarks to the Discovery Framework.

Pages targeted by deep linking inbound portal URLs must already exist within the Discovery Framework, and contain zero or more Endeca components bound to one or more data sources. The URLs encode the data source filter state for any or all of the data sources defined in the application. Any query filter supported by the data source JSON files is supported in the URL. Navigation by dimension values is also supported.

Users construct these URLs based on a query URL template, which define filters for a number of data sources for that user request.



Note: For more information about deep linking, see the *Power User's Guide*.



Chapter 2

Discovery Framework performance considerations

This section discusses factors to take into account when developing applications.

Discovery Framework performance considerations

When planning and building Discovery Framework applications, keep in mind the following performance considerations.

- Like any Web-based application, the Discovery Framework is subject to browser limitations.
- The Discovery Framework is a rich Internet application that uses JavaScript to retrieve data in real time. Therefore, the amount of data you are accessing will affect performance.
- Attempting to process large numbers of dimensions or dimension values can result in information overload, particularly in components such as **Guided Navigation**.
- Within a Discovery Framework application, a large number of components on a single page can negatively impact performance. Rather than place many components on a single Discovery Framework page, you should consider using a multi-page application design. The number of pages in an application has no impact on performance.
- Endeca Analytics is a rich and complex language. To ensure that you understand the performance implications of the Analytics queries you are building, consult the *Analytics Considerations and Best Practices* article, which is available for download from the Endeca Developer Network ([EDeN](#)).
- Because the Discovery Framework leverages the MDEX Engine platform, it responds to many of the same performance strategies. For more detailed information, see the *MDEX Engine Performance Tuning Guide*, which is available for download or search on [EDeN](#).



Part 2

Discovery Framework components

- [*Discovery Framework component features*](#)
- [*About Endeca standard components*](#)
- [*About Liferay components*](#)



Chapter 3

Discovery Framework component features

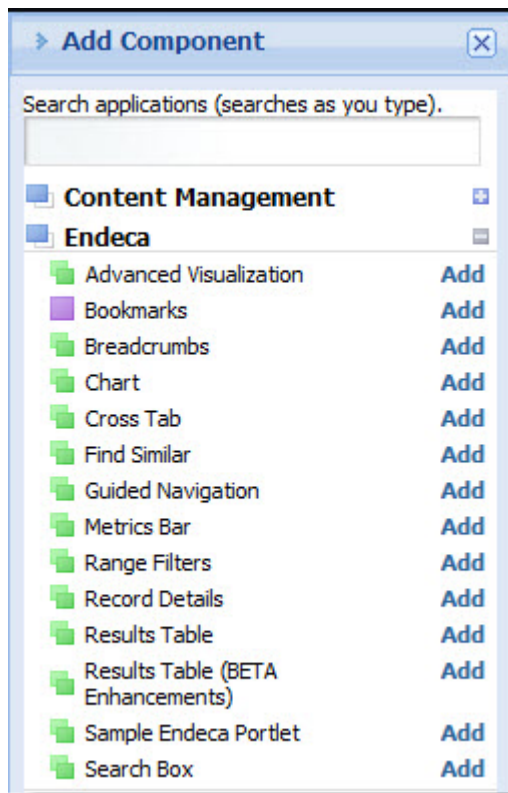
This section describes features common to Discovery Framework components.

About components

The Discovery Framework is a portal application, built on the Liferay Portal, that you populate with portlet components.

Endeca standard components are Discovery Framework portlets provided by Endeca. These components contain the logic needed to retrieve and manipulate data from the MDEX Engine and render results. Each Endeca standard component is a self-contained unit that provides specific MDEX Engine features or other application support. By assembling these components together, you can rapidly develop robust search applications.

The set of Endeca standard components includes a selection of administrative components, such as **Data Sources** and **Performance Metrics**, that help you configure and control your application.



This section describes the way each Endeca-developed component works, and notes any interaction dependencies between components. It also provides basic information about the Liferay components that Endeca makes available by default. It does not include step-by-step instructions for using components.

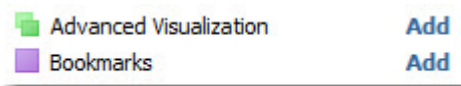
Components can be customized or developed to meet specific needs. This catalog does not cover this process, nor does it discuss the wide range of optional Liferay components that a user could add to the Discovery Framework.

About instanceable and non-instanceable components

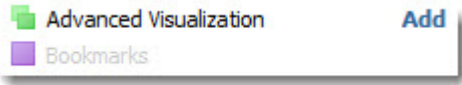
Liferay distinguishes between two kinds of components:

- *Instanceable* components can appear multiple times on a page. Each instance of the component has its own data source.
- *Non-instanceable* components can only appear once per page. If you place the component on additional pages, it will display the same data as the original instance.

Whether a component is instanceable or non-instanceable is indicated in the **Add Component** menu: a green icon identifies a component as instanceable, and a purple icon identifies a component as non-instanceable. In the image below, the **Advanced Visualization** component is instanceable. The **Bookmarks** component is not.



After adding the **Bookmarks** component to the page, it is no longer available, as you can see in the following image:



If you have multiple pages in your application, you could place **Bookmarks** on other pages, but the list of bookmarks in the component would be the same.

About case sensitivity in the Discovery Framework

The Discovery Framework is case sensitive.

About dimension search in the Discovery Framework

You must enable wildcard search on any dimension you want to do dimension search against.

About data support in the Discovery Framework

The Discovery Framework supports only English data.

Discovery Framework Analytics support

Many Discovery Framework components, including **Advanced Visualization**, **Chart**, and **Cross Tab**, require the use of Endeca Analytics, a separate product. Contact your Endeca representative for details on how to obtain Endeca Analytics.

About component users

This catalog provides information about components from the perspective of two distinct Discovery Framework users. These users have different objectives and different access to component controls.

Several job roles might fit into each category.

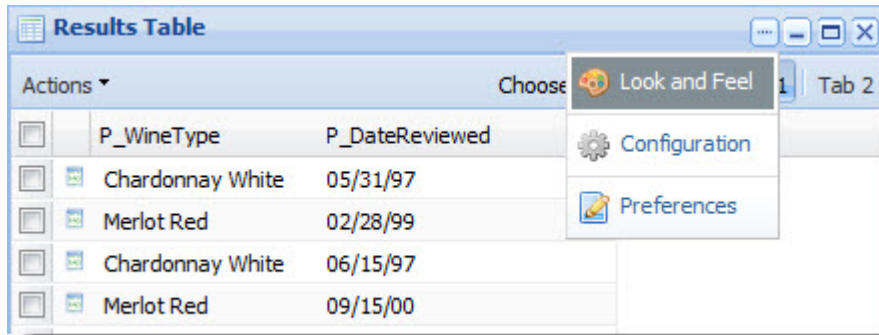
- **Power users** configure Discovery Framework content. One example would be a business analyst who configures the Discovery Framework for end users and determines what components and data they can access.
- **End users** are Discovery Framework content consumers. This includes executives seeking a dashboard view as well as others who need to drill through interactive visualizations and reports. Typically, the Discovery Framework is configured so that end users cannot access the edit controls found on the **Preferences** page of each component.



Note: Occasionally this catalog may mention tasks that other Discovery Framework users, such as application developers or data developers, perform. These tasks are not covered in detail in this guide.

Modifying component appearance

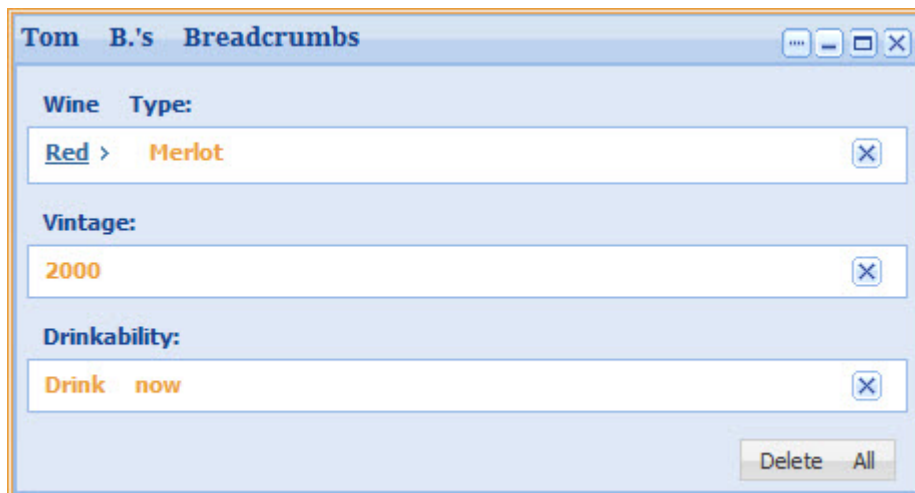
In any component, the power user can modify certain aspects of the component's appearance on the **Look and Feel** page.



For example, with slight modifications, the default appearance and text on the **Breadcrumbs** component:



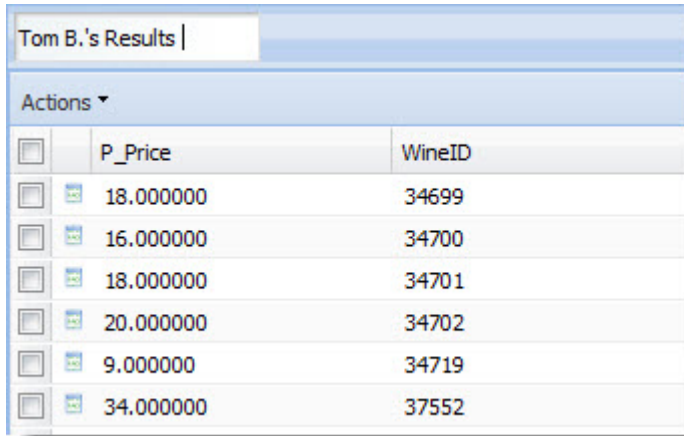
can be customized as follows:



Changing component display names

The power user has the ability to modify the display name of any component simply by double-clicking the name in the component's header.

For example, the display name of the **Results Table** component can be customized as follows:



The screenshot shows a component window titled "Tom B.'s Results". Below the title bar is a header bar with a label "Actions" and a dropdown arrow. Below the header is a table with two columns: "P_Price" and "WineID". The table contains seven rows of data. Each row has a small square icon to the left of the "P_Price" value.

	P_Price	WineID
<input type="checkbox"/>	18.000000	34699
<input type="checkbox"/>	16.000000	34700
<input type="checkbox"/>	18.000000	34701
<input type="checkbox"/>	20.000000	34702
<input type="checkbox"/>	9.000000	34719
<input type="checkbox"/>	34.000000	37552



Chapter 4

About Endeca standard components

Endeca standard components are pre-packaged components that provide access to MDEX Engine functionality and other features useful to application development.

Administrative components

The components in this section control administrative aspects of the Discovery Framework.

Related Links

[Data Sources](#) on page 27

The **Data Sources** component allows you to view configured data sources and test the connection to them. In addition, you can reload updated configuration based on edits you have made on disk.

[Attribute Settings](#) on page 23

The **Attribute Settings** component allows the power user to create, edit, and delete attribute sets and change display names for any attribute in a selected data source.

[Framework Settings](#) on page 30

The **Framework Settings** component provides access to state, security, and other settings.

[Performance Metrics](#) on page 33

The **Performance Metrics** component displays information about component and MDEX Engine query performance.

[Sample Endeca Portlet](#) on page 35

The **Sample Endeca Portlet** component provides developers with a template from which they can build their own custom components.

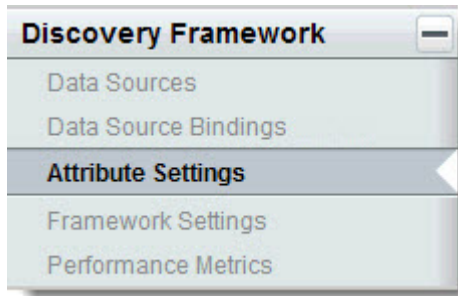
Attribute Settings

The **Attribute Settings** component allows the power user to create, edit, and delete attribute sets and change display names for any attribute in a selected data source.

An attribute set is a collection of dimensions and properties associated with the named data source. They allow you to organize your properties and dimensions into named groups.



Note: This component appears in the Liferay **Control Panel** and is not accessible from the **Add Component** menu.



Using Attribute Settings

End users generally should not modify the information located on the **Attribute Settings** section of the **Control Panel**.

Configuring Attribute Settings

Because the **Attribute Settings** component does not display as an independent portlet, it is not configured in the same way as most Endeca standard components. Instead, you modify these settings in the **Control Panel**.

Attribute Settings

Allows you to create, edit, and delete attribute sets and attribute display names.

Select a data source:

default

All Attributes		Attribute Sets
<input type="checkbox"/>	Attribute Name ▲	Other
<input type="checkbox"/>	ADG Refinement Center	P_WineType
<input type="checkbox"/>	Body	Endeca.NumWords
<input type="checkbox"/>	Designation	P_Flavor
<input type="checkbox"/>	Drinkability	P_WineID
<input type="checkbox"/>	Endeca.DataSize	Endeca.NumAssigns
<input type="checkbox"/>	Endeca.NumAssigns	Region
<input type="checkbox"/>	Endeca.NumWords	P_Score
<input type="checkbox"/>	Flavors	Drinkability
<input type="checkbox"/>	P_Body	P_Region
<input type="checkbox"/>	P_DateReviewed	P_DateReviewed
<input type="checkbox"/>	P_Description	P_Year
<input type="checkbox"/>	P_Designation	P_Winery
<input type="checkbox"/>	P_Drinkability	P_Designation
<input type="checkbox"/>	P_Flavor	P_Body
<input type="checkbox"/>	P_Name	P_Drinkability
<input type="checkbox"/>	P_Price	Body
<input type="checkbox"/>	P_Region	P_Price
		Price Range

Add selected attributes to set

Create a new set ...

- **Data source controls:** Select from the available data sources in the drop-down list.

Select a data source:

default ▼

Select a data source

default

bizwine

Bizwine: Importer Suppliers

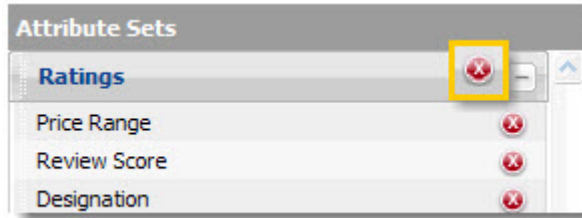
v7-default

- **Load from MDEX:** Create new attributes and sets based on the contents of the MDEX Engine.

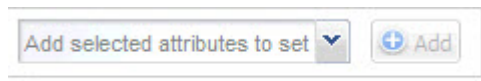
- **Create a new attribute set:** Create a new attribute set, and then select the attributes that populate it.



- **Delete an attribute set:** Delete an entire attribute set.



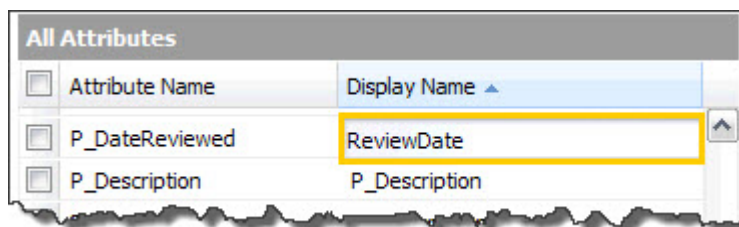
- **Add attributes to a set:** Check attributes in the **All Attributes** list and then add them to the selected set.





- **Remove attributes from a set:** Remove a single attribute from a set.



- **Change the global display name for an attribute:** Edit the display name of an attribute in the **All Attributes** list.



 **Note:** Attributes may be added to multiple sets, but there can only be a single display name for any given attribute.

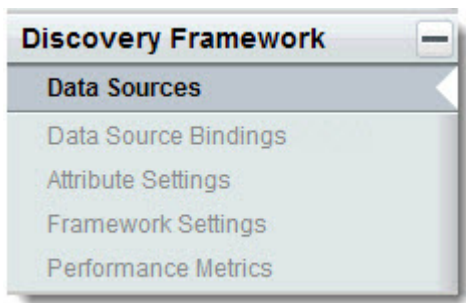
 **Note:** You cannot move an attribute between sets. To accomplish the same thing, first delete the attribute from its current set, and then add it to another set.

Data Sources

The **Data Sources** component allows you to view configured data sources and test the connection to them. In addition, you can reload updated configuration based on edits you have made on disk.



Note: This component appears in the Liferay **Control Panel** and is not accessible from the **Add Component** menu.



Each Discovery Framework component that needs to query the MDEX Engine is tied to one particular data source. Changing any individual component's data source is done in that component's edit controls.



Note: For general information about Discovery Framework data sources, see the *Discovery Framework Installation Guide*. For information about data source configuration, security, and state management, see the *Discovery Framework Extension Guide*.

Using Data Sources

End users do not see the **Data Sources** component.

Configuring Data Sources

The **Data Source** component requires no configuration—you simply place it on the page.

When you open the **Data Sources** component, you can see all of the data sources that have been configured for your application, as well as the version of the MDEX Engine they are using (`ENE_QUERY` for MDEX 6).



By clicking a data source's icon (highlighted below), you can test the data source's connection. The icon changes and mousing over it provides a confirmation message.



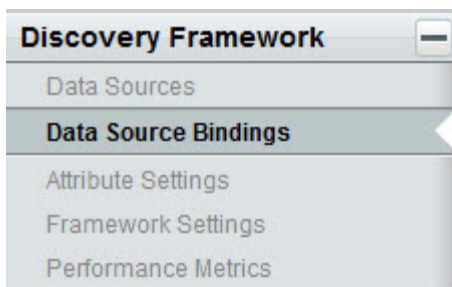
To reload updated configuration based on edits made on disk, you click the **Reload data sources** button. (For details on making these edits, see the *Discovery Framework Extension Guide*.)



Note: Configuration of data sources themselves takes place offline.

Data Source Bindings

The **Data Source Bindings** component allows the power user to associate different configured data sources with selected components in a single operation, rather than on a per-component basis.



Using Data Source Bindings

End users generally should not modify the information located on the **Data Source Bindings** section of the **Control Panel**.

Configuring Data Source Bindings

Because the **Data Source Bindings** component does not display as an independent portlet, it is not configured in the same way as most Endeca standard components. Instead, you modify these settings in the **Control Panel**.

The **Data Source Bindings** component allows you to see all data-source-backed components on each page in your application and associate data sources with them, without having to configure them individually.

To associate components with a particular data source, check the components, select the data source from the drop down list, and click **Update data source**.

Data Source Bindings

Welcome

- ☐ Breadcrumbs : default
- ☒ Guided Navigation : default
- ☒ Record Details : default
- ☒ Find Similar Portlet : default

mdex7

- ☐ Breadcrumbs : v7 bizwine
- ☐ Guided Navigation : v7 bizwine
- ☐ Results Table : v7 bizwine

appcity

Endeca Record Details Portlet

- ☐ Record Details : default
- ☐ Find Similar Portlet : default
- ☐ Results Table : default

Find-Similar-Page

Select a data source

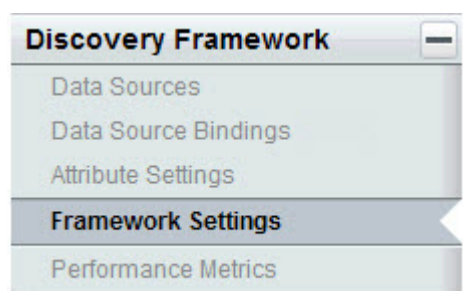
Framework Settings

The **Framework Settings** component provides access to state, security, and other settings.



Note: This component appears in the **Control Panel** and is not accessible from the **Add Component** menu.

Many settings related to Discovery Framework can be adjusted from the **Discovery Framework Settings** section of the **Control Panel**.



The default values of these settings are created automatically upon first use. You cannot add or delete settings from the **Control Panel**—you can only edit them. Settings only appear after the feature(s) that use them have been executed at least once. For example, if you have never used the **Chart** component, the **Corda Server URL** settings will not appear.

Using Framework Settings

End users generally should not modify the information located on the **Discovery Framework Settings** section of the **Control Panel**.

Configuring Framework Settings

Because the **Framework Settings** component does not display as an independent portlet, it is not configured in the same way as most Endeca standard components. Instead, you modify these settings in the **Control Panel**.



Note: Take care when modifying these settings, as incorrect values can cause problems with your Discovery Framework application.

Framework Settings

Warning! Incorrect values for these settings can cause serious problems with your Discovery Framework application. Please do not change these settings unless you are sure of what you are doing.
You must restart the Discovery Framework in order for changes to these settings to take effect.

df.attributeCacheEnabled:	<input type="text" value="true"/>	<i>Cache MDEX Engine-controlled attribute metadata per session. Set this to false to retrieve this metadata directly from the data source whenever required. This will be slow. This setting will take effect for new sessions.</i>
df.cordalmImageAuthEnabled:	<input type="text" value="false"/>	<i>Image Authorization (BETA): Whether to secure Corda chart image URLs so they're only accessible to the user who requested them</i>
df.cordaServerExternalUrl:	<input type="text" value="http://appdev-x2k8-p3.eng.endeca.com:8080/corda/server"/>	<i>The externally-accessible URL of the Corda server.</i>
df.cordaServerInternalUrl:	<input type="text" value="http://localhost:8080/corda/server"/>	<i>The internally-accessible URL of the Corda server.</i>
df.cordaServerRedirectorUrl:	<input type="text" value="http://appdev-x2k8-p3.eng.endeca.com:8080/endeca-corda-chart-portlet/ctRedirector"/>	<i>The URL of the Corda Redirector.</i>
df.dataSourceDirectory:	<input type="text" value="\${liferay.home}/data/endeca-data-sources"/>	<i>The directory on disk from which to load the Data Source definition files. This must be an absolute path. You may start this value with the token "\${liferay.home}" to represent the Liferay portal root.</i>
df.deepLinkPortletName:	<input type="text" value="endecadeeplinkportlet_WAR_endecadeeplinkportlet"/>	<i>The name of the deep link portlet.</i>
df.defaultDataSource:	<input type="text" value="default"/>	<i>The id of the data source to be used by default for new portlets.</i>
df.defaultExporter:	<input type="text" value="com.endeca.export.CSVExport"/>	<i>The default exporter class.</i>
df.exportPortletName:	<input type="text" value="endeca-results-export-portlet_WAR_endeca-results-export-portlet"/>	<i>This is the default name of the export portlet that can be used with p_p_id.</i>
df.healthCheckTimeout:	<input type="text" value="5000"/>	<i>The time in milliseconds for a timeout when checking the health of the...</i>

The **Framework Settings** component contains the following settings:

- **df.attributeCacheEnabled:** Controls whether to cache or retrieve attribute metadata controlled by the MDEX Engine.
- **df.cordalmImageAuthEnabled:** Controls whether Corda chart image URLs are secured.



Note: The Corda image authorization feature is in Beta for this release and is not supported.

- **df.cordaServerExternalUrl** and **df.cordaServerInternalUrl:** The externally and internally accessible URLs of the Corda Server, which is used by the **Chart** component.
- **df.cordaServerRedirectorUrl:** The URL of the Corda Redirector, which can be used by the **Chart** component.

- **df.dataSourceDirectory:** The directory on disk from which to load data source definition files.
- **df.deepLinkPortletName:** The name of the deep link component.
- **df.defaultDataSource:** The name of the data source to use as the default.
- **df.defaultExporter:** The default exporter class.
- **df.exportPortletName:** The default name of the export portlet.
- **df.healthCheckTimeout:** The time (in milliseconds) for query timeout when checking data source availability on initialization.
- **df.maxExportAnalyticsRecords:** The maximum allowable number of Analytics records that can be exported.
- **df.mdexCacheManager:** This setting is not supported in production.
- **df.maxExportBaseErrors:** The maximum allowable number of non-Analytics records that can be exported.
- **df.mdexStateManager:** The fully-qualified class name to use for the MDEX State Manager.
- **df.mdexSecurityManager:** The fully-qualified class name to use for the MDEX Security Manager.



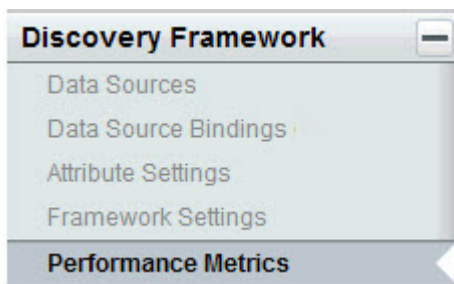
Note: If you do not see the **Discovery Framework Settings** in the **Control Panel**, it probably means you did not install the `endeca-framework-settings-portlet-<version>.war` file. Please review your installation settings.

Performance Metrics

The **Performance Metrics** component displays information about component and MDEX Engine query performance.



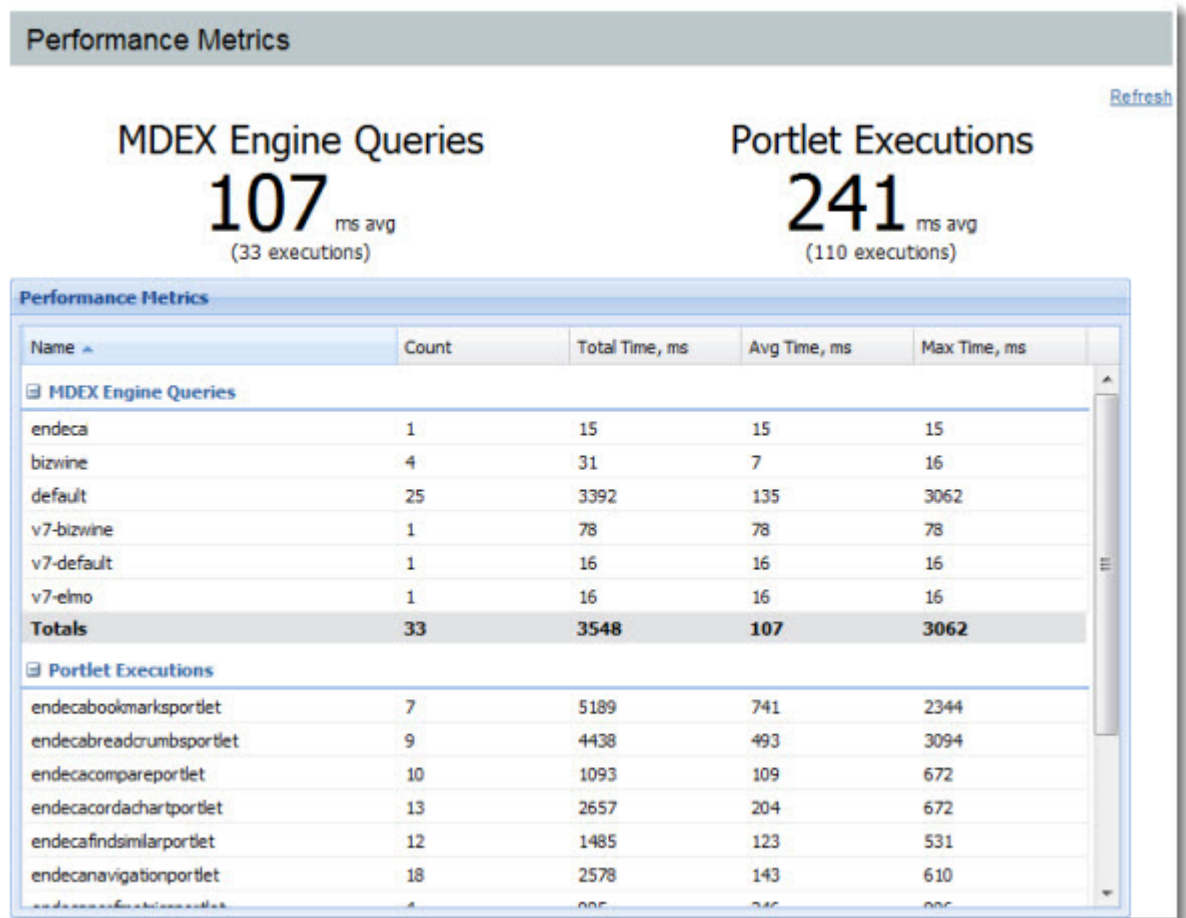
Note: This component appears in the Liferay **Control Panel** and is not accessible from the **Add Component** menu.



The **Performance Metrics** component comes pre-configured and does not require a backing data source.

Using Performance Metrics

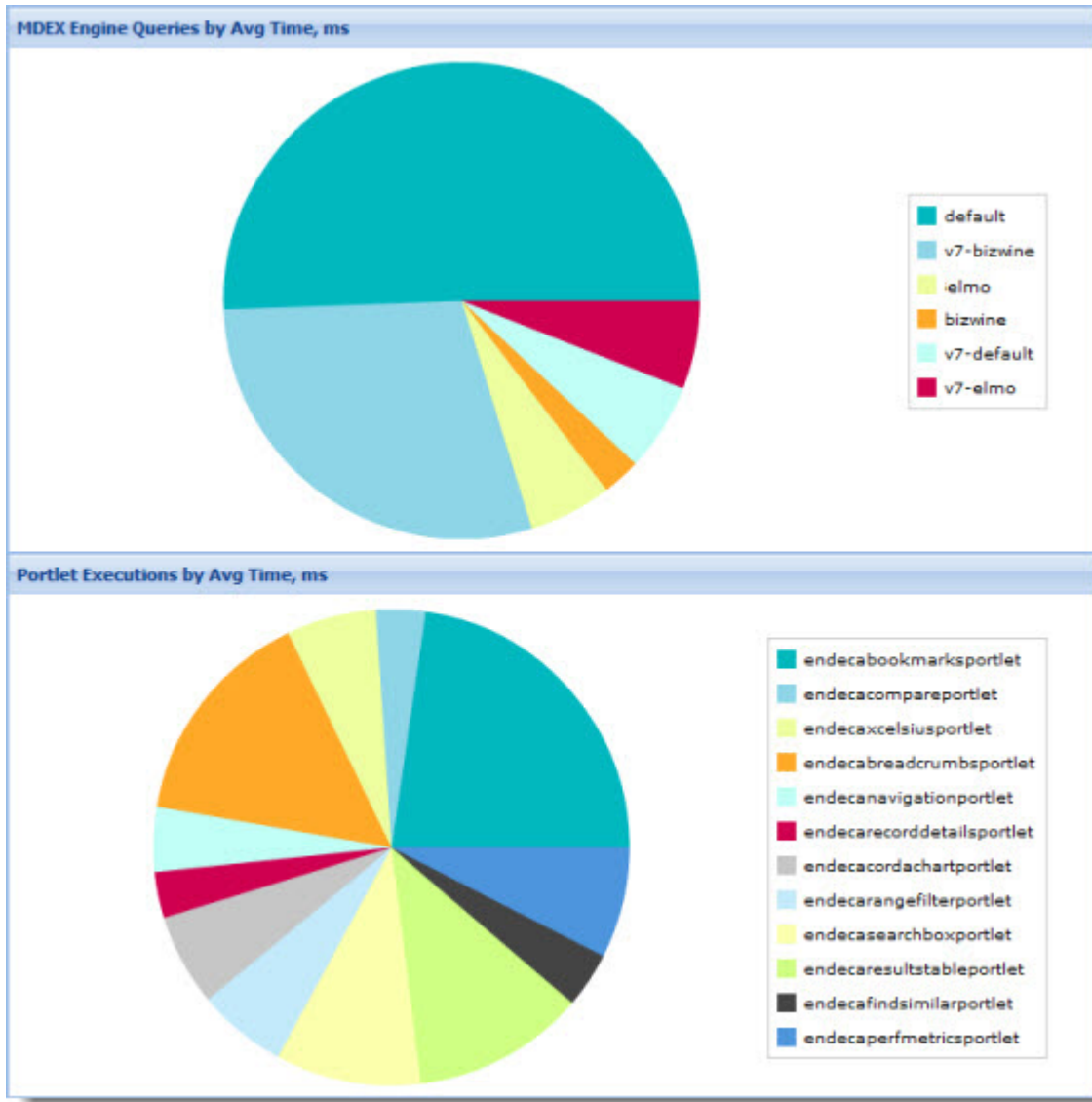
This topic describes how an end user can use the **Performance Metrics** component.



The **Performance Metrics** component tracks total MDEX Engine queries as well as queries per data source. It also tracks the overall performance of portlet components as well as the performance of each individual component.

The top portion of the component contains breakdowns of MDEX Engine queries by data source, as well as details on individual component executions. The **Performance Metrics** component tracks the total number of queries, total execution time of queries, average execution time of queries, and maximum query execution time.

The bottom portion of the component summarizes the average time metrics in pie-chart form.



Note: This component provides a view into MDEX Engine query performance, which does not correlate directly to a page view, as there are often multiple MDEX Engine queries powering a single page.

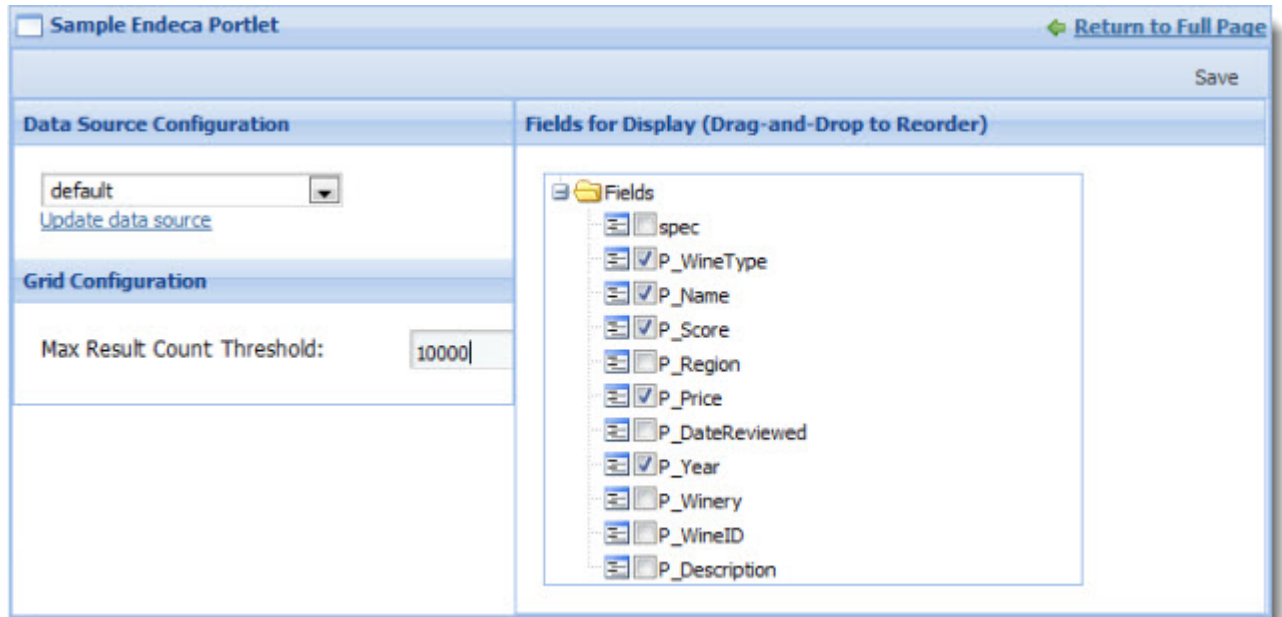
Configuring Performance Metrics

The **Performance Metrics** component requires no configuration—you simply add it to the portal workspace.

Sample Endeca Portlet

The **Sample Endeca Portlet** component provides developers with a template from which they can build their own custom components.

This component is provided as a starting point for developers who want to create their own components.



Using Sample Endeca Portlet

The **Sample Endeca Portlet** component is not intended for use by end users.

Configuring Sample Endeca Portlet

The **Sample Endeca Portlet** component is not intended for use by power users.

Layout components

The components in this section provide additional control over Discovery Framework display.

Related Links

[Tabbed Component Container](#) on page 36

The **Tabbed Component Container** allows developers to create a tabbed interface within a region of a page and then store different components on various tabs.

Tabbed Component Container

The **Tabbed Component Container** allows developers to create a tabbed interface within a region of a page and then store different components on various tabs.

The **Tabbed Component Container** is the only Endeca-developed layout control. This component is available under the **Layout Control** section of the **Add Component** menu, and not the **Endeca** section.

This component allows a user to create a tabbed interface within a region of a page, and then nest different components on the available tabs. For example, you might choose to put a **Results Table** component containing customer-based information on one tab, and another **Results Table** component containing product-based information on another tab.



Note: After placing the **Tabbed Component Container** on the page, make sure to refresh the page before attempting to add other components to the tabs.

Using the Tabbed Component Container

End users do not access the **Tabbed Component Container** directly, though a power user might include one or more instances in the end users' application.

Configuring the Tabbed Component Container

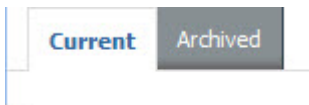
The power user can set the following preferences for the **Tabbed Component Container** component.

The screenshot shows the configuration interface for the **Tabbed Component Container**. It has a title bar with a "Return to Full Page" link. Below the title bar are three tabs: **Setup**, **Permissions**, and **Sharing**. Under the **Setup** tab, there are two sub-tabs: **Current** and **Archived**. The main area is titled **Tabs** and contains a table with the following columns: **Drag to reorder**, **Tab Name** (with a "Click to edit" link), and **Tab Layout**. There are two rows in the table: **Tab 1** and **Tab 2**, both with a "1 Column" layout and a "Delete tab" button. Below the table is a "New tab name" input field and a "Create new tab" button. At the bottom, there is a **Display Settings** section with a "Show Borders" checkbox (checked) and a "Save" button.

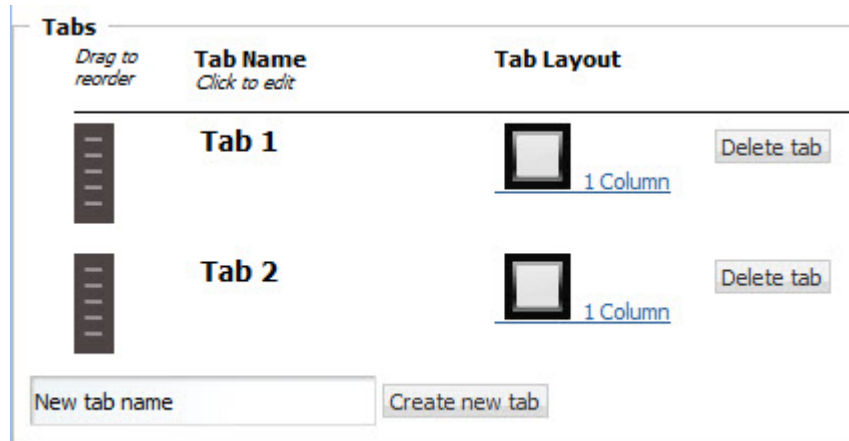


Note: Only the configuration tasks on the **Setup** tab are relevant to our purposes. You may disregard the other tabs.

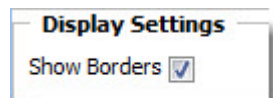
- You can edit the current tabbed component container, or select an archived version (if available).



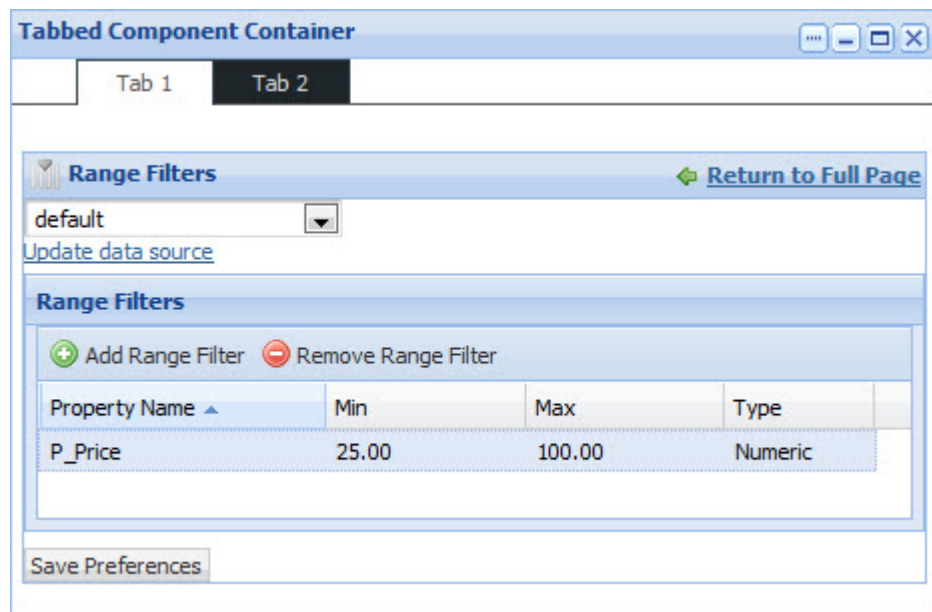
- Tabs:** Add or delete tabs, as well as change their layouts, display names, and order on the page.



- **Display Settings:** Check **Show Borders** to draw the component container around the components on each tab.



Drag the configured **Tabbed Component Container** onto the portal work area, then drag other components onto the tabs and configure them as usual. In the example below, the **Range Filter** component has been dragged onto Tab 1.



Personalization components

The components in this section allow users to customize their Discovery Framework application.

Related Links

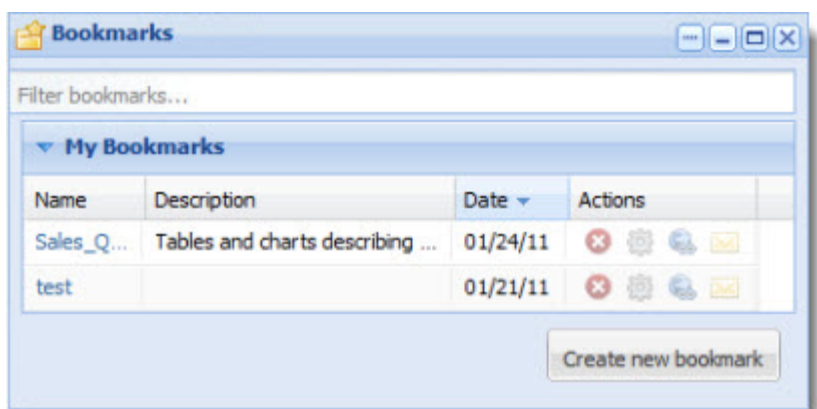
[Bookmarks](#) on page 39

Bookmarks is a personalization component that allows the end user to save a given navigation and component state in order to be able to share it or return to it at a later time.

Bookmarks

Bookmarks is a personalization component that allows the end user to save a given navigation and component state in order to be able to share it or return to it at a later time.

Once a bookmark has been created, the user can click upon it to return to that state. Bookmarks are listed in the order they were created, along with an accompanying description and date.



Note: The **Bookmarks** component does not require a backing data source. It stores and retrieves data from the underlying Liferay database.

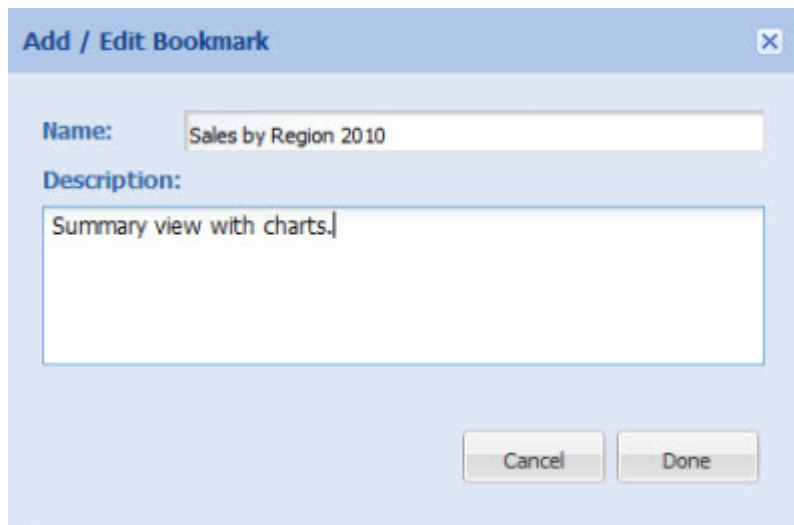


Note: The **Bookmarks** component supports the use of aggregated records. For details about configuring Discovery Framework data sources for aggregated records, see the *Discovery Framework Installation Guide*.

Using Bookmarks

The **Bookmarks** component allows the end user to create, edit, delete, and share bookmarks.

To add a new bookmark, click **Create new bookmark**. The **Add / Edit Bookmark** dialog box, where you can fill in the **Name** and **Description**, displays. Click **Done** to add the bookmark.











Add / Edit Bookmark


Name: Sales by Region 2010


Description:
Summary view with charts.

Cancel Done

Once a bookmark has been created, four icons appear next to it:

Parts by ...	Jim's view	01/24/11				
Sales by ...	Summary view with charts.	01/24/11				

To delete a bookmark, click the **Delete** icon .

To edit a bookmark, click the **Edit** icon , which re-opens the **Add / Edit Bookmark** dialog box.


To capture and copy the URL of a bookmark, click the **Create link** icon , which opens the **Bookmark URL** dialog box:

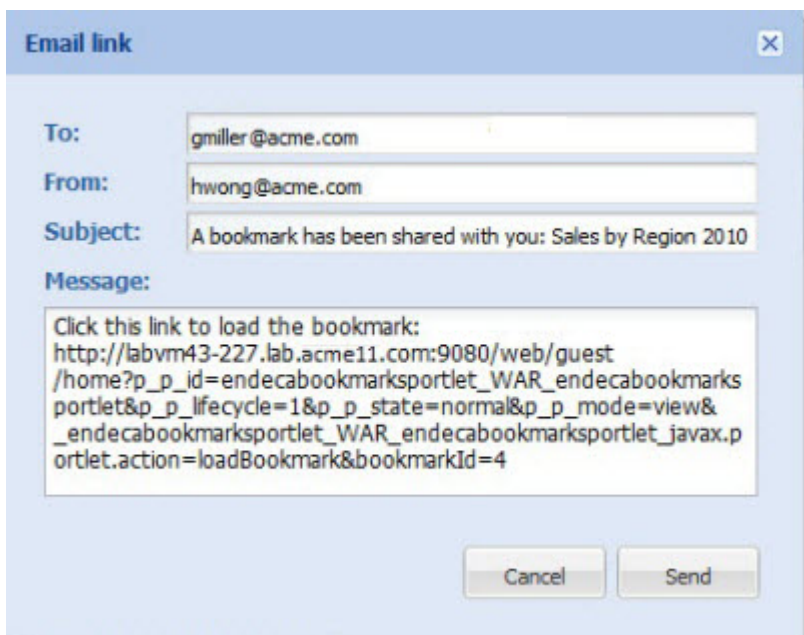


Bookmark URL

Copy and paste this URL: http://aturn43-227-361.endeca.com:9080/web/guest/home?p_p_id=endecabookmarksportlet_WAR_endecabookmarksportlet&p_p_lifecycle=1&p_p_state=normal&p_p_mode=view&_endecabookmarksportlet_WAR_endecabookmarksportlet_javax.portlet.action=loadBookmark&bookmarkId=4 [select](#)

Done

To email the URL of a bookmark to another user, click the **Email** icon , which opens the **Email link** dialog box, pre-populated with everything except the **To:** field:



The dialog box is titled "Email link" and contains the following fields:

- To:** gmiller@acme.com
- From:** hwong@acme.com
- Subject:** A bookmark has been shared with you: Sales by Region 2010
- Message:**

Click this link to load the bookmark:
http://labvm43-227.lab.acme11.com:9080/web/guest/home?p_p_id=endecabookmarksportlet_WAR_endecabookmarksportlet&p_p_lifecycle=1&p_p_state=normal&p_p_mode=view&_endecabookmarksportlet_WAR_endecabookmarksportlet_javax.portlet.action=loadBookmark&bookmarkId=4

At the bottom are "Cancel" and "Send" buttons.



Note: In order to use the email feature, the Discovery Framework administrator must set up the email server, as described later in this section.

What Bookmarks saves for each component type

This topic describes what parts of the component state are saved in the bookmarks created by the **Bookmarks** component.



Note: Administrative components are not saved in bookmarks, so they are not included here.

Component	Persisted States	Comments
Advanced Visualization	Developer-driven	<p>The data persisted in a bookmark for this component is specific to the SAP Dashboard Design (Xcelsius) movie being used. It is therefore the responsibility of the movie developer to define which elements are to be persisted. This requires two movie components to be defined via the Xcelsius Data Manager:</p> <ol style="list-style-type: none"> 1. Definition of name-value pairs (established in the Flash Variables data connection) for each stateful design element in the UI. For example, the Drilldown Chart example movie includes an "Average Price by:" drop-down control that drives the Analytics grouping used to render the chart. This is backed by a Flash Variable called "selectedGroupBy" whose value is bound to that of the drop-down selection, so that when a bookmark is loaded, the correct grouping is applied based on which grouping was selected when the bookmark was created. That is, if a user selected "Vintage"

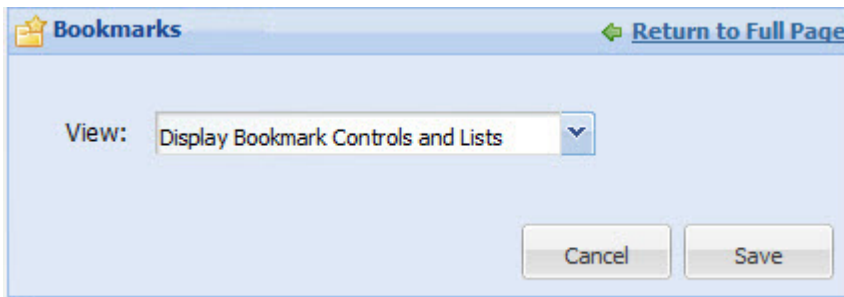
Component	Persisted States	Comments
		<p>from the drop-down and then created a bookmark, then Vintage should be the selected drop-down value when the movie is loaded from a bookmark.</p> <p>2. An External Interface Connection (EIC) variable called "movieState" that is bound to a cell that contains an ampersand-delimited list of all variables defined in step one. For example, the Drilldown Chart example also includes a radio button control that can either be "yes" or "no" at any given point in time, whose corresponding Flash Variable is called "selectedRadioButton." In order to persist both the drop-down and radio button controls properly, the "movieState" EIC variable is bound to a cell that contains a string that looks like this:</p> <pre>selectedGroupBy=Vintage&selectedRadioButton=yes</pre> <p>The Xcelsius developer is responsible for setting up both sets of connections properly and binding them to appropriate cells in the spreadsheet that is leveraged by the visualization.</p>
Bookmark	None	Nothing about the Bookmarks component itself is stateful.
Breadcrumbs	Expanded multi-select dimensions	When multi-select dimension values are present in the Breadcrumbs component, they may be grouped into a collapse/expand control (depending on the number of values and the threshold set in the component's preferences). The state of each multi-select dimension's collapse/expand control is stateful and will be stored in a bookmark. For example, if you select Flavors of "Apple", "Berry" and "Cherry" in the sample wine data set, the collapse/expand control appears and is collapsed by default. If you expand it and then create a bookmark, the control will be expanded when that bookmark is loaded.
Chart	Metric, x-axis, and cross tab drop-down lists	When configuring a chart, the power user can define multiple metrics, x-axis, and cross tab groupings. When the chart is configured in this way, drop-down lists are provided for each. The user's selection for the Metric , Group By (X-Axis) , and Cross Tab drop-down lists are persisted with a bookmark.
Compare	<p>Attributes: persists the order of attributes and the expand and collapse state of attribute sets,</p> <p>Records: persists the order of records and their highlighted state</p>	
Find Similar	None	

Component	Persisted States	Comments
Guided Navigation	Expanded dimensions and collapsed dimension groups	Any dimension that is expanded so that its refinements are exposed is persisted in a bookmark, so that it will still be expanded when the bookmark is loaded. Dimension groups are, by default, expanded. If you collapse a dimension group, this is persisted in a bookmark, so that it will be collapsed when the bookmark is loaded.
Metrics Bar	None	
Range Filter	None	
Record Details	None	
Results Table	Sort state and number of records per page	If you have sorted on a column and create a bookmark, the sort will be applied when the bookmark is loaded. If you have selected a certain number of records per page and create a bookmark, the results table will display that number of records per page when you load the bookmark.
Results Table (BETA Enhancements)	The selected column set state	
Search Box	None	
Tabbed Component Container	The tab in focus	If you create a bookmark when on a tab other than the first one, that tab will be reloaded properly when the bookmark is loaded.
Tag Cloud	None	

Configuring Bookmarks

The power user can set the following preferences for the **Bookmarks** component.

The power user can select a display mode for the **Bookmarks** component. This controls the end user's view.



The power user can choose from three options:

- **Display Bookmark Controls**, which allows the end user to create new bookmarks, but does not display the entire list of saved bookmarks.
- **Display Bookmark Lists**, which displays the list of existing bookmarks.
- **Display Bookmark Controls and Lists**, which displays both. This is the default.

Data visualization components

The components in this section provide a more detailed view of your data.

Related Links

[Advanced Visualization](#) on page 44

The **Advanced Visualization** component provides SAP Crystal Dashboard Design (Xcelsius) visualizations within your application.

[Chart](#) on page 46

The **Chart** component lets you access Corda-based Analytics charting of your data.

[Cross Tab](#) on page 60

The **Cross Tab** component provides a table that allows end users to perform comparisons and identify trends across several cross sections of data.

[Results Table](#) on page 69

The **Results Table** component provides a simple interface for displaying results. The **Results Table** component can show results from Analytics and non-Analytics queries.

[Metrics Bar](#) on page 65

The **Metrics Bar** component allows users to quickly view metrics that summarize various aspects of the underlying data.

Advanced Visualization

The **Advanced Visualization** component provides SAP Crystal Dashboard Design (Xcelsius) visualizations within your application.

This integration provides Discovery Framework end users with dynamic insight into MDEX Engine powered data.

The **Advanced Visualization** component ships with three sample Flash movies in SWF format and the associated source files in XLF format.

Dependencies

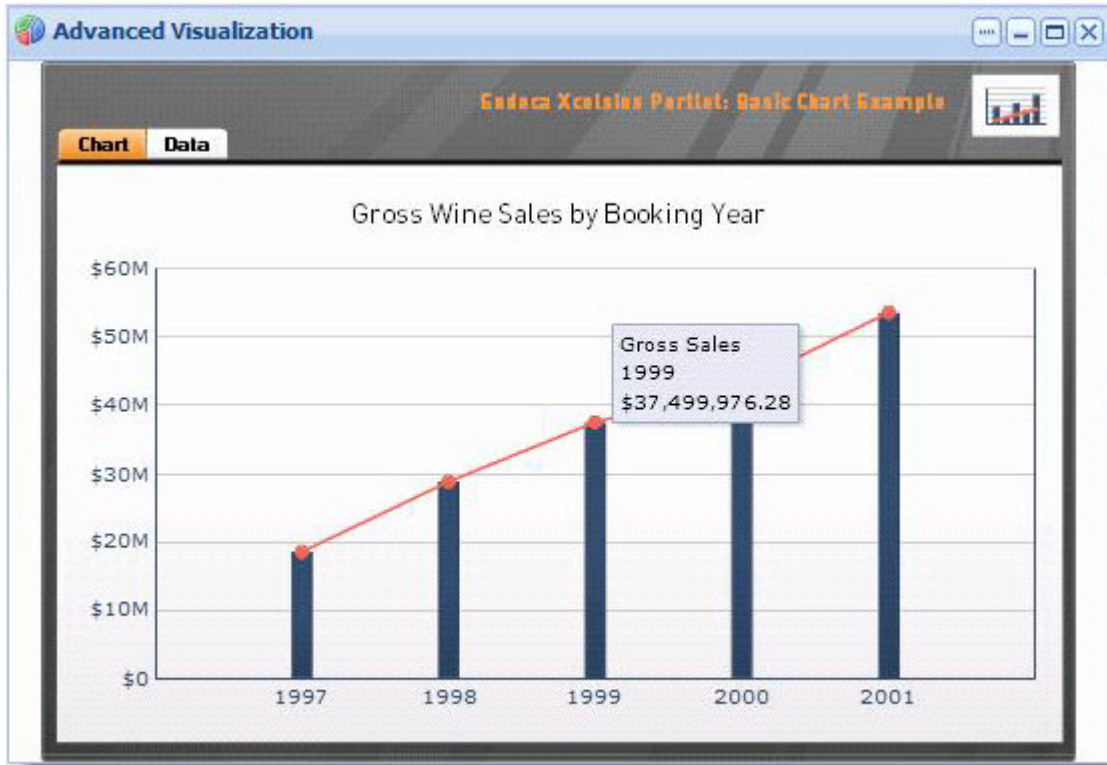
The **Advanced Visualization** component has the following dependencies:

- In order to use this component, you must purchase a license for SAP Crystal Dashboard Design 3.1. Once you have done so, you can download the software, along with a temporary license, from the Discovery Framework downloads page on [EDeN](#). To obtain a permanent license, contact Endeca Support.
- An experienced SAP Crystal Dashboard Design developer needs to create the Flash movies associated with your data. Once he or she has done so, it is easy to add the new movies to the Discovery Framework.
- This component requires the use of Endeca Analytics.

Using Advanced Visualization

This topic describes how an end user can use the **Advanced Visualization** component.

The **Advanced Visualization** component provides SAP Crystal Dashboard Design interactive data visualization of your Discovery Framework data. Many different chart styles are available to your SAP Crystal Dashboard Design developer.



You can mouse over elements of the chart to see the related data. In addition, you can click the **Data** tab to see the underlying data and its state.

The screenshot shows the same 'Advanced Visualization' window, but with the 'Data' tab selected. The 'Chart' tab is now inactive. The 'Raw Data' section displays a table with the following data:

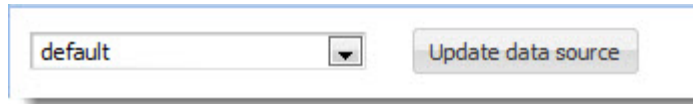
Booking Year	Gross (\$)
1997	\$18,568,161.04
1998	\$28,812,393.85
1999	\$37,499,976.28
2000	\$43,000,000.00
2001	\$53,519,333.05

Below the table is a section titled 'Data Source State' which is currently empty.

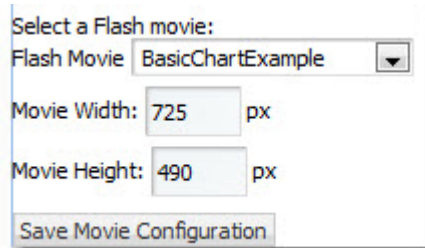
Configuring Advanced Visualization

The power user can set the following preferences for the **Advanced Visualization** component.

- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.



- **Flash movie settings:** Choose from the available SAP Crystal Dashboard Design movies and set the component size.



- **Reload movies:** Load all of the available movies for the selected data source. A power user can add movies to the Discovery Framework and click **Reload movies** to recognize the newly-added movies.

[Reload movies](#)



Note: SAP Crystal Dashboard Design movies must be supplied by an SAP Crystal Dashboard Design developer.

Chart

The **Chart** component lets you access Corda-based Analytics charting of your data.

The end user can mouse over the chart to reveal numeric data, and click on a chart element to filter results by the values displayed in the chart. In addition, the **Chart** component can be configured so that end users can switch the chart view by selecting drop-down choices. For example, an end user may switch the Metric or Group By that is summarized in the chart.

Dependencies

The **Chart** component has the following dependencies:

- In order to use this component, you must install Corda. For details, see the *Discovery Framework Installation Guide*.
- This component requires the use of Endeca Analytics.

Analytics statements supported in the Chart component

This topic describes the three types of Analytics statements that can be expressed in the **Chart** component.

The Analytics use cases are:

- **Zero GROUP BY statements, with one or more metrics** One or more metrics summarized by a single unspecified grouping (the name of which defaults to "Total").
- **One GROUP BY statement, with one or more metrics** One or more metrics summarized by a single specified categorization.
- **Two GROUP BY statement, with one metric** One metric summarized by a specified categorization, with a second GROUP BY statement specified as the *cross tab*. (Cross tabs are grouped aggregations such as cross-tabulated totals over one or more dimensions.)

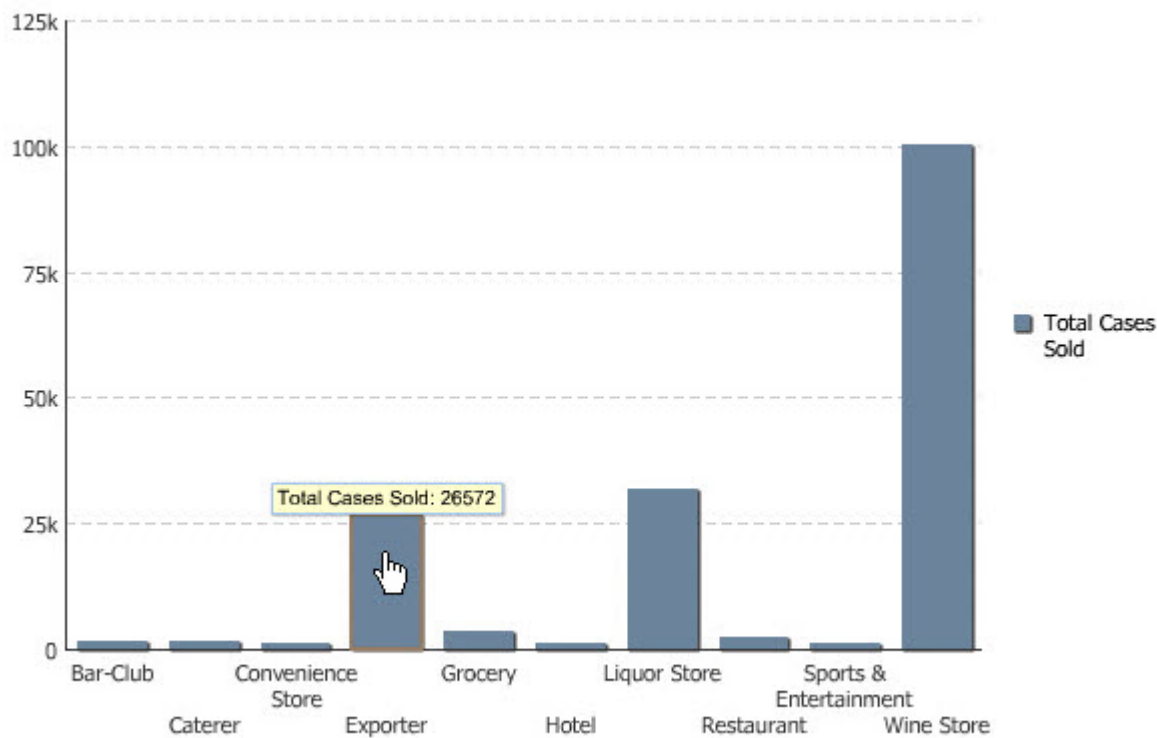
Various expressions of these types are shown in the chart style examples later in this section.

Using Chart

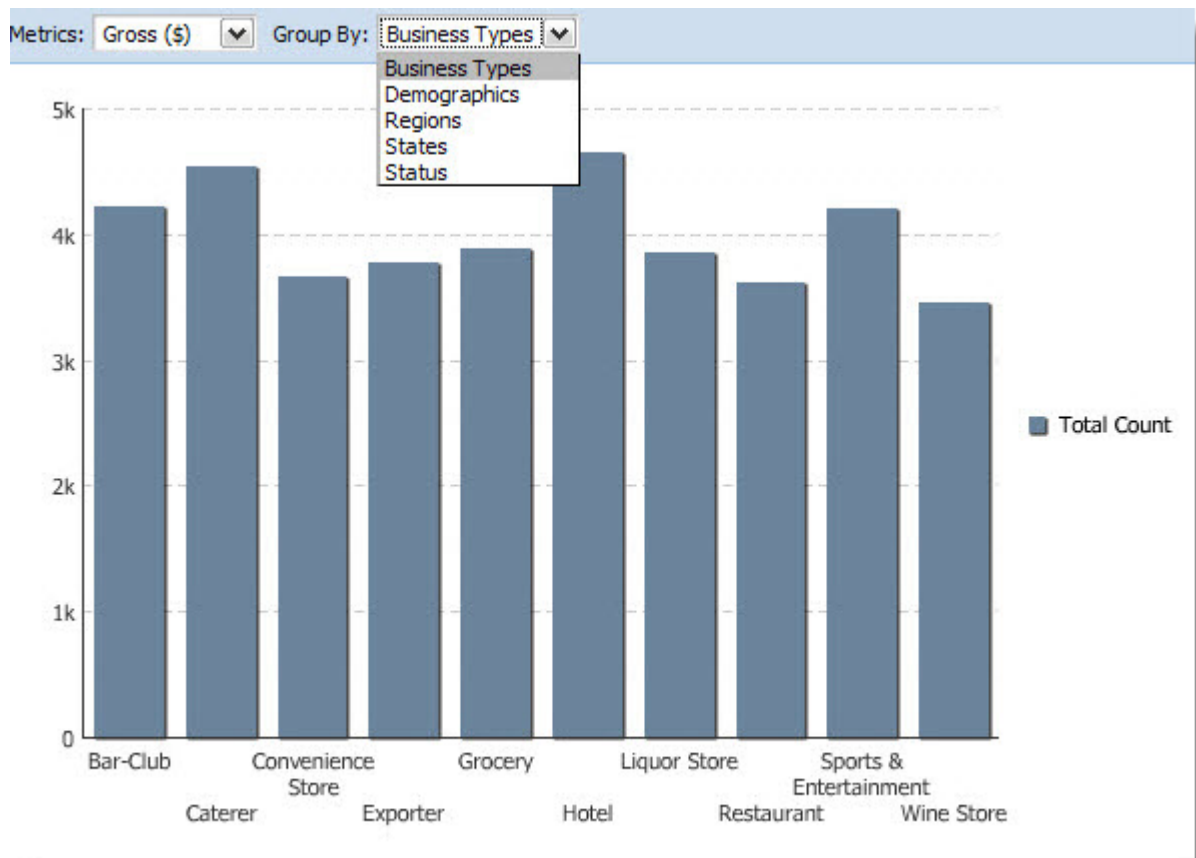
This topic describes how an end user can use the **Chart** component.

The power user who configures your Analytics statements can provide you with two kinds of charts: fixed and parametric. Examples of each are shown below.

The following chart is based on a fixed Analytics statement. You can mouse over chart elements to see the related data, or click to drill down. Drill down is supported for dimension GROUP BY statements but not for property GROUP BY statements.



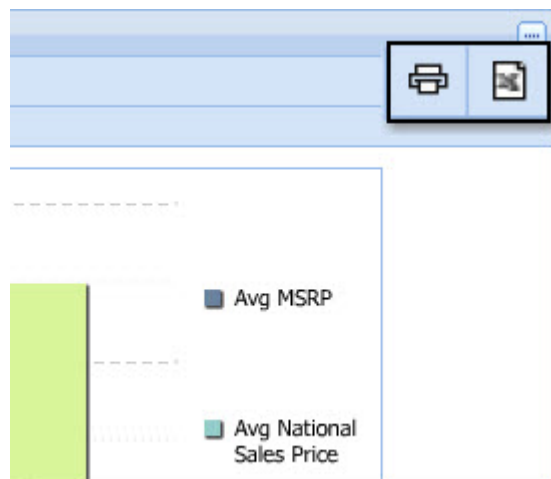
The following chart is based on a parametric Analytics statement. You can modify the chart display by selecting different values from the drop-down lists at the top of the chart.



In addition, the power user has the ability to configure multiple charts, based on different Analytics statements and chart styles, that you can select from a drop down list.

Printing and exporting

End users also have the ability to print and/or export the chart they have created. The end user accesses these features with the **Print** and **Export** buttons, shown below.



When the user selects **Print**, the chart displays in another browser window. The user prints as normal via the **File** menu or keyboard shortcut.

Export allows the user to export the chart to Excel.

Configuring Chart

The power user can set the following preferences for the **Chart** component.

The power user can add a fixed Analytics statement to the **Chart** component, or configure a parametric Analytics statement that allows end users to see drop-down lists across the top of the chart.



Note: Unlike most components, the **Chart** component includes online help. This help, which mostly provides tips on working with Analytics statements, can be accessed from the same menu that contains the **Preferences** option. For more detailed information on the Endeca Analytics language, see the *Endeca Analytics Guide*.

The screenshot shows the 'Chart Options' configuration window. At the top, there are input fields for 'Chart Height' (300), 'Chart Width' (600), 'Chart Select Label' (Select Chart), 'HTML Height' (300), 'HTML Width' (600), and 'Analytics Threshold' (1000000). Below these is a text field for 'Analytics Threshold Exceeded Message' with the value 'Too many results to display. Filter results further to view chart'. The main section is titled 'Yearly Averages' and contains a 'Chart Title' field with 'Yearly Averages' and a 'Style' dropdown menu set to 'Vertical Bar'. Below this is a text area for an analytics statement: 'RETURN YearlyAverages AS SELECT AVG("Product MSRP (\$)") AS "Avg MSRP", AVG("Product Avg National Sales Price (\$)") AS "Avg National Sales Price"'. To the right of this text area is a 'Test analytics query...' button. Below the text area is a paragraph of help text: 'Please see the help page for instructions on writing the statement. For example: RETURN "MyChart" as SELECT AVG({METRIC}) as {METRIC} GROUP BY {XAXIS}, {CROSSTAB} (values for {METRIC}, {XAXIS} and {CROSSTAB} are filled in from the Metric, X Axis and Cross tab options below)'. Below the help text are three columns: 'Metric Options (one per line):', 'X Axis Options (one per line):', and 'Cross tab (one per line):', each with a large empty text area. Below these columns is a paragraph of explanatory text: 'Values in these fields are presented to the user in drop-down menus. Metric options are substituted for variable {METRIC} in the analytics statement, X Axis options for variable {XAXIS}, and Cross tab options for variable {CROSSTAB}. If these variables are not used in the statement, the drop-down menu(s) will have no effect.' At the bottom left is a 'Metric Selector' section with three checkboxes: 'Avg MSRP' (unchecked), 'Avg National Sales Price' (checked), and 'Avg Sales Price' (checked). At the bottom right is a 'Save Preferences' button.

- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.

- **Chart options:** Define the height and width of the chart and set a name for the control that allows end users to choose from multiple charts when available. In addition, set a threshold for the number of Analytics results the query returns, and create a message to display if the query results exceed that threshold.

- **Chart Title and Style:** Name the chart and select the type of chart to display. The **Chart** component supports the following chart styles: Vertical Bar, Stacked Vertical Bar, Horizontal Bar, Line, Pie, and Line Bar Combo.

- **Chart configuration tabs:** Click the + to add additional chart tabs. You can configure a different chart on each tab for your end users.

- **Analytics Statement:** Type your Analytics statement here. Note that labels can be configured for metrics only, using the AS functionality in an Analytics statement. After the Analytics statement has been entered, use the **Test analytics query** button to test the validity of the statement before saving preferences.

- **Metric Options, X Axis Options, and Cross tab:** For parametric Analytics charts, provide options for the drop-down lists your end users will access. Cross tabs are grouped aggregations such as cross-tabulated totals over one or more dimensions.

- **Metric Selector:** Allows you to specify an ORDER BY in the Analytics statement without including it in the display. In the example below, if you did not want to include the statement's ORDER BY "Avg Sales Price" metric in the chart, you would un-check that metric in the list. Note that the **Metric Selector** does not appear until you have tested and saved the Analytics query.

Metric Selector

- ☒ Avg MSRP
- ☒ Avg National Sales Price
- ☒ Avg Sales Price

- **Enable Top-N Sort** and **Enable end user control:** When the **Enable Top-N sort** box is checked, the chart's results can be sorted in ascending or descending order. If the **Enable end user control** box is also checked, the end user can toggle the sort order.

Enable Top-N Sort: ☒

Show Top 10 by Avg National Sales Price

Enable end user control ☒

Chart styles provided by the Chart component

The following chart styles are supported by the **Chart** component.

- Vertical Bar
- Stacked Vertical Bar
- Horizontal Bar
- Line
- Pie
- Line Bar Combo

Examples of each of these chart styles appears in the following topics.

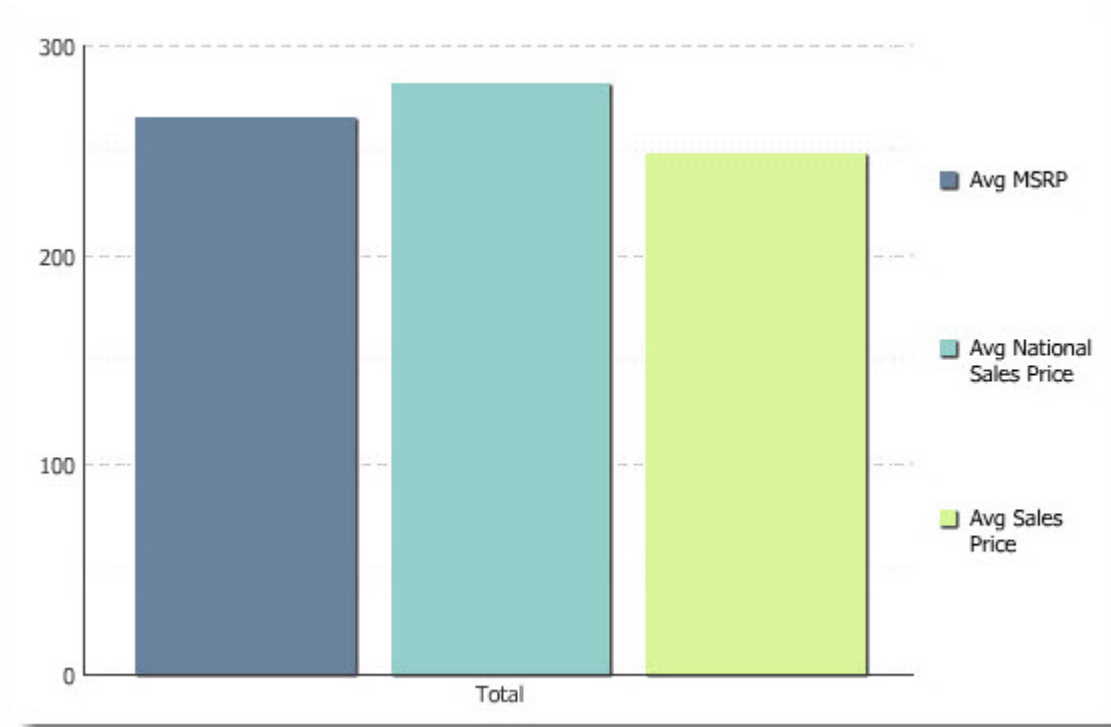
Vertical bar chart

This topic contains an example of a vertical bar chart.

The following example uses a zero GROUP BY statement with three metrics:

```
RETURN YearlyAverages AS SELECT
  AVG("Product MSRP ($)") AS "Avg MSRP",
  AVG("Product Avg National Sales Price ($)") AS "Avg National Sales
Price",
  AVG("Unit Sale Price ($)") AS "Avg Sales Price"
GROUP
```

It produces a vertical bar chart displaying "Avg MSRP", "Avg National Sales Price" and "Avg Sales Price" metrics:



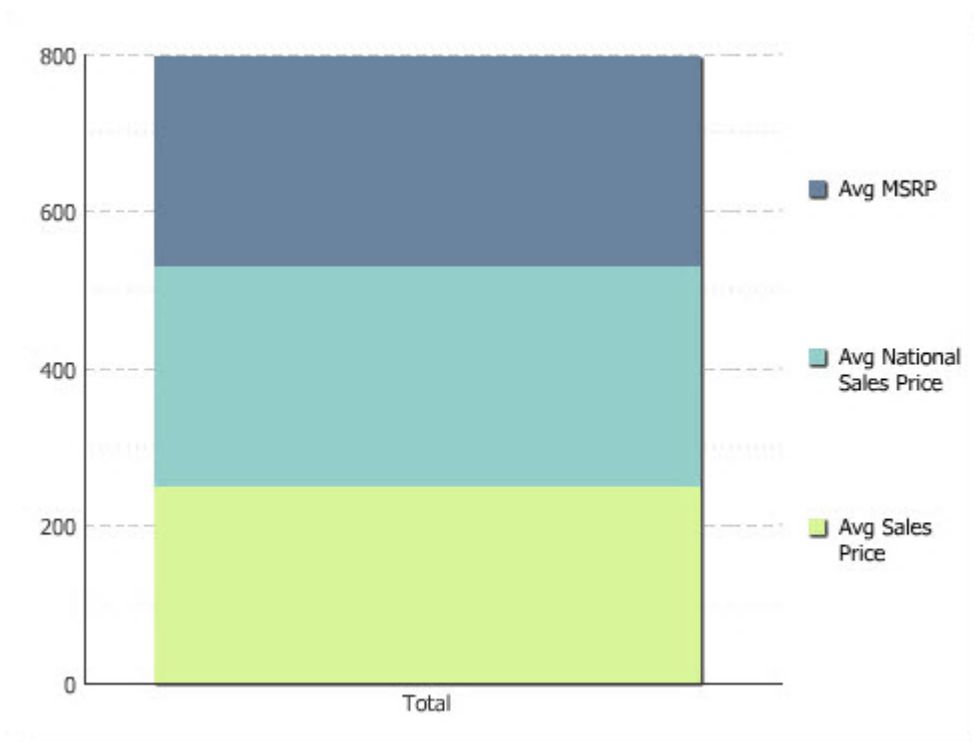
Stacked vertical bar chart

This topic contains an example of a stacked vertical bar chart.

This example uses an Analytics statement with two GROUP BY statements. One metric is summarized by a specified categorization, and the second GROUP BY is specified as the cross tab.

```
RETURN RegionalMargin AS SELECT
  SUM("Gross ($)" * "Margin (%)") / SUM("Gross ($)") AS "DollarWeightedAvgMargin"
GROUP BY "Regions", "Demographics"
```

The stacked vertical bar chart below summarizes the “DollarWeightedAvgMargin” metric for each Region (which is the first GROUP BY and therefore the primary category) and presents a cross-tabulation with each Demographic (which is the second GROUP BY and therefore the cross tab):



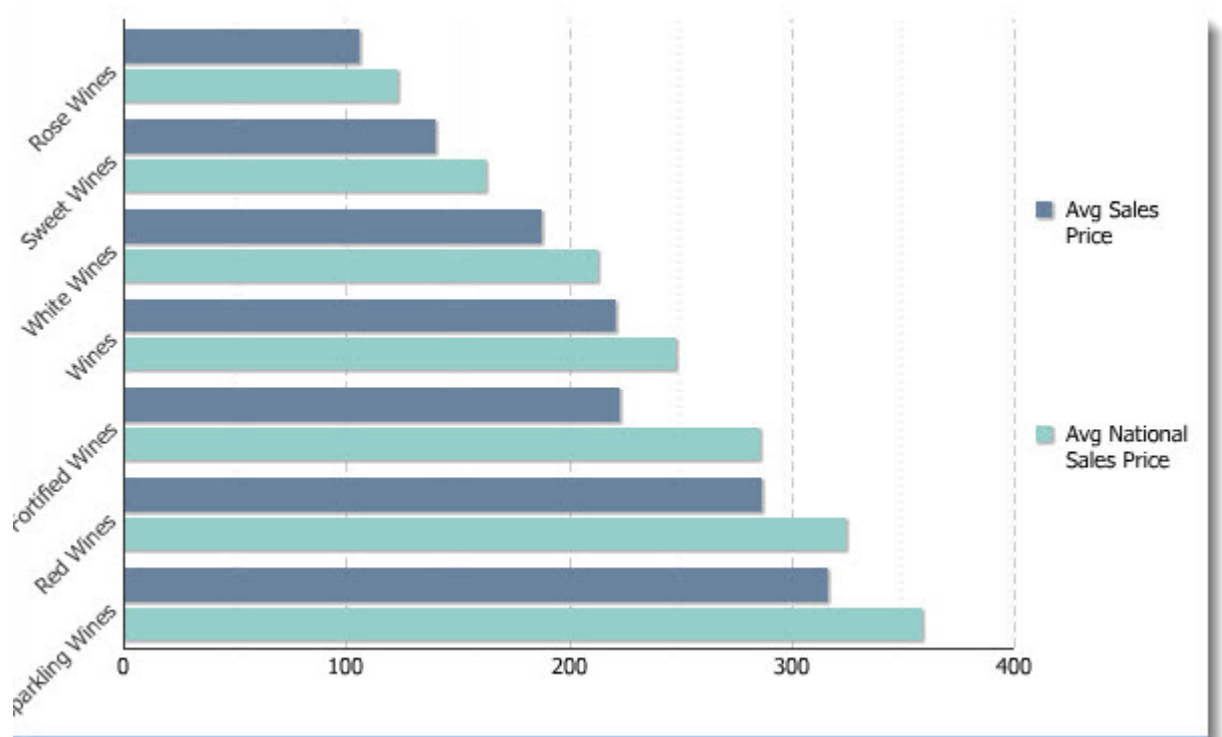
Horizontal bar chart

This topic contains an example of a horizontal bar chart.

This example uses a single GROUP BY statement with two metrics:

```
RETURN NumCases AS SELECT
  AVG("Unit Sale Price ($)") AS "Avg Sales Price",
  AVG("Product Avg National Sales Price ($)") AS "Avg National Sales
Price"
GROUP BY "Varietals" ORDER BY "Avg National Sales Price"
```

The horizontal bar chart compares the "Avg Sales Price" metric to the "Avg National Sales Price" for each varietal:



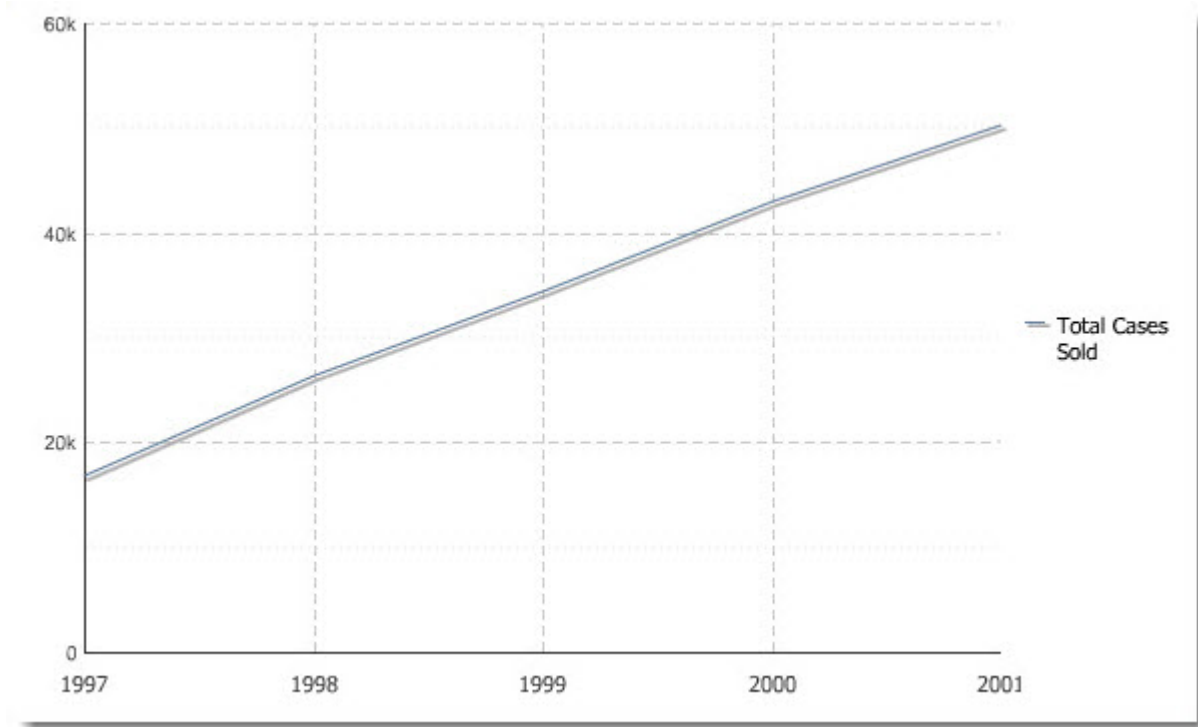
Line chart

This topic contains an example of a line chart.

The following Analytics statement has one GROUP BY and a single metric:

```
RETURN NumCases AS SELECT
  SUM("Number of Cases Sold") AS "Total Cases Sold"
GROUP BY "Booking Year"
```

It produces a line chart summarizing the "Total Cases Sold" metric for each Booking Year:



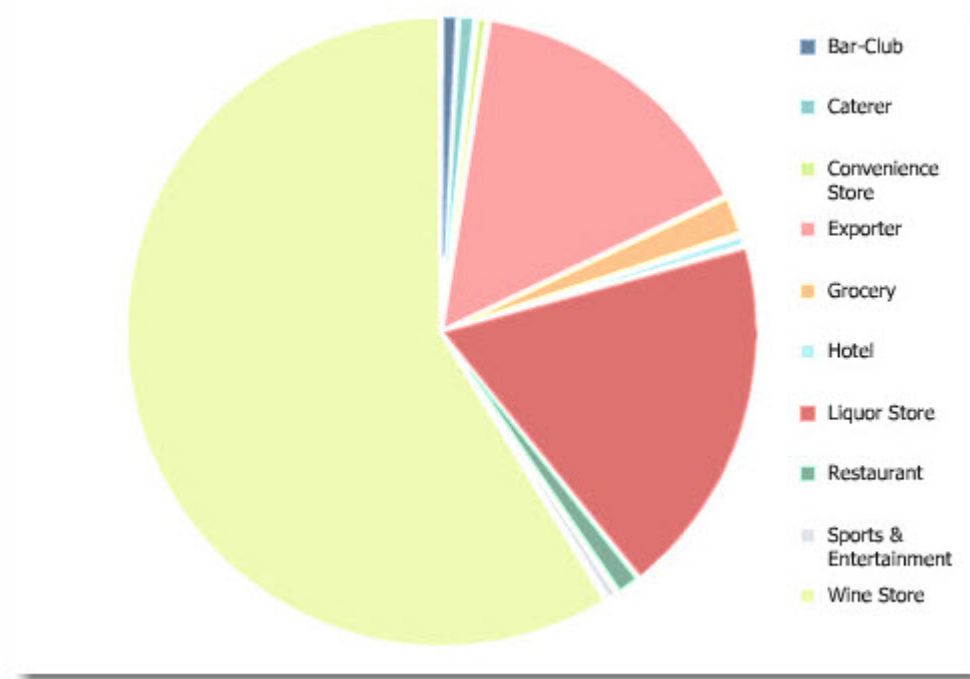
Pie chart

This topic contains an example of the pie chart type.

The following Analytics statement contains one GROUP BY and a single metric:

```
RETURN NumCases AS SELECT  
    SUM("Number of Cases Sold") AS "Total Cases Sold"  
GROUP BY "Business Types"
```

It produces a pie chart summarizing the "Total Cases Sold" metric for each Business Type:



Important: The pie chart type only supports a single GROUP BY statement. If you have multiple GROUP BYs in your statements, the chart will not display or execute drill-down as expected.

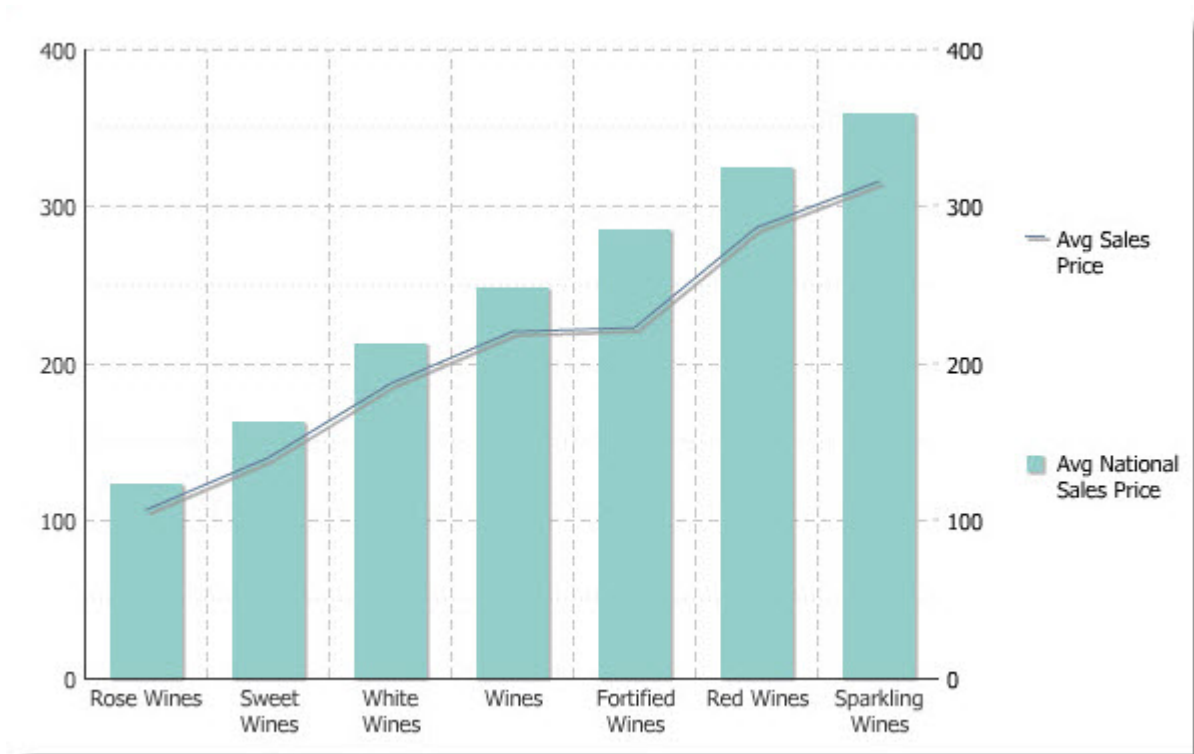
Line bar combo chart

This topic contains an example of a line bar combo chart.

The following example contains one GROUP BY statement and two metrics:

```
RETURN NumCases AS SELECT
  AVG("Unit Sale Price ($)") AS "Avg Sales Price",
  AVG("Product Avg National Sales Price ($)") AS "Avg National Sales
Price"
GROUP BY "Varietals" ORDER BY "Avg National Sales Price"
```

It produces a line bar combo chart comparing the "Avg Sales Price" metric to the "Avg National Sales Price" for each varietal:



Compare

The **Compare** component allows end users to view two or more records side-by-side in order to analyze differences and similarities between them.

The details are presented in a tabular format for easy comparison.

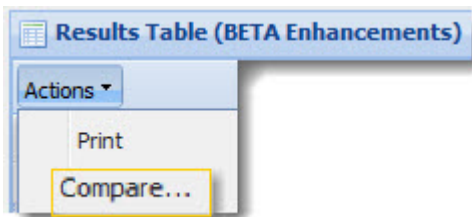


Note: The **Compare** component is accessed from either the **Results Table** component or the **Results Table (BETA Enhancements)** component.

Using Compare

This topic describes how an end user can use the **Compare** component.

In either the **Results Table** component or the **Results Table (BETA Enhancements)** component, the end user can select two or more records to compare.



Within the **Compare** component, the end user can view and compare details for the selected records.

	Record1	Record2	Record3	Record4	Record5
Ratings (2 attributes)					
Price Range	\$10 to \$20	\$20 to \$30	Under \$10	\$30 to \$40	\$10 to \$20
Review Score	20 to 30	30 to 40	80 to 90	80 to 90	70 to 80
Characteristics (3 attributes)					
Body	Crisp	Ripe	Rich, Smooth	Tight	Fresh, Soft
Flavors	Apple, Dry, Fruit,...	Citrus, Fig, Honey, ...	Apple	Apple, Fruit, Grape,...	Earthy, Melon
Drinkability	Drink now	Drink now			
Other (18 attributes)					
P_Winery	Adegas Morgadio	Hidden Cellars	Hugel	Jaffelin	Parxet
P_Price	18.000000	20.000000	9.000000	34.000000	11.000000
P_Name	Albarino Rias Bai...	Alchemy Mendocino ...	Alsace Gentil	Meursault Les Cras	Alella Marques de Al
P_DateReviewed	06/15/93	02/28/95	11/15/94	08/31/94	04/15/94
Wine Type	White	White	White	White	White
Winery	Adegas Morgadio	Hidden Cellars	Hugel	Jaffelin	Parxet
ADG Refinement Center	White	Ripe, White	White	White	Soft, White
P_Description	Dry, tart and cris...				

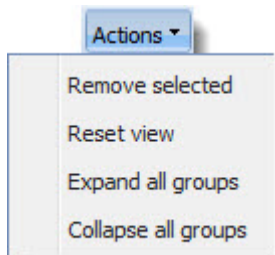
Comparing 4 record(s) to baseline Record1 | 0 Record(s) Currently Selected

The end user can set one record as the baseline by clicking . This locks the record's column so that several alternate records can be compared against it. Non-baseline records can be dragged left or right in the display, allowing direct, side-by-side comparison of any two records.

The end user can also drill down to details about any record by clicking . This action launches the **Record Details** component for that record.

In addition, the end user can drag and drop attribute sets to move them up or down in the display, enabling direct, side-by-side comparison of attributes in the sets. Attributes can also be reordered within their sets (though they cannot be dragged to other sets).

From the **Actions** menu, the end user can remove a selected record, reset the view to the default, or expand or collapse attribute groups.



With the **Highlight Differences** setting, the end user has control over highlighting in the display. The end user can choose to highlight all differences between records, or may choose a baseline record against which differences are calculated and highlighted, as shown in the image below:


P_DateReviewed	06/15/93	02/28/95	11/15/94	08/31/94	04/15/94
Wine Type	White	White	White	White	White
Winery	Adegas Morgadio	Hidden Cellars	Hugel	Jaffelin	Parxet
ADG Refinement Center	White	Ripe, White	White	White	Soft, White

Configuring Compare

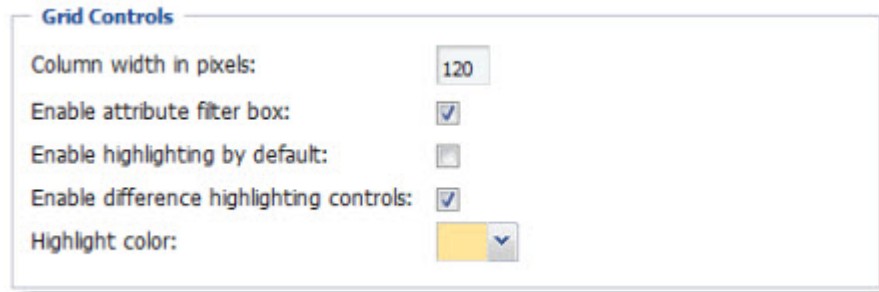
The power user can set the following preferences for the **Compare** component.

- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.

- **Configure Attribute List:** Select the attributes to displayed to the end user. The power user can check and uncheck attributes and attribute sets directly.

Clicking the pencil icon  for any attribute opens the **Edit Attribute Display** dialog box, where you can set the formatting for that attribute.

- **Grid Controls:** Set the appearance and behavior of the table the end user sees.



Grid Controls

Column width in pixels:

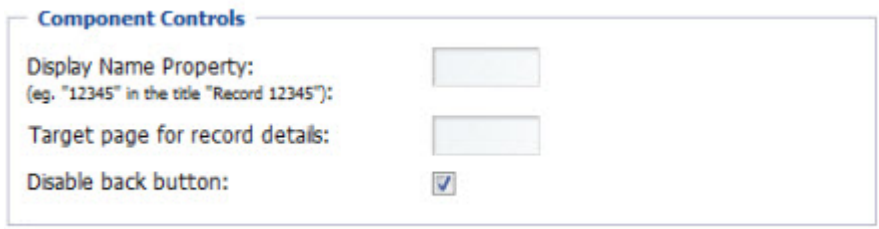
Enable attribute filter box: ☒

Enable highlighting by default: ☐

Enable difference highlighting controls: ☒

Highlight color:

- **Column width in pixels:** This column width applies to all record columns.
 - **Enable attribute filter box:** Enabled by default. Disabling this setting causes the filter and search box to disappear from the end user view.
 - **Enabling highlighting by default:** Disabled by default. Enabling this setting causes the **Compare** component to highlight differences between records when they are first loaded. Since no record is in the “baseline” position when records are first loaded, the highlight is in “highlight with no baseline record” mode.
 - **Enable difference highlighting controls:** Enabled by default. Disabling this setting causes the **Highlight differences** button to disappear from the end user view.
 - **Highlight color:** Changes the color used for the highlighting feature.
- **Component Controls:**



Component Controls

Display Name Property:
(eg. "12345" in the title "Record 12345"):

Target page for record details:

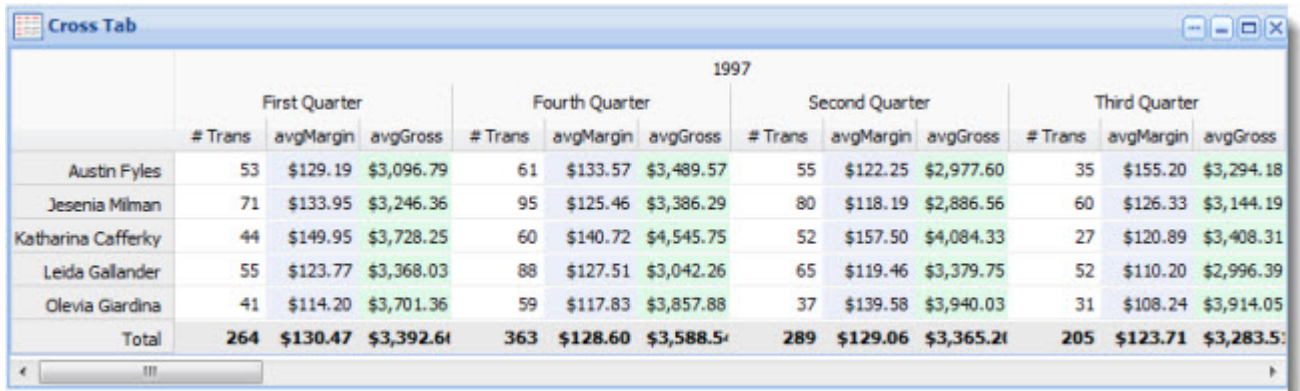
Disable back button: ☒

- **Display name property:** Set the property to be used as the display name in the end user's view of the record.
- **Target page for record details:** Specify a separate page to display record details.
- **Disable back button:** Hide the **Back** button from the end user view.

Cross Tab

The **Cross Tab** component provides a table that allows end users to perform comparisons and identify trends across several cross sections of data.

A cross tab consists of a specific configuration of rows, columns, and summary cells that together make up the table body. The values displayed in the header rows and columns represent every possible grouping value of the specified data fields. Summary cells exist at the intersection of rows and columns. The value of a given summary cell is a metric corresponding to the intersection of those two groupings.



	1997											
	First Quarter			Fourth Quarter			Second Quarter			Third Quarter		
	# Trans	avgMargin	avgGross	# Trans	avgMargin	avgGross	# Trans	avgMargin	avgGross	# Trans	avgMargin	avgGross
Austin Fyles	53	\$129.19	\$3,096.79	61	\$133.57	\$3,489.57	55	\$122.25	\$2,977.60	35	\$155.20	\$3,294.18
Jesenia Milman	71	\$133.95	\$3,246.36	95	\$125.46	\$3,386.29	80	\$118.19	\$2,886.56	60	\$126.33	\$3,144.19
Katharina Cafferky	44	\$149.95	\$3,728.25	60	\$140.72	\$4,545.75	52	\$157.50	\$4,084.33	27	\$120.89	\$3,408.31
Leida Gallander	55	\$123.77	\$3,368.03	88	\$127.51	\$3,042.26	65	\$119.46	\$3,379.75	52	\$110.20	\$2,996.39
Olevia Giardina	41	\$114.20	\$3,701.36	59	\$117.83	\$3,857.88	37	\$139.58	\$3,940.03	31	\$108.24	\$3,914.05
Total	264	\$130.47	\$3,392.61	363	\$128.60	\$3,588.54	289	\$129.06	\$3,365.21	205	\$123.71	\$3,283.51



Note: This component requires the use of Endeca Analytics.

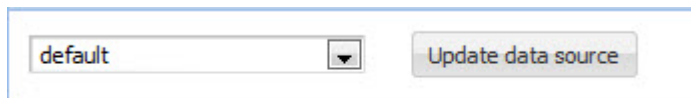
Using Cross Tab

The end user views the cross tab result table, but cannot edit or modify it.

Configuring Cross Tab

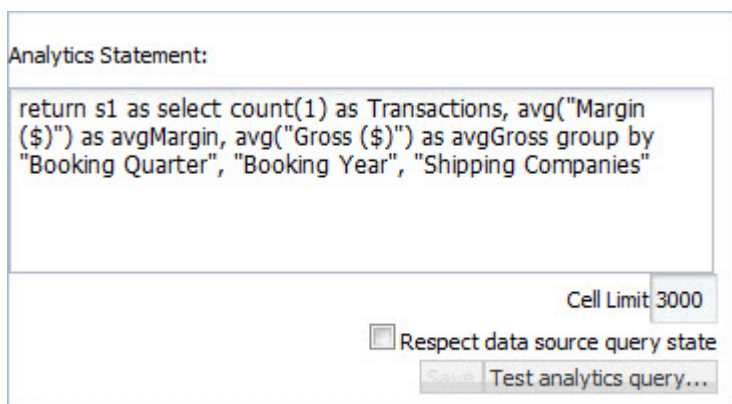
The power user can set the following preferences for the **Cross Tab** component.

- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component. (If you are changing data sources, you must do so before entering your Analytics statement.)



default

- **Analytics Statement:** Enter an Analytics statement to return cross-tab values.



Analytics Statement:

```
return s1 as select count(1) as Transactions, avg("Margin ($)") as avgMargin, avg("Gross ($)") as avgGross group by "Booking Quarter", "Booking Year", "Shipping Companies"
```

Cell Limit 3000

☐ Respect data source query state



Note: Using fields with too many values in your GROUP BY clauses may cause your cross tab results table to become too large to be useful.

- **Cell Limit:** Set a threshold to prevent too large a grid from being rendered on the **Cross Tab** page. In general, you should not make this value, which represents the number of cells rendered in the cross tab results table, much larger than the default. A table with many thousands of cells is time-consuming to render and difficult for the end user to read.
- **Respect data source query state:** When this box is checked, the **Cross Tab** component is dependent on its data source query state, which means the metric values should update when the data source query state changes. When the box is unchecked, it is independent of the data source query state, so the metric values should remain constant regardless of the data source query state.

☒ Respect data source query state

- **Test analytics query:** Validate the Analytics statements before loading the metrics into the component. (This step is required.)

Test analytics query...

After you test and debug your Analytics query, click **Save**.

Save Test analytics query...

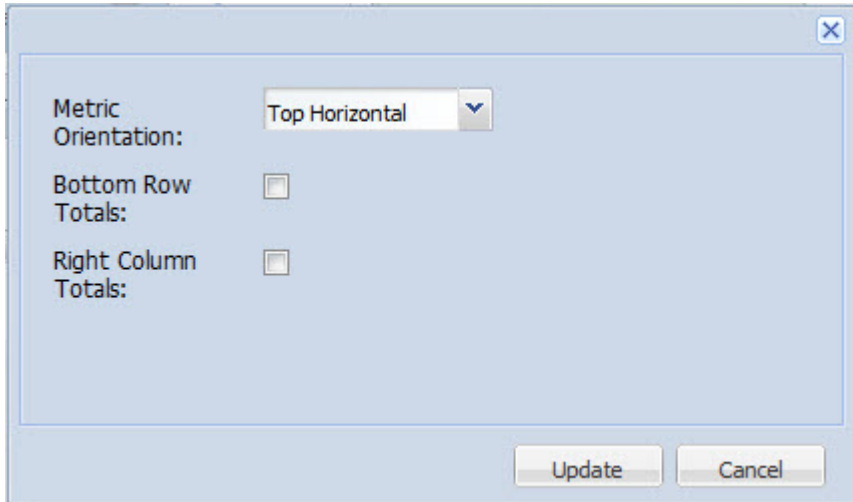
When you save, the **Configuration** section is populated with metric, row, and column information.

- **Configuration:** Adjust the table that your end users will see.

In the **Metrics** section, you can configure general metric options or an individual metric. Click the ... button in the top right corner of the panel to launch its formatting options, where you can change the axis on which metrics are displayed or add metric totals.



Note: Totals are computed using the same aggregating function as the original metric. For example, metrics computed using the average function (AVG) display an overall average for the Total. Because totals may be confusing in cases where the ARB function is used, you may not want to display totals in such cases.

A dialog box titled "Metric Orientation" with a close button (X) in the top right corner. It contains three settings: "Metric Orientation:" with a dropdown menu set to "Top Horizontal", "Bottom Row Totals:" with an unchecked checkbox, and "Right Column Totals:" with an unchecked checkbox. At the bottom are "Update" and "Cancel" buttons.

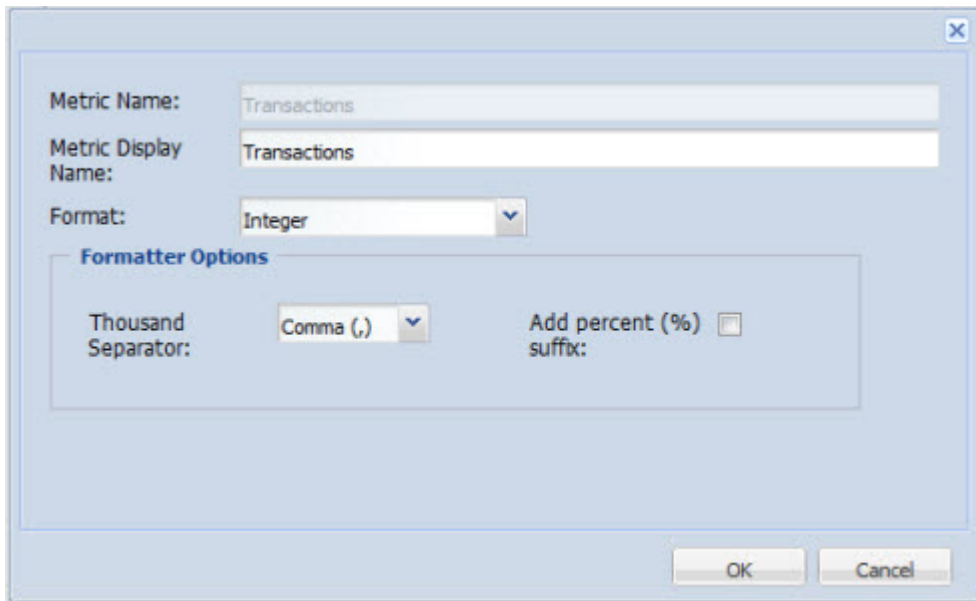
Metric Orientation: Top Horizontal

Bottom Row Totals: ☐

Right Column Totals: ☐

Update Cancel

For any individual metric, click the . . . button on its label to access formatting options, where you can change the display name and format the data.

A dialog box titled "Metric Formatting" with a close button (X) in the top right corner. It contains four settings: "Metric Name:" with a text field containing "Transactions", "Metric Display Name:" with a text field containing "Transactions", "Format:" with a dropdown menu set to "Integer", and a "Formatter Options" section. The "Formatter Options" section contains "Thousand Separator:" with a dropdown menu set to "Comma (,)" and "Add percent (%) suffix:" with an unchecked checkbox. At the bottom are "OK" and "Cancel" buttons.

Metric Name: Transactions

Metric Display Name: Transactions

Format: Integer

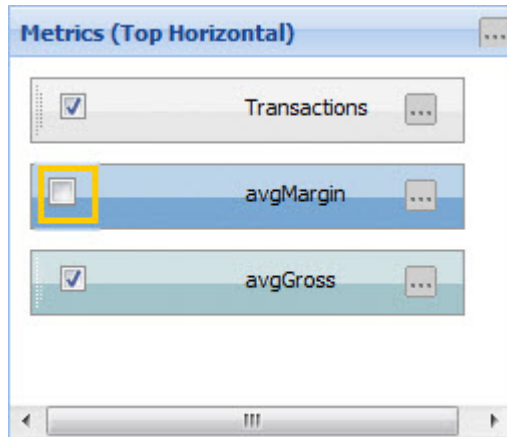
Formatter Options

Thousand Separator: Comma (,)

Add percent (%) suffix: ☐

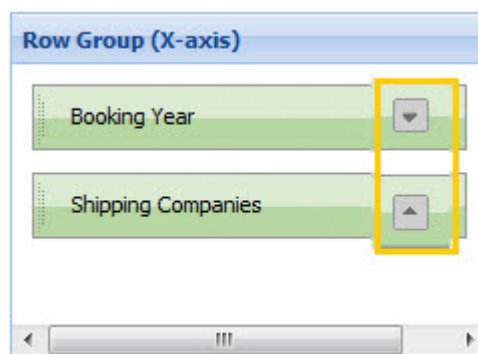
OK Cancel

You can drag metrics to reorder them, and remove a metric from the cross tab result table display by unchecking it.



Note: To improve performance, if you do not want to display a metric, it is better to remove it from the Analytics statement than it is to uncheck it.

In the **Row Group** and **Column Group** section, you can drag items anywhere in the row and column panels. Each GROUP BY item contains a toggle that can be used to set ascending or descending order.

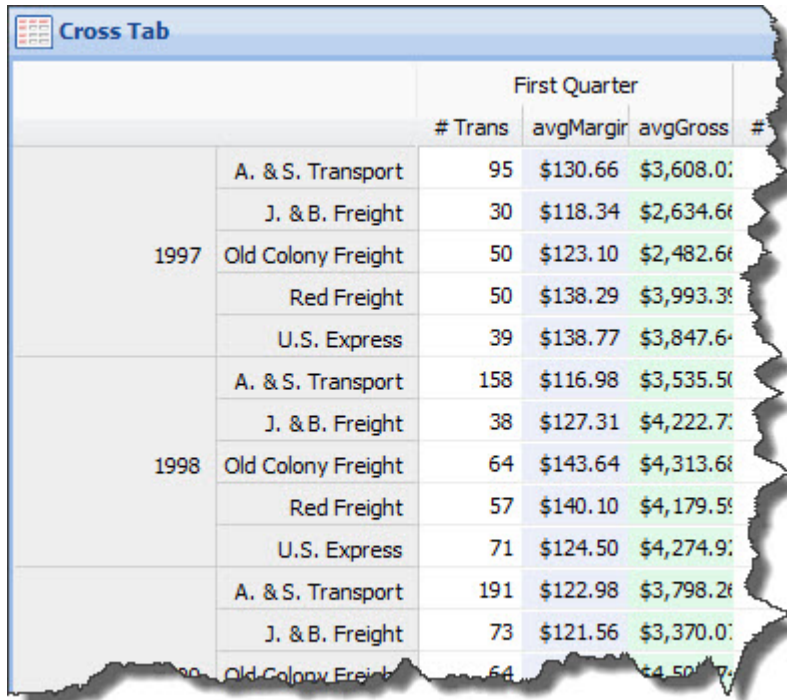


- **View Options:** Modify the dimensions (in pixels) of the table and its window.



Note: The initial generated table will be fit into the size of the component, regardless of how many rows or columns there are. You can use these controls to make the table larger than the component space and navigable with scroll bars.

- **Preview table:** Preview the cross tab display as it will appear to the end user.

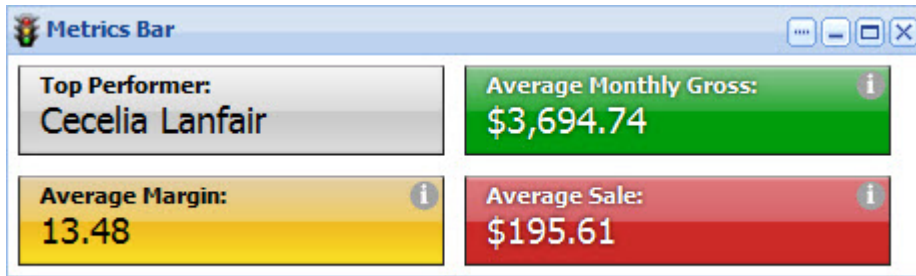


Cross Tab

		First Quarter			
		# Trans	avgMargin	avgGross	#
1997	A. & S. Transport	95	\$130.66	\$3,608.00	
	J. & B. Freight	30	\$118.34	\$2,634.60	
	Old Colony Freight	50	\$123.10	\$2,482.60	
	Red Freight	50	\$138.29	\$3,993.30	
	U.S. Express	39	\$138.77	\$3,847.60	
1998	A. & S. Transport	158	\$116.98	\$3,535.50	
	J. & B. Freight	38	\$127.31	\$4,222.70	
	Old Colony Freight	64	\$143.64	\$4,313.60	
	Red Freight	57	\$140.10	\$4,179.50	
	U.S. Express	71	\$124.50	\$4,274.90	
1999	A. & S. Transport	191	\$122.98	\$3,798.20	
	J. & B. Freight	73	\$121.56	\$3,370.00	
	Old Colony Freight	64	\$143.64	\$4,313.60	

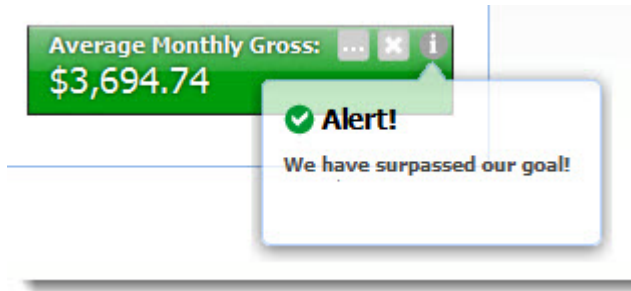
Metrics Bar

The **Metrics Bar** component allows users to quickly view metrics that summarize various aspects of the underlying data.



The **Metrics Bar** component displays metrics based on Analytics statements written by the power user.

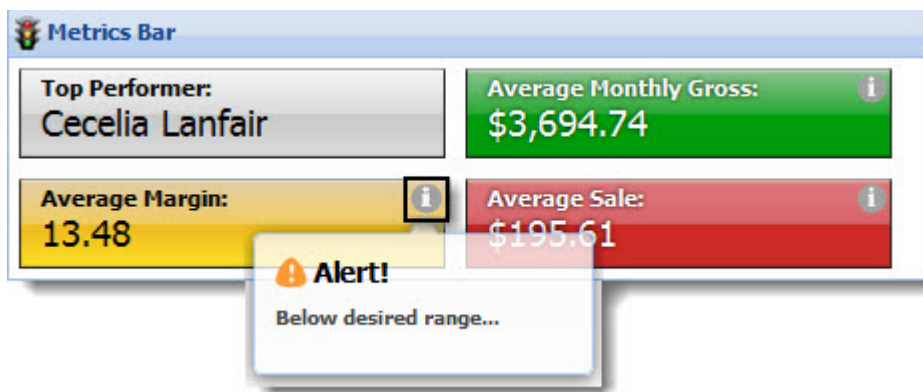
The power user is able to change the display format of the returned metric value. He or she can also set threshold violation indicators to alert the end users when a metric has reached a certain value or range of values (shown below):



Using Metrics Bar

This topic describes how an end user can use the **Metrics Bar** component.

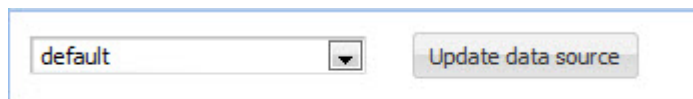
The following image shows a **Metrics Bar** component with four metric values on display. The end user can view the metric values and mouse over the **i** symbol (highlighted below) on each metric box to view any alerts or threshold violation indicators.



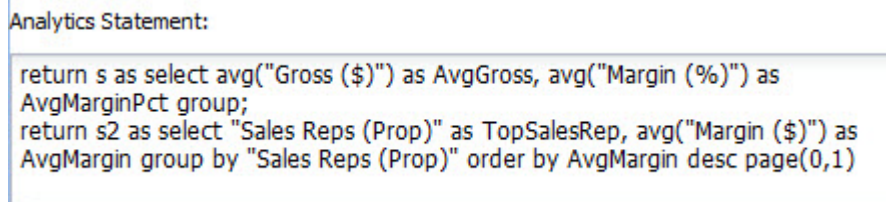
Configuring Metrics Bar

The power user can set the following preferences for the **Metrics Bar** component.

- **Update data source:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.



- **Analytics Statement:** Enter an Analytics statement (or multiple statements) to return metric values.



- **Respect data source query state:** When this box is checked, the **Metrics Bar** component is dependent on its data source query state, which means the metric values should update when the

data source query state changes. When the box is unchecked, it is independent of the data source query state, so the metric values should remain constant regardless of the data source query state.

☒ Respect data source query state

- **Test analytics query:** Validate the Analytics statements before loading the metrics into the component. The power user is required to test the Analytics statements before loading the statements into the component.

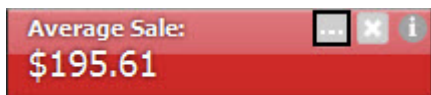
Test analytics query...

- **Load Metrics:** Save the Analytics statements and display the metric values.

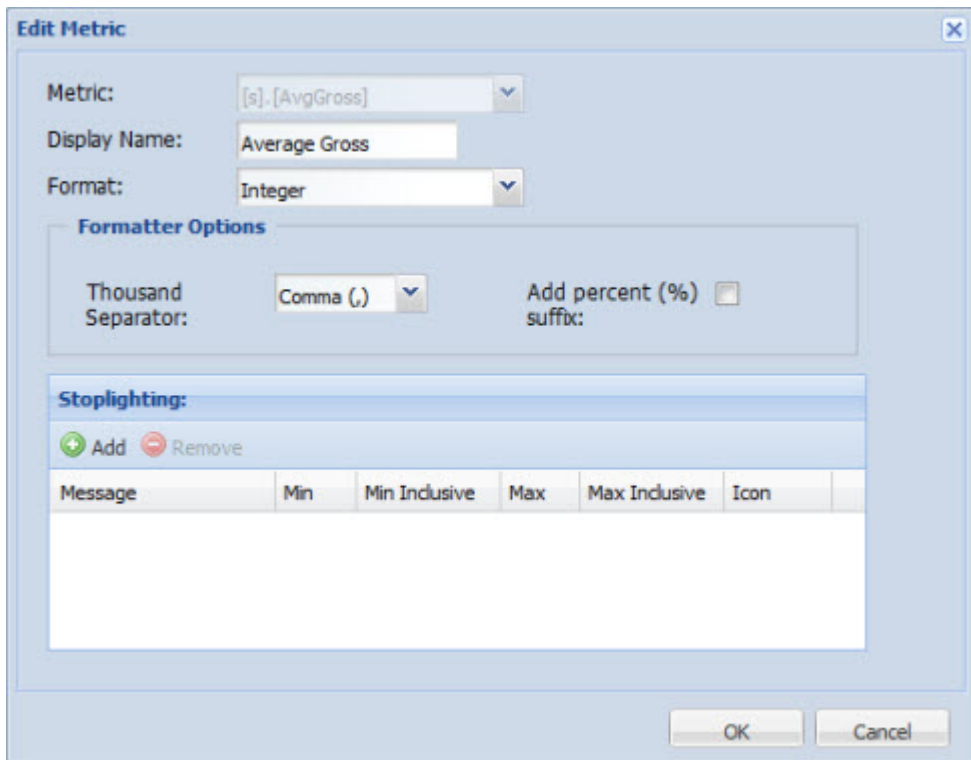
Load Metrics

Configuring the metric boxes

To access the **Edit Metric** dialog box for an individual metric box, click ... (highlighted below):



The power user can edit the following metric box preferences:



- **Edit Metric:** Select the metric to display (if applicable) and change the **Display Name** and **Format**. The **Metrics Bar** component supports decimal, currency, string, and integer formats.

Metric: [s].[AvgGross] ▼

Display Name: Average Monthly Gross

Format: Currency ▼

- **Formatter Options:** Customize the metric's format.



Note: The options displayed change depending on the selected format.

Formatter Options

Thousand Separator: Comma (,) ▼ Add percent (%) suffix: ☐

Decimal Separator: Period (.) ▼ Decimal Places: 2

- **Stoplighting:** Configure threshold violation indicators. The power user determines a range of values for the indicator, chooses an icon and color, and creates an alert message to display if the metric falls within the set range. The power user can set the **Min** and **Max** values for the range, and can also set whether those values are included in the range using **Min Inclusive** and **Max Inclusive**.

Stoplighting:

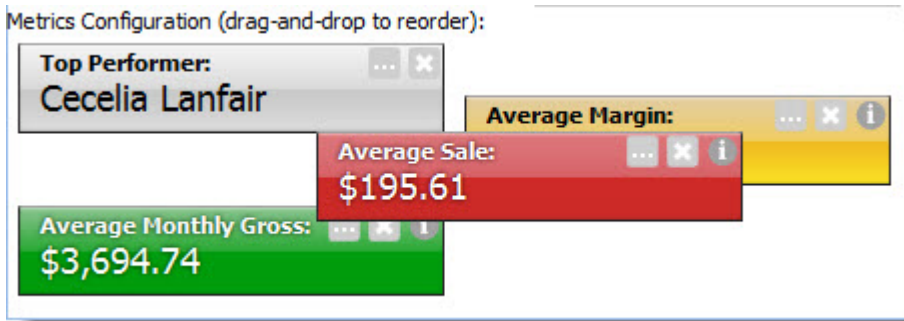
+ Add - Remove

Message ▼	Min	Min Inclusive	Max	Max Inclusive	Icon
Below desired range		▼	200	False	⊗ ▼

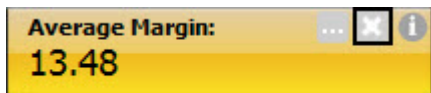
Update Cancel

Rearranging the metric boxes

The power user can customize the order of the metric boxes within the **Metric Bar** component by dragging and dropping the boxes into place (shown below).



The power user can also hide a metric box by clicking the **x** (highlighted below):



To show a hidden metric box, select it from the drop-down menu and click the **+** (highlighted below):



Results Table

The **Results Table** component provides a simple interface for displaying results. The **Results Table** component can show results from Analytics and non-Analytics queries.

It provides a list of records in table form and enables users to view a record's details. Users can page through, sort, and scroll across large tables, switch between tabs, and drill down on selected results. Pinned columns help users keep track of the data they are viewing.

Results Table						
Actions ▾				Choose a column set: Tab 1 Tab 2		
<input type="checkbox"/>	P_WineType	P_Name	P_Score	P_Region	P_Price	P_DateRev
<input type="checkbox"/>	Zinfandel	Zinfandel Central	88	Other California	14.000000	10/15/96
<input type="checkbox"/>	White	Albarino Rias Bai	25	Spain	18.000000	06/15/93
<input type="checkbox"/>	White	Alsace Gentil	83	Alsace	9.000000	11/15/94
<input type="checkbox"/>	White	Alella Marques de	76	Spain	11.000000	04/15/94
<input type="checkbox"/>	White	Alsace Grand Cru	84	Alsace	16.000000	11/15/94
<input type="checkbox"/>	White	Chardonnay Nap	82	Napa	11.000000	07/31/95
<input type="checkbox"/>	White	Chardonnay Nap	81	Napa	18.000000	07/31/96
<input type="checkbox"/>	White	Sauvignon Blanc	79	New Zealand		05/15/94
<input type="checkbox"/>	White	Greece Laoutari	78	Greece	19.000000	04/30/97
<input type="checkbox"/>	White	Chardonnay Utiel	75	Spain	6.000000	04/30/95

Page 1 of 5708 Records per page ▾ Displaying records 1 - 10 of 5706



Note: The **Results Table** component supports the use of aggregated records. For details about configuring Discovery Framework data sources for aggregated records, see the *Discovery Framework Installation Guide*.

Dependencies

To see the details of a selected record, you need to have an instance of the **Record Details** component available in the application, either on the same page or on a page specified as the target.

Only Analytics statements with aggregation are supported in the **Results Table** component. If you are using an Analytics statement in the **Results Table** component, that statement must include a GROUP BY. If it does not, the table displays only a single row data on each page, and the records per page option does not have any effect.

About attribute names

- Attributes (properties and dimensions) with parentheses in their names are not supported in the **Results Table** component.
- As a best practice, you should use NCName-compliant attribute names. If more user-friendly display names for attributes are required, you can provide them by using the display name feature of the **Attribute Settings** administrative component.

Related Links

[Record Details](#) on page 106

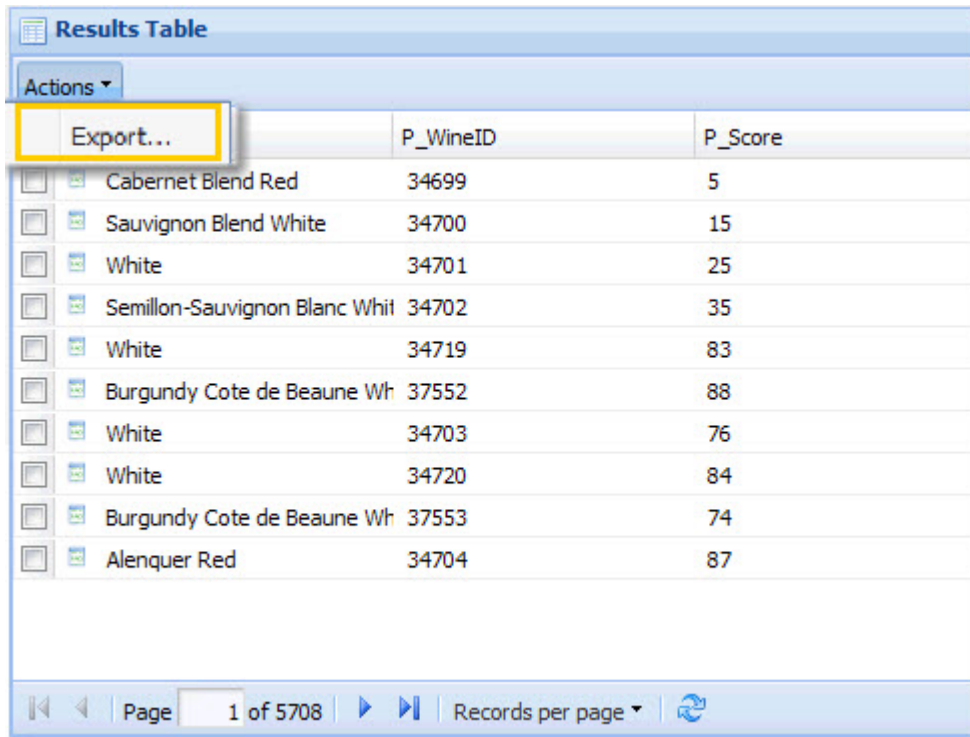
The **Record Details** component displays all of the properties and dimensions for a record in the **Results Table** component.

Using Results Table

This topic describes how an end user can use the **Results Table** component.

The **Results Table** component provides end users with a list of records in table form and enables them to view record details for both Analytics and non-Analytics queries. The **Results Table** component enables end users to page through records, sort them by clicking the column headers and drill-down to view a record's details in the **Record Details** component.

In addition, the end user can export the record list to Excel, by clicking **Actions > Export**:



Results Table

Actions ▾

Export...

		P_WineID	P_Score
<input type="checkbox"/>	Cabernet Blend Red	34699	5
<input type="checkbox"/>	Sauvignon Blend White	34700	15
<input type="checkbox"/>	White	34701	25
<input type="checkbox"/>	Semillon-Sauvignon Blanc Whit	34702	35
<input type="checkbox"/>	White	34719	83
<input type="checkbox"/>	Burgundy Cote de Beaune Wh	37552	88
<input type="checkbox"/>	White	34703	76
<input type="checkbox"/>	White	34720	84
<input type="checkbox"/>	Burgundy Cote de Beaune Wh	37553	74
<input type="checkbox"/>	Alenquer Red	34704	87

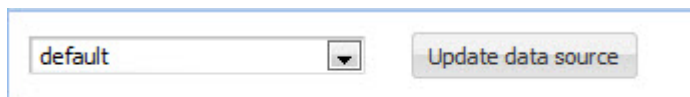
Page 1 of 5708 Records per page ▾

Configuring Results Table

The power user can set the following preferences for the **Results Table** component.

You can view and sort matching results by any dimension or metric, rename and format fields for user-friendly display, and expose high volumes of information through multiple tabs.

- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.

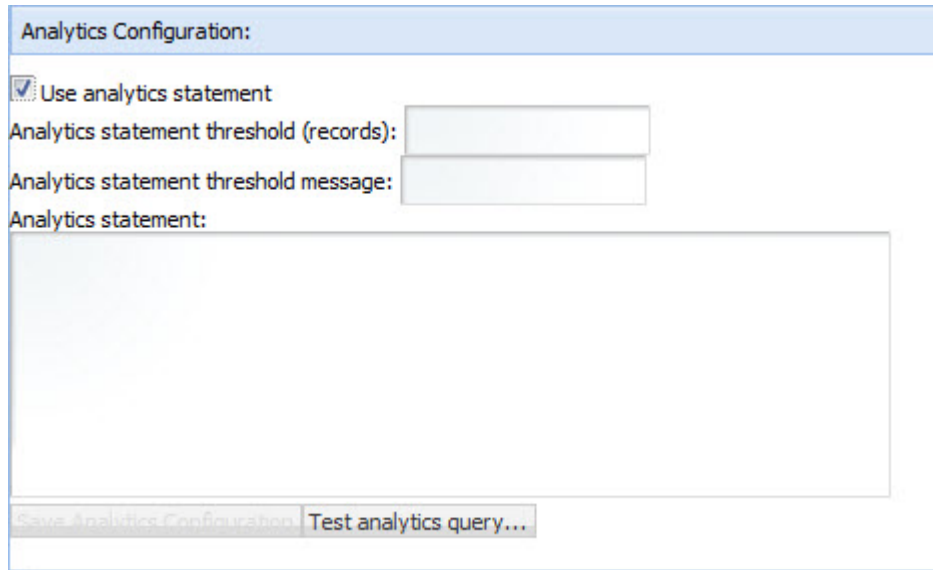


default ▾ Update data source

- **Analytics Configuration:** Provide table-based results display for Analytics statements.



Note: If **Use analytics statement** is not selected, the **Analytics statement** text field and the buttons beneath it do not appear in the **Preferences** display.



Analytics Configuration:

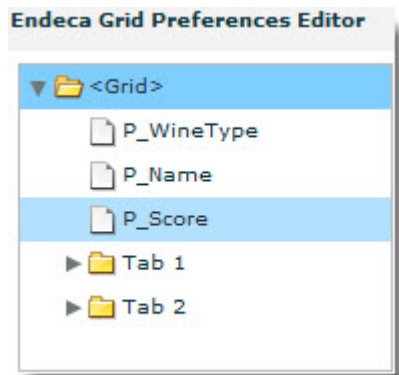
☒ Use analytics statement

Analytics statement threshold (records):

Analytics statement threshold message:

Analytics statement:

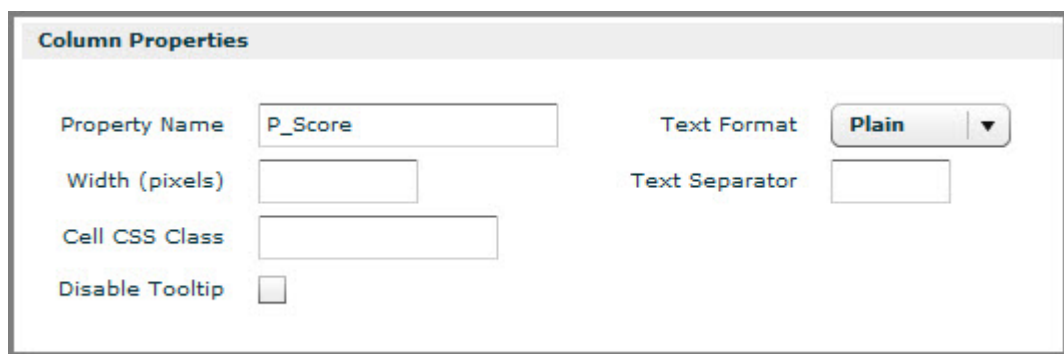
- **Grid Preferences Editor:** The grid control allows you to pin properties to ensure visibility when switching tabs, and to drag properties between tabs.



Endeca Grid Preferences Editor

- <Grid>
 - P_WineType
 - P_Name
 - P_Score
 - Tab 1
 - Tab 2

By clicking on any tab or column name in the **Grid Preferences Editor**, the power user can edit properties for that element. The power user can set the tab name, as well as set any column to be displayed exactly as-is ("Plain"), as HTML, as an integer, or as currency. Additionally, there are formatting options for showing or hiding the tool tip, setting the separator to use if the column has multiple values, and setting the width of the column.



Column Properties

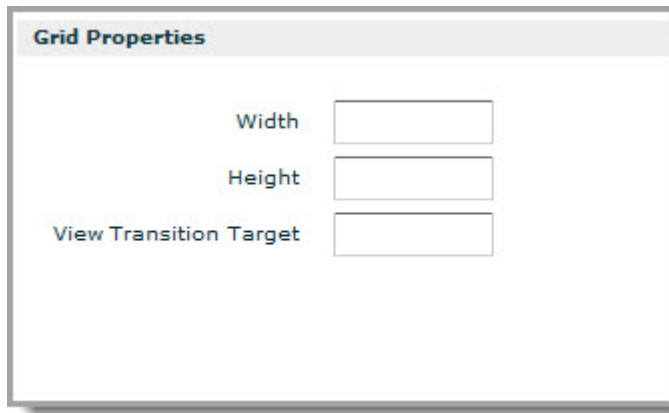
Property Name: Text Format: ▼

Width (pixels): Text Separator:

Cell CSS Class:

Disable Tooltip: ☐

- **Grid Properties:** Set the dimensions of the grid and indicate where the results will display. If **View Transition Target** is blank, the record detail link triggers events on the same page, causing any **Record Detail** component on the same page to display the selected record. If **View Transition Target** specifies a target page, clicking the record detail link changes to the specified page, and causes any **Record Detail** component on the target page to display the selected record. The target can be specified as a relative path from `/web/guest` or an absolute path.

A dialog box titled "Grid Properties" with a light gray header. It contains three labels on the left: "Width", "Height", and "View Transition Target". Each label is followed by a white rectangular input field. The "View Transition Target" field is slightly larger than the others.

- **New Column**, **New Tab**, and **Remove** buttons: Add and format columns for additional properties, add new tabs, or remove a tab or a column for a property.

Three buttons arranged horizontally. Each button has a light gray background and a thin border. The first button is labeled "New Column", the second "New Tab", and the third "Remove".

Results Table (Beta enhancements)

This release of the Discovery Framework includes an enhanced version of the **Results Table** component. This new version is in Beta for this release.

With the enhanced version of the **Results Table** component, you can view and sort matching results by any dimension or metric, rename and format fields for user-friendly display, and expose high volumes of information through multiple tabs.

P_Name	P_WineType	Region	P_Score
A Red Blend Alexander Valley	Cabernet Blend, Red	Sonoma	5
A Tribute White Sonoma Mour	Sauvignon Blend, White	Sonoma	15
Albarino Rias Baixas	White	Spain	25
Alchemy Mendocino County	Semillon-Sauvignon Blanc, Wh	Mendocino Lake	35
Sauvignon Blanc California Co	Sauvignon Blanc, White	Other California	50
Riesling Auslese Rheingau Ruc	Auslese, White	Germany	55
Coteaux du Tricastin Rose Bel	Blush, Rhone	Rhone	60
Cotes de Provence Rose	Blush, Other France	Provence	55
White Grenache Cucamonga V	Blush, Grenache	South Coast	59
Chassagne-Montrachet Clos S	Burgundy Cote de Beaune, W	Burgundy	60
Chassagne-Montrachet La Gra	Burgundy Cote de Beaune, W	Burgundy	60
Chassagne-Montrachet Les Pi	Burgundy Cote de Beaune, W	Burgundy	60

The enhanced **Results Table** component includes the following features:

- Support for attribute sets.
- Power users can configure a link from each record to an external system.
- Power users has enhanced configuration options for custom actions.
- Power users can configure a default sort order for results in the table.
- Power users can configure a default number of records per page.
- Power users can disable end user paging/sorting controls.
- Power users can configure a threshold for maximum records over which analytics queries will not be performed.
- End users can refine results by clicking dimension values in table cells.
- End users can view a totals/summary row for analytics results in the table.
- End users can print the **Results Table**.

Configuring Results Table (Beta enhancements)

The power user can set the following preferences for the enhanced version of the **Results Table** component.

Analytics Configuration:

☐ Use analytics statement

Results Table Configuration:

Locked Columns

Drag and Drop a column here

Attribute sets

Filter Attributes...

- ☒ **Ratings**
 - ☐ Price Range
 - ☐ Review Score
 - ☐ Designation
- ☒ **Characteristics**
 - ☐ Body
 - ☐ Flavors
 - ☐ Drinkability
- ☒ **Other**
 - ☐ P_WineType
 - ☐ Endeca.NumWords
 - ☐ P_Flavor
 - ☐ P_WineID
 - ☐ Endeca.NumAssigns
 - ☐ Region
 - ☐ P_Score
 - ☐ P_Region
 - ☐ P_DateReviewed

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Grid properties

Height: Records per page:

Width: Default records per page:

Default sort order:

Enable end-user records per page: ☒

Enable end-user pagination: ☒

Enable end-user sorting: ☒

Enable analytics summary: ☒

Action menu properties

Enable action menu: ☒

Action menu name:

Available actions

exportAction

Selected actions

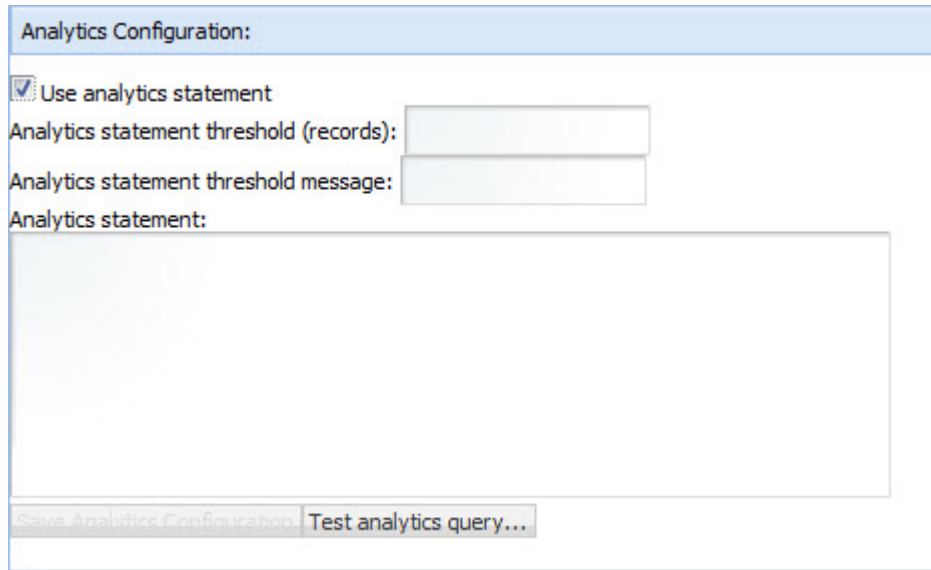
Reset configuration Cancel Save

- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.

- **Analytics Configuration:** Provide table-based results display for Analytics statements.



Note: If **Use analytics statement** is not selected, the **Analytics Configuration** options below do not appear in the **Preferences** display.



Analytics Configuration:

☒ Use analytics statement

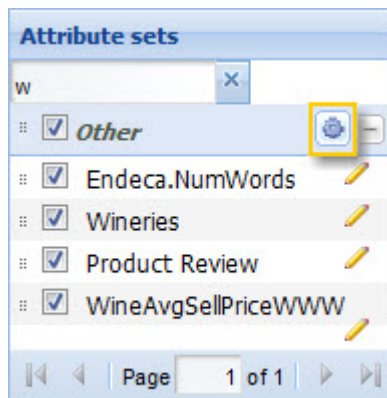
Analytics statement threshold (records):

Analytics statement threshold message:

Analytics statement:

[Save Analytics Configuration](#) [Test analytics query...](#)

- **Locked Columns:** Pin attributes to ensure visibility when switching tabs and scrolling.
- **Attribute sets:** Select the attributes to be displayed to the end user. The power user can search for an attribute by name (with type-ahead), as well as check and uncheck attributes and attribute sets directly.



Attribute sets

W

☒ **Other** ☒

☒ Endeca.NumWords

☒ Wineries

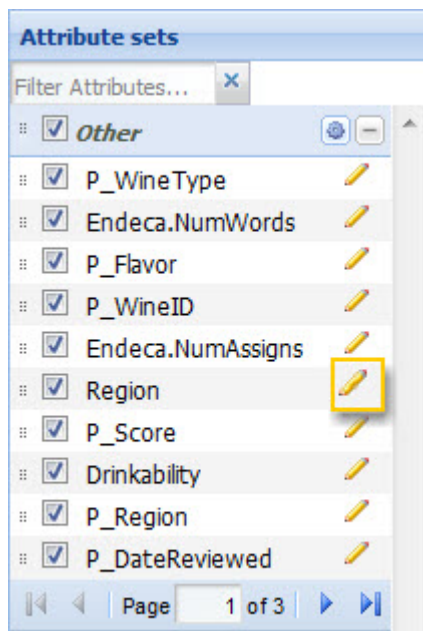
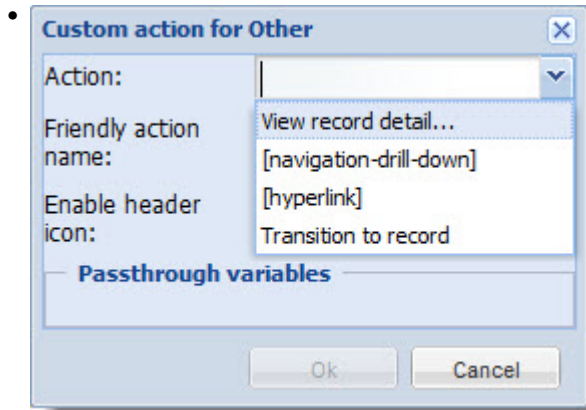
☒ Product Review

☒ WineAvgSellPriceWWW

Page 1 of 1

The **Actions** button (highlighted above) opens the **Custom action** dialog box, where the power user can choose from the following actions:

- View record detail, and indicate where the results will display. If **View Transition Target** is blank, the record detail link triggers events on the same page, causing any **Record Detail** component on the same page to display the selected record. If **View Transition Target** specifies a target page, clicking the record detail link changes to the specified page, and causes any **Record Detail** component on the target page to display the selected record. The target can be specified as a relative path from `/web/guest` or an absolute path.
- Navigation drill down
- Hyperlink, which allows the end user to click a link to access an external system.



The **Edit** button (highlighted above) opens the **Options** dialog box, where the power user can set column format (Integer, Currency, Decimal, or String) and associated formatting details. Additionally, there are options for showing or hiding the tool tip and setting the width of the column. The power user can also enable drill-down on the dimension value, if the attribute is a dimension, or bind a custom action link to the attribute value (for example, a record detail view could be hyperlinked to an external system).

The 'Options' dialog box is shown with the following settings:

- Body**: Width (pixels): [empty], Disable tooltip: ☒
- Format**: String
- Formatter Options**:
 - ☒ Default (no change)
 - ☐ Lower Case
 - ☐ Upper Case
 - ☐ Title Case
- ☐ Enable drilldown
- ☐ Enable custom action

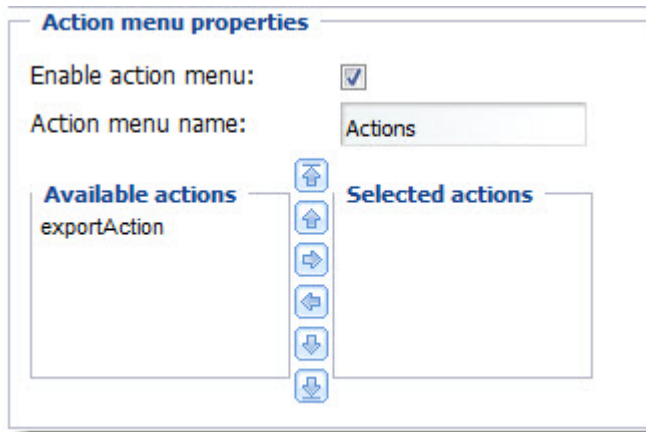
Buttons: Cancel, Save

- **Grid properties:** Set the following:
 - The dimensions of the grid.
 - The default sort order for each attribute.
 - The number of records displayed on each page in the **Results Table**, and the number of records on each page.
 - Whether end users can set records per page, pagination, or sorting in their own display.
 - Whether Analytics results are totaled in a summary row in the **Results Table**.

The 'Grid properties' dialog box is shown with the following settings:

- Height**: [empty]
- Width**: [empty]
- Default sort order**:
 - Price Range
 - Vintage
 - Wine Type
- Records per page**: 10,20,30
- Default records per page**: 10
- Enable end-user records per page**: ☒
- Enable end-user pagination**: ☒
- Enable end-user sorting**: ☒
- Enable analytics summary**: ☒

- **Action menu properties:** Enable and name an action menu for end users, and select and order their menu options.





Tag Cloud

The **Tag Cloud** component provides a visualization that lists textual attribute values (or tags) and their significance in the current result set. It can be configured to allow end users to filter results to only those containing a particular tag.

The visualization lists the various tags that exist for a given attribute across a result set. The relative significance of each tag is indicated by automatically-assigned tag font sizes.



 **Note:** The **Tag Cloud** component supports base records and aggregate records. It does not support Analytics records.

 **Note:** In order to provide a meaningful summary, the **Tag Cloud** component must be associated with an attribute that consists of numerous textual attribute values.

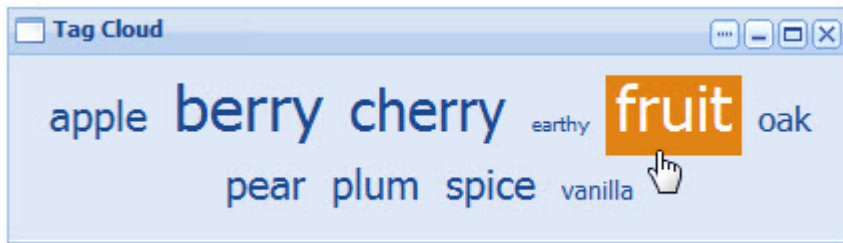
Using Tag Cloud

This topic describes how an end user can use the **Tag Cloud** component.

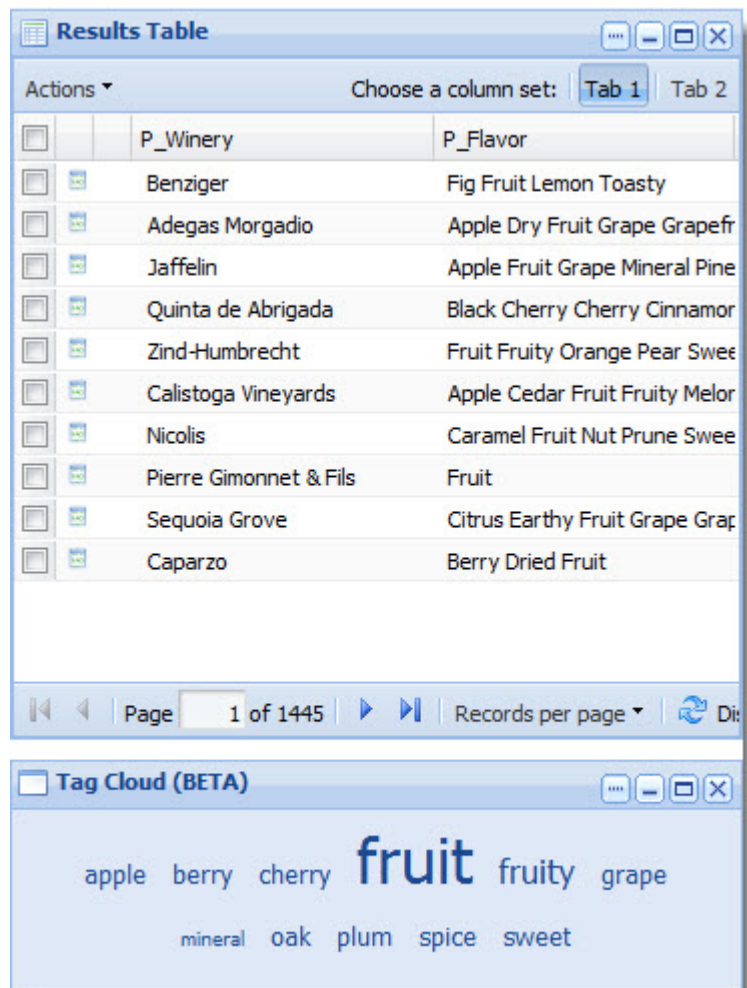
Upon display of the component, the end user sees a summary of which textual attribute values (or tags) exist for a particular attribute across the current record set, where the relative significance of each textual attribute value is represented by the tag's font size.

The component can be configured so that the end user can click on a tag to refine the result set to the records associated with that textual attribute value.

In the following example, the end user clicks on the **fruit** tag:



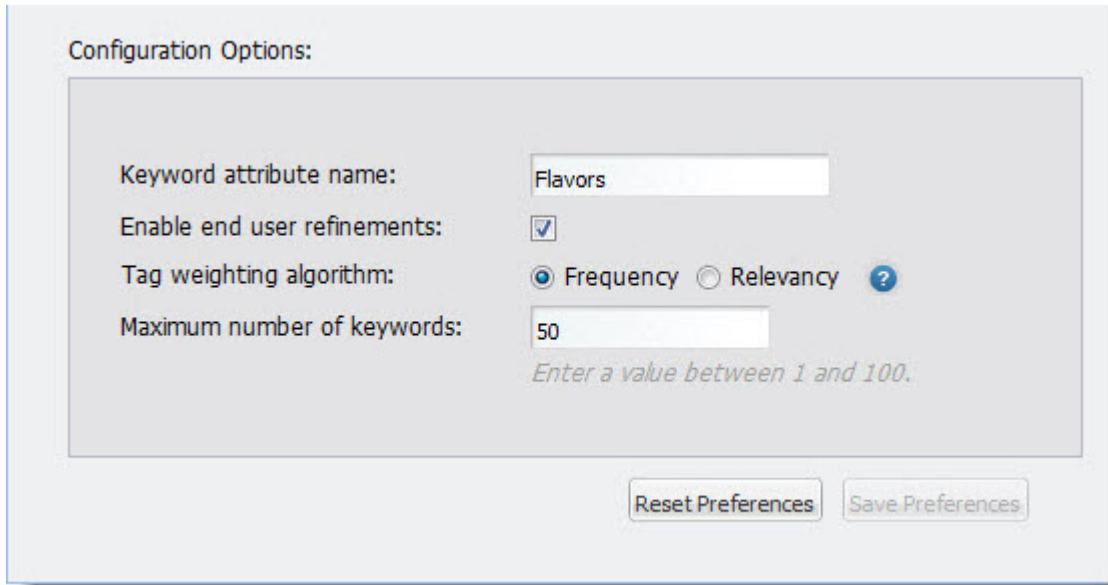
This issues a navigation refinement, which updates the **Breadcrumbs** component, along with any other components that uses that data source. The image below shows **Tag Cloud** and a related **Results Table** component after the **fruit** tag was clicked:



As you can see, the relative size of tags also changes, to accurately reflect the state of the underlying data.

Configuring Tag Cloud

The power user can set the following preferences for the **Tag Cloud** component.



Configuration Options:

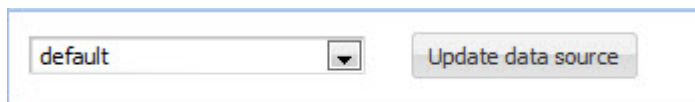
Keyword attribute name:

Enable end user refinements: ☒

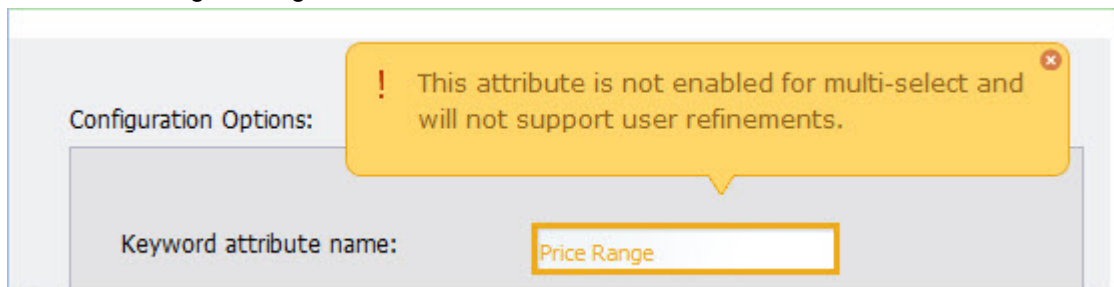
Tag weighting algorithm: ☒ Frequency ☐ Relevancy [?](#)

Maximum number of keywords:
Enter a value between 1 and 100.

- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.



- **Keyword attribute name:** Type the name of the attribute the tags will be drawn from. If you enter an attribute that is not enabled for multi-select, it will not support user refinements, and you will see the following message:



Configuration Options:

Keyword attribute name:

! This attribute is not enabled for multi-select and will not support user refinements.

- **Enable end user refinements:** Check to allow end users to drill down on tags in the tag cloud. If the attribute is not enabled for multi-select, this option is not available.
- **Tag weighting algorithm:** Choose one of the following to determine the significance of a tag:
 - **Frequency:** If this option is selected, the tags in the tag cloud are sized to represent the number of records associated with the related attribute value. The terms with the largest font size are associated with the greatest number of records.
 - **Relevancy:** If this option is selected, tags in the tag cloud are sized to represent the number of records associated with the tag, and then are weighted relative to their uniqueness in the matching record set. Terms that appear throughout the index are less relevant, and appear smaller, than those that appear only in the matching records. This strategy is recommended if certain terms appear on most records in the index, to ensure that these common terms are displayed less prominently in the tag cloud.

- **Maximum number of keywords:** Specify the maximum number of attribute values to display in the **Tag Cloud** component. The default is 30.

Filtering components

The components in this section allow you to search, navigate, and filter your data.

Related Links

[Breadcrumbs](#) on page 82

The **Breadcrumbs** component provides breadcrumb navigation aid functionality.

[Guided Navigation](#) on page 85

The **Guided Navigation** component provides Endeca Guided Navigation® functionality.

[Range Filter](#) on page 92

The **Range Filter** component allows you to add and modify range filters.

[Search Box](#) on page 94

The **Search Box** component provides record and dimension search functionality.

[Find Similar](#) on page 100

The **Find Similar** component provides end users with the opportunity to find other records that share common attributes with a specific record of interest.

Breadcrumbs

The **Breadcrumbs** component provides breadcrumb navigation aid functionality.

The **Breadcrumbs** component summarizes any Guided Navigation selections, keyword searches, or range filters specified by the end user in a vertical stack of selected values. If multiple selections from single dimension are made, they are displayed separately in sequential order. Breadcrumbs support multi-select AND and OR refinements, but not record filters.

When used with keyword search, the **Breadcrumbs** component features spelling correction, as displayed in the following example:



Note: The **Breadcrumbs** component supports the use of aggregated records. For details about configuring Discovery Framework data sources for aggregated records, see the *Discovery Framework Installation Guide*.

Dependencies

The **Breadcrumbs** component requires a backing data source.

One of the following components must also be present: **Guided Navigation**, **Search Box**, or **Range Filter**.

Related Links

[Search Box](#) on page 94

The **Search Box** component provides record and dimension search functionality.

[Guided Navigation](#) on page 85

The **Guided Navigation** component provides Endeca Guided Navigation® functionality.

[Range Filter](#) on page 92

The **Range Filter** component allows you to add and modify range filters.

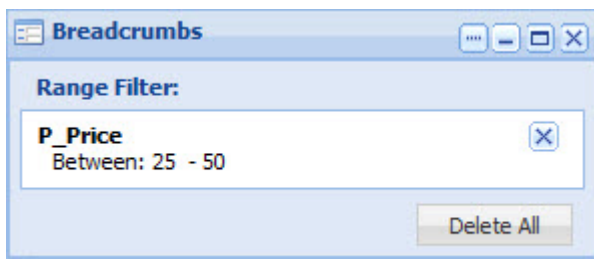
Using Breadcrumbs


This topic describes how an end user can use the **Breadcrumbs** component.

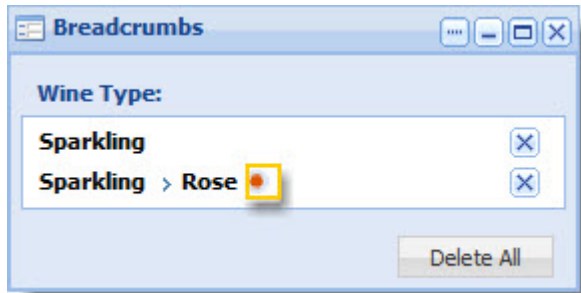
The following example is based on **Guided Navigation** selections. Note the hierarchical selection in the Wine Type dimension.



The following example is based on a **Range Filter** selection.



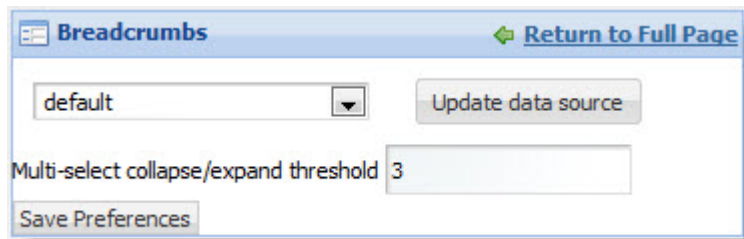
If a breadcrumb is based on a negative refinement (as enabled in the **Guided Navigation** component), that refinement is flagged with a  icon. In the following **Guided Navigation** example, the refinement excludes Rose from the results.



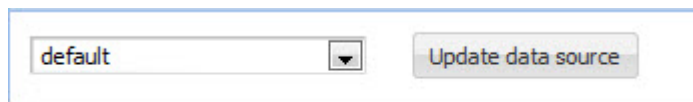
End users may remove individual selections or all selections within displayed breadcrumbs, and can also select a specific ancestor within the hierarchy for display.

Configuring Breadcrumbs

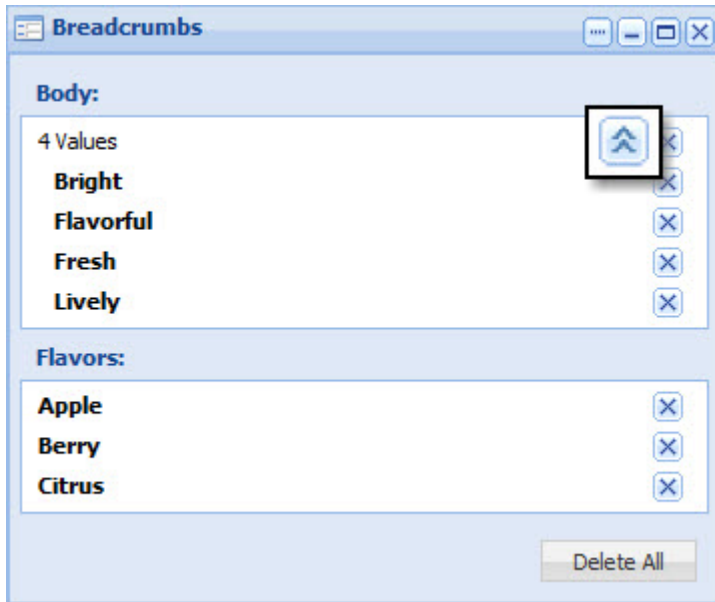
The power user can set the following preferences for the **Breadcrumbs** component.



- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.



- **Multiselect collapse/expand threshold:** Set the number of dimension values after which the list can be collapsed. In the example below, dimension values for the Body dimension can be collapsed, because there are more than three selected. The dimension values for Flavors, on the other hand, cannot be collapsed, because there are only three selected.



Guided Navigation

The **Guided Navigation** component provides Endeca Guided Navigation® functionality.



The **Guided Navigation** component provides contextual navigation across large volumes of structured MDEX Engine-specific data. End users can expand and close multiple dimension groups, view dimension values from multiple dimensions at a time, and select multi-OR and multi-AND dimensions. End users can also apply negative refinements to exclude dimension values from results if negative refinements are enabled by the power user.

The component shows the dimension groups that are configured in the MDEX Engine. It also displays base refinement statistics if they are enabled in the MDEX Engine.



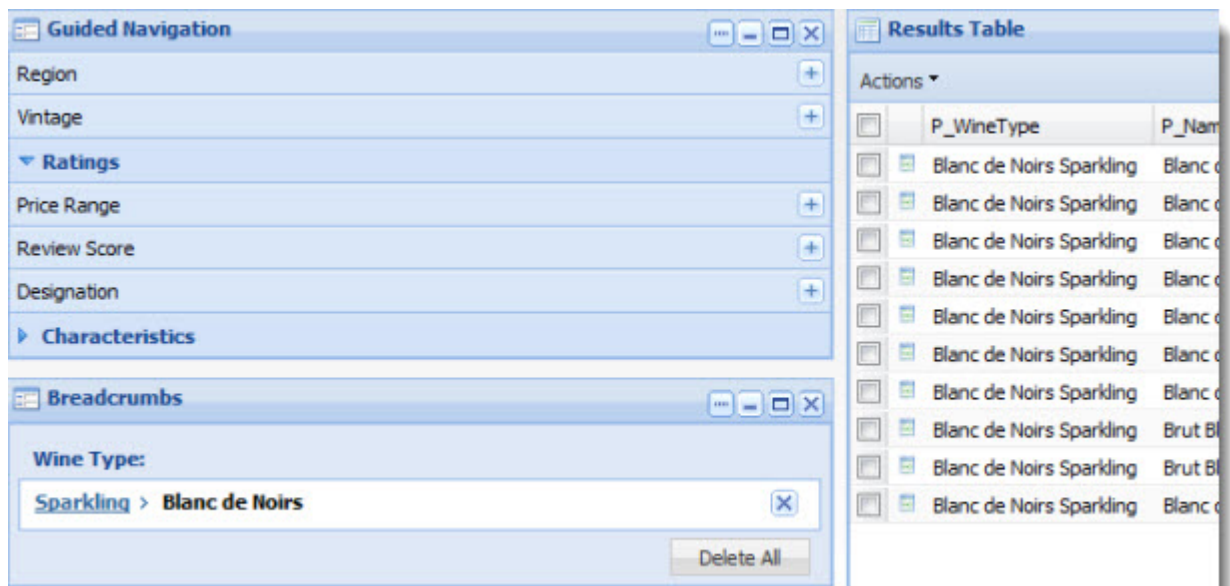
Note: Contracted or implicit dimension values and dead ends are not shown in this component.

The **Guided Navigation** component does not support multi-select for hierarchical dimensions, nor does it support tree view controls. Also, aggregated statistics are not supported in this component.

Dependencies

The **Breadcrumbs** component is required in order to view or clear **Guided Navigation** component selections.

The image below shows the interaction between the **Guided Navigation**, **Breadcrumbs**, and **Results Table** components. The navigation state, which is displayed in the **Breadcrumbs** component, determines what is displayed in the **Results Table** component. If the user navigated to a different state in the **Guided Navigation** component, the other two components would dynamically update to reflect the change.



Note: The **Guided Navigation** component supports the use of aggregated records. Specifically, when the component is using a data source with a rollup key specified, its refinements display the number of aggregated records. For details about configuring Discovery Framework data sources for aggregated records, see the *Discovery Framework Installation Guide*.



Note: In order for the **Guided Navigation** component to generate aggregated record refinement statistics, the `--stat-abins` flag must be enabled on the MDEX Engine.



Note: The **Guided Navigation** component includes a threshold on the maximum number of dimension values that can be displayed at once within a dimension. The default value is 500. This threshold is in place for performance and usability reasons, so that the end user's experience can be managed for cases where dimensions include very long lists of dimension values. This threshold can be used in conjunction with dynamic ranking and type-ahead search in the **Guided Navigation** interface, so users can still access specific values by filtering for them.

Related Links

[Breadcrumbs](#) on page 82

The **Breadcrumbs** component provides breadcrumb navigation aid functionality.

[Results Table](#) on page 69

The **Results Table** component provides a simple interface for displaying results. The **Results Table** component can show results from Analytics and non-Analytics queries.

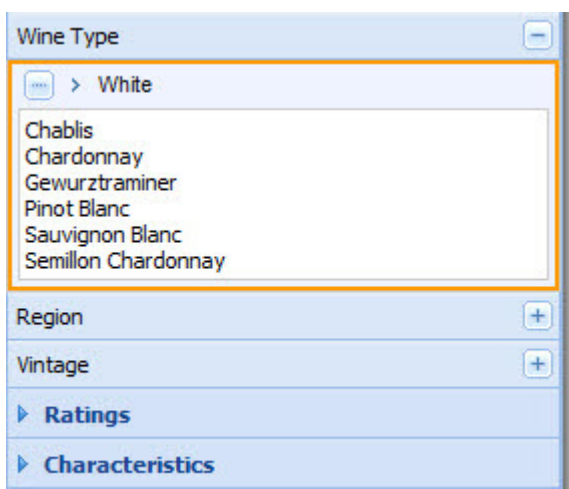
Using Guided Navigation

This topic describes how an end user can use the **Guided Navigation** component.

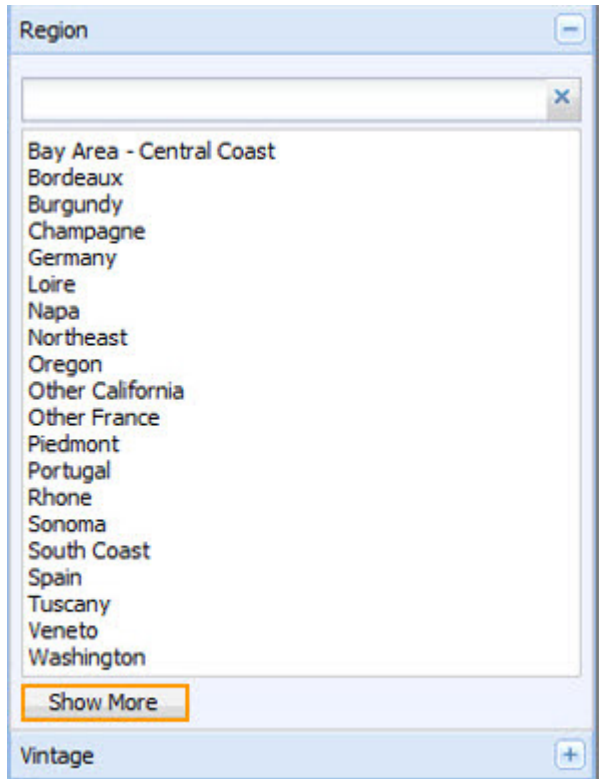


Note: The appearance of the Guided Navigation display varies depending on the dimension data and hierarchy.

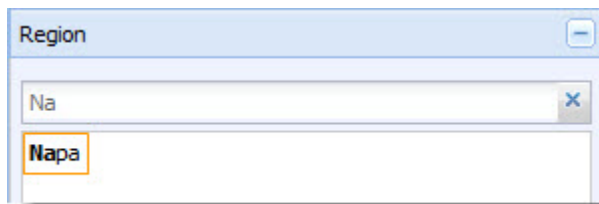
The **Guided Navigation** component can feature dimension hierarchy:



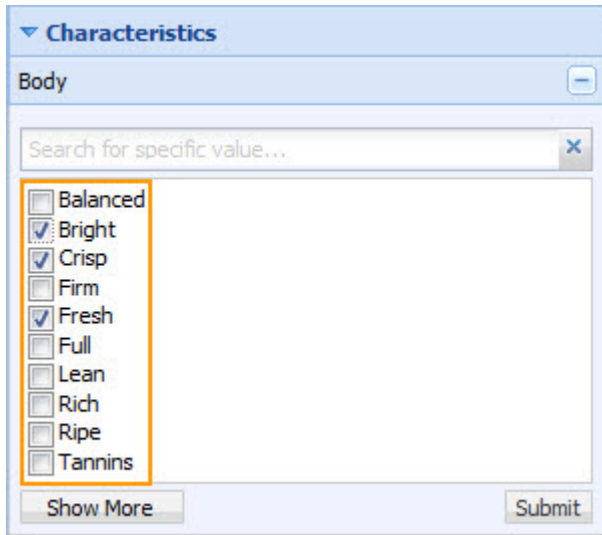
It features **Show More** functionality for large data sets:



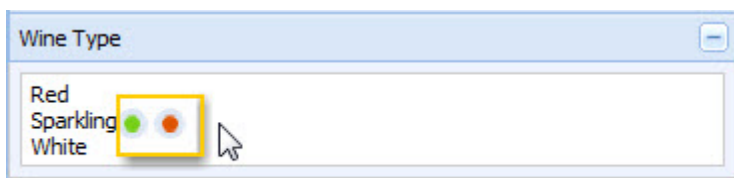
It can include type-ahead:



It can incorporate multi-select OR dimensions through a check-box interface:



It can include negative as well as positive refinements, which allow you to exclude refinements from the results displayed.



Configuring Guided Navigation

The power user can set the following preferences for the **Guided Navigation** component.

The edit controls on the **Guided Navigation** component allow you to configure the layout so only facets relevant to the end user are exposed.

Guided Navigation

default

Configuration Options

☒ Enable type-ahead
Maximum type-ahead suggestions: 20
Maximum values to show in a single attribute: 500
☒ Enable automatic attribute updates in end user view

Target page:

Attribute list

Filter Attributes...

	Show expanded by default	Allow negative refinements
<input checked="" type="checkbox"/> <i>Other</i>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Flavors	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> ADG Refinement Center	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Designation	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Price Range	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Wine Type	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Drinkability	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Region	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Vintage	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Review Score	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Body	<input type="checkbox"/>	<input type="checkbox"/>

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- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.

default

- **Configuration Options**, including:

Configuration Options

<input checked="" type="checkbox"/> Enable type-ahead	Maximum values to show in a single attribute:
Maximum type-ahead suggestions: 20	500
<input checked="" type="checkbox"/> Enable automatic attribute updates in end user view ?	Target page:

- **Enable type-ahead:** Check to include the **Type-ahead** search box on dimensions with many dimension values.



Important: Dimension search wildcarding must be enabled in the MDEX Engine in order for type-ahead to work in Discovery Framework components.

- **Maximum type-ahead suggestions:** Set the maximum total number of type-ahead suggestions the MDEX Engine will offer. If fewer results are available, the number returned will be less than this maximum. Note that this control is only visible if **Enable type-ahead** is selected.
- **Enable automatic attribute updates in end user view:** When enabled, the end user's view automatically reflects attribute changes in the MDEX Engine and in the **Attribute Settings** administrative component.



Important: For data sources with large numbers of attributes, this feature may significantly reduce the speed and responsiveness of the end user's interface.

- **Maximum refinements to show in a single dimension:** Set the maximum number of refinements per dimension to be displayed. This can help prevent your end users from being overwhelmed by an excessive number of results.
- **Target Page:** Set the target page for any page transition. Page transitions allow a component on one page in your Discovery Framework application to pass data to a component on another page.

- **Attribute list**, including:

	Show expanded by default	Allow negative refinements
<input checked="" type="checkbox"/> Other		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Flavors	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Vintage	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Review Score	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Search for an attribute by name.
- Check which individual attributes or attribute sets to include. Attributes that are not selected are hidden from the end user's view.
- Select attributes that will appear expanded by default in the end user's view. (The end user may choose to collapse expanded dimensions.)
- Select attributes that can be used for negative as well as positive refinements. A negative refinement, when selected, is excluded from results.

Range Filter

The **Range Filter** component allows you to add and modify range filters.

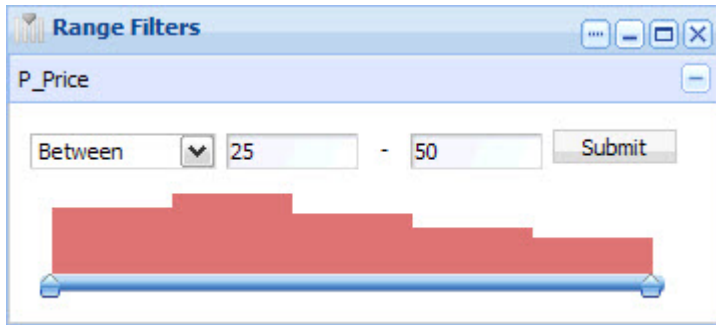


Note: The **Range Filter** component provides numeric and date filtering, but not geocode filtering. You cannot use the **Range Filter** component to filter on dimensions.

Using Range Filter

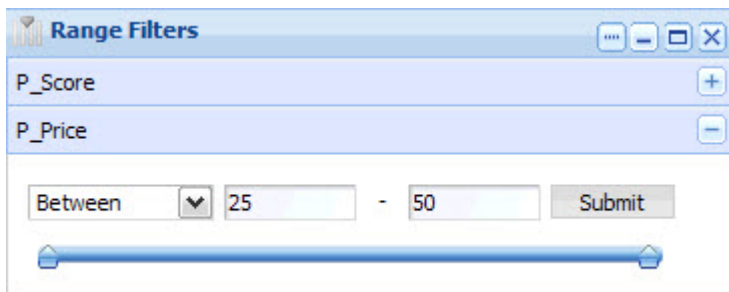
This topic describes how an end user can use the **Range Filter** component.

If the power user has configured a range filter for a property, the end user sees something like this:

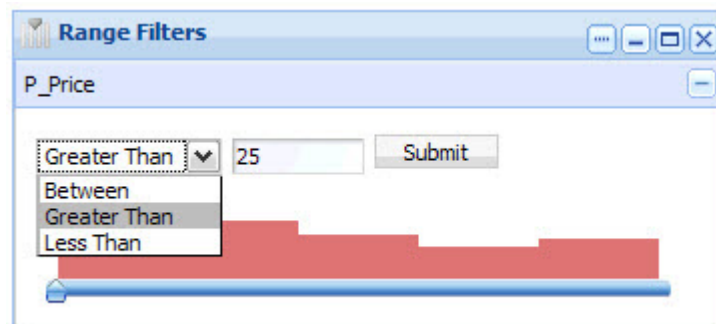


The histogram gives the end user a high-level view of the data. The end user can use the slider bar to refine the filter within the defined range.

It is also possible for the power user to configure the range filter to display the slider bar with no histogram:



The end user can also select the **Greater Than** and **Less Than** filters from the drop down list:

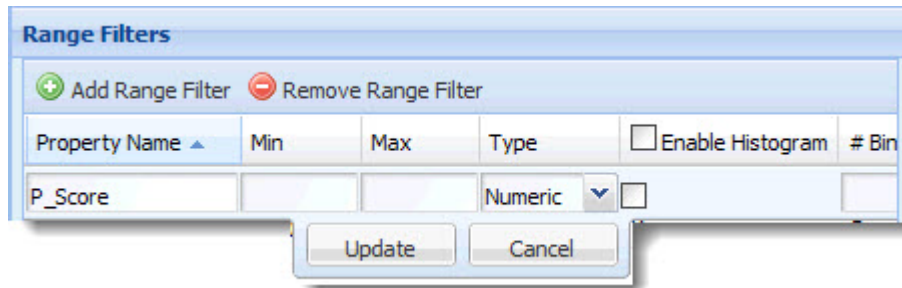


Configuring Range Filter

The power user can add and remove range filters on existing properties in the data set in the **Range Filters** component.

- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.

- **Range Filters:** Establish range filters for existing properties. When adding a range filter, you can set the following features:



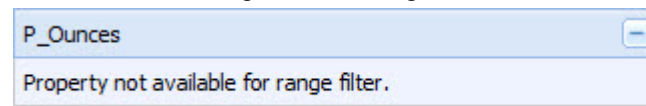
The 'Range Filters' dialog box contains the following elements:

- Buttons: '+ Add Range Filter' and '- Remove Range Filter'.
- Table with columns: Property Name, Min, Max, Type, Enable Histogram, # Bin.
- Row 1: P_Score, (empty), (empty), Numeric, ☐, (empty).
- Buttons: 'Update' and 'Cancel'.

- The name of the property this filter is based on.



Note: Property names are case sensitive. In addition, you need to know the exact name of the property for which you want to create a filter (you can consult the **Endeca Attribute Settings** component if you are unsure of a property's name). If you attempt to add a range filter based on a property that does not exist, when you return to the full page, you will see the following error message:



The error message dialog box displays:

- Property: P_Ounces
- Message: Property not available for range filter.

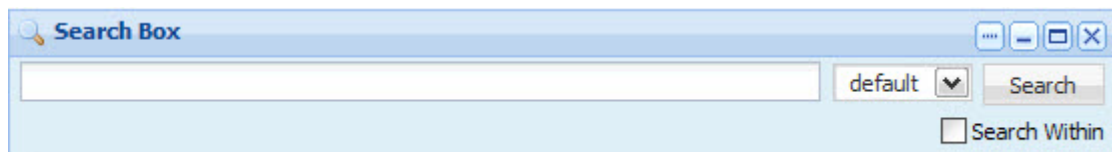
- Values for both **Min** and **Max** to provide a range, or a single value to allow **Greater Than** or **Less Than** filtering by end users.
- The type of range filter: Numeric or Date.
- **Enable Histogram** provides the end user with an interactive histogram control. If **Enable Histogram** is not selected, the end user sees a slider bar with no associated histogram.
- **# Bins** sets the number of bars to display in the histogram.

Min and Max date-time format

Min and **Max** values must be given in milliseconds-since-epoch format. The **Range Filter** does not accept formatted date strings (such as "11/22/2009") or values in standard seconds-since-epoch format.

Search Box

The **Search Box** component provides record and dimension search functionality.



The 'Search Box' component includes:

- Search icon and title 'Search Box'.
- Search input field.
- Drop-down menu with 'default' selected.
- 'Search' button.
- ☐ Search Within checkbox.

It allows end users to submit keyword searches based on available properties in the data source he or she selects from the drop-down list.

Power users can choose from multiple search interfaces and match modes when configuring this component to further control the information that is displayed to the end user. The **Search Box** component can also be configured to provide type-ahead suggestions populated with matching dimension values.

Dependencies

The **Search Box** component works in conjunction with the **Breadcrumbs** component, the **Results Table** component, and the **Guided Navigation** component.

Related Links

[Breadcrumbs](#) on page 82

The **Breadcrumbs** component provides breadcrumb navigation aid functionality.

[Results Table](#) on page 69

The **Results Table** component provides a simple interface for displaying results. The **Results Table** component can show results from Analytics and non-Analytics queries.

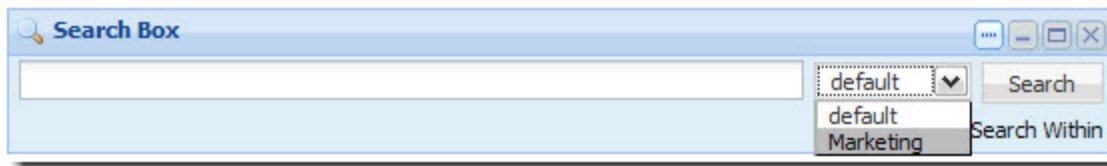
[Guided Navigation](#) on page 85

The **Guided Navigation** component provides Endeca Guided Navigation® functionality.

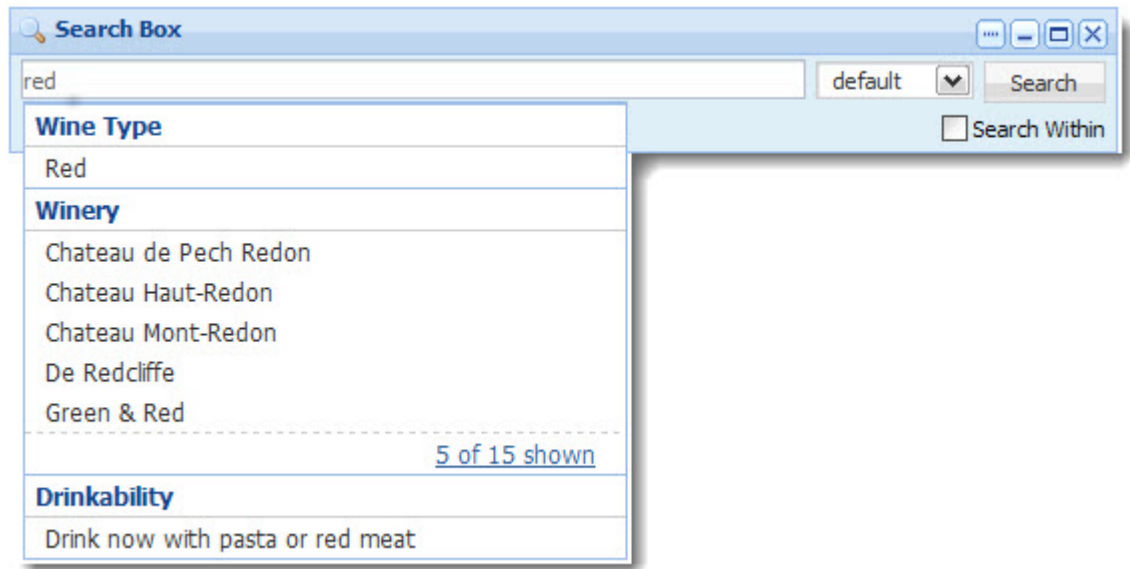
Using Search Box

This topic describes how an end user can use the **Search Box** component.

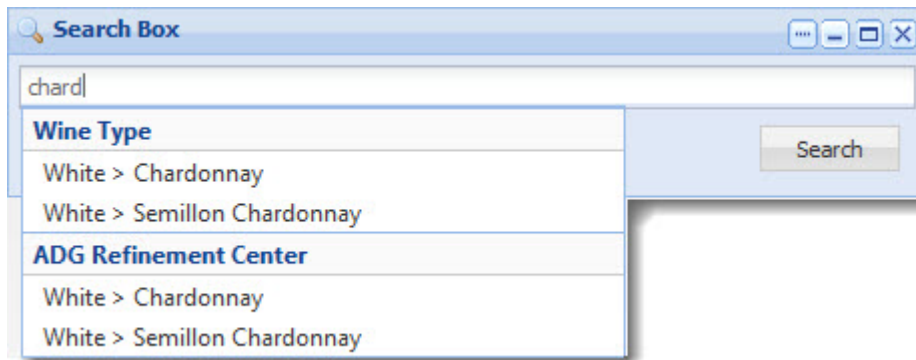
The end user can select a search configuration (based on a data source and a set of other criteria) from a list that the power user enables.



The end user can then enter a search term. In the example below, the end user typed the term *red*. The Wine Type, Winery, and Drinkability dimensions, along with matching dimension values, are made available as suggestions.



If the power user has enabled type ahead, the MDEX Engine will start offering dimension value suggestions before the user has typed a complete search term.



To restrict the results displayed to those within the current navigation state, the end user can check **Search Within**.

Configuring Search Box

The power user can set the following preferences for the **Search Box** component.

When you first open **Search Box** preferences, you see a list of existing search configurations:

Search Box [Return to Full Page](#)

Search Configurations

[Add Configuration](#) [Remove Configuration](#)

Display Name	Default	Data Source	Search Interface	Match Mode	Target Page
default	<input checked="" type="radio"/>	default	All	all	

Select a search configuration to see additional options.

[Save Preferences](#) [Revert Changes](#)

When you select a search configuration, or click **Add Configuration**, **Search Box** preferences updates to include options for type-ahead configuration:

Currently editing: **Marketing**

☒ **Enable type-ahead suggestions**

Minimum characters to trigger suggestions:

Maximum suggestions per dimension:

Maximum total suggestions:

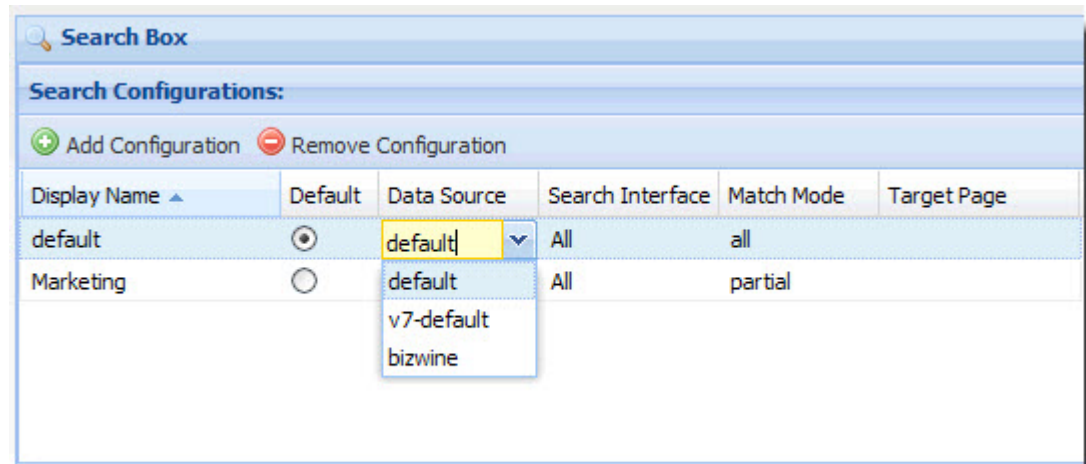
Show intermediate values: ☒

Dimension Configurations

Dimension Display Name	Included
Body	<input checked="" type="checkbox"/>
Region	<input checked="" type="checkbox"/>
Review Score	<input checked="" type="checkbox"/>
ADG Refinement Center	<input checked="" type="checkbox"/>
Winery	<input checked="" type="checkbox"/>
Flavors	<input checked="" type="checkbox"/>

- **Search Configurations:** You can add, remove, or edit configurations that are based on the following criteria:
 - **Display Name:** The name used in breadcrumbs.

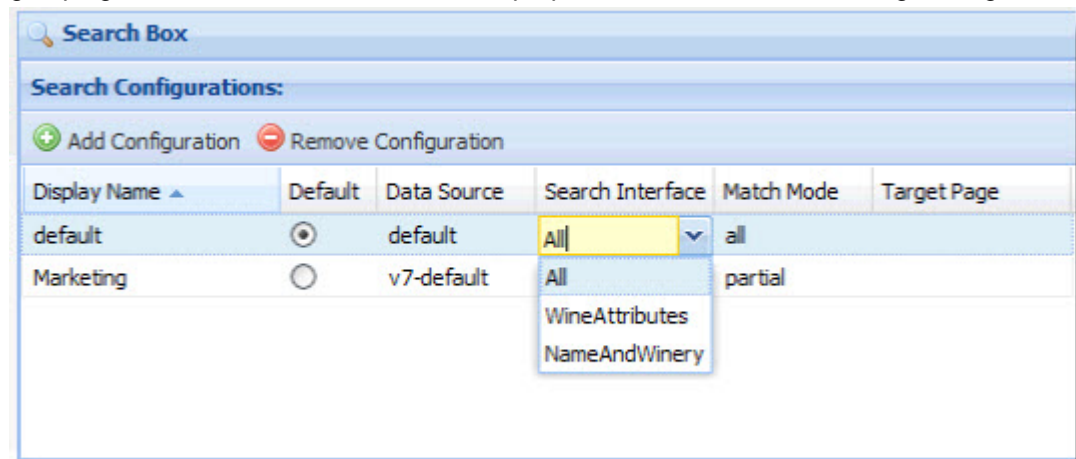
- **Default:** Choose which search configuration is the default.
- **Data Source:** Select one of the available data sources to associate with this search configuration.



The screenshot shows the 'Search Box' configuration window. Under 'Search Configurations:', there are two configurations: 'default' and 'Marketing'. The 'default' configuration is selected as the default. The 'Data Source' dropdown menu is open, showing options: 'default', 'v7-default', and 'bizwine'.

Display Name ▲	Default	Data Source	Search Interface	Match Mode	Target Page
default	<input checked="" type="radio"/>	default	All	all	
Marketing	<input type="radio"/>	default	All	partial	

- **Search Interface:** Select from the search interfaces defined in this data source. The search interface limits the end user's search, and allows you to control record search behavior for groupings of some number of dimensions, properties, attributes, and ranking strategies.



The screenshot shows the 'Search Box' configuration window. Under 'Search Configurations:', there are two configurations: 'default' and 'Marketing'. The 'default' configuration is selected as the default. The 'Search Interface' dropdown menu is open, showing options: 'All', 'WineAttributes', and 'NameAndWinery'.

Display Name ▲	Default	Data Source	Search Interface	Match Mode	Target Page
default	<input checked="" type="radio"/>	default	All	all	
Marketing	<input type="radio"/>	v7-default	All	partial	

- **Match mode:** Select a match mode from the drop-down list. Match modes allow you to specify a less restrictive matching strategy than the default conjunctive `MatchAll`.

The screenshot shows the 'Search Box' configuration window. Under 'Search Configurations', there are two configurations: 'default' and 'Marketing'. The 'Match Mode' column for 'default' is set to 'all', and the dropdown menu is open, showing options: 'all', 'any', 'partial', 'partialmax', 'boolean', 'allany', and 'allpartial'.

Display Name	Default	Data Source	Search Interface	Match Mode	Target Page
default	<input checked="" type="radio"/>	default	All	all	
Marketing	<input type="radio"/>	v7-default	All		

- **Target Page:** Optionally, set the target page for any page transition. Page transitions allow a component on one page in your Discovery Framework application to pass data to a component on another page. In the example below, data will be sent to a component on the **Comparisons**

The screenshot shows the 'Search Box' configuration window. Under 'Search Configurations', there are two configurations: 'default' and 'Marketing'. The 'Target Page' column for 'default' is set to 'Comparisons', and the dropdown menu is open, showing options: 'Comparisons'.

Display Name	Default	Data Source	Search Interface	Match Mode	Target Page
default	<input checked="" type="radio"/>	default	All	all	Comparisons
Marketing	<input type="radio"/>	v7-default	All	partial	

In addition, by clicking in the label of any column, you can sort the contents of that column and remove columns from the **Search Configurations** display.

- **Enable type-ahead suggestions:** Check to enable the MDEX Engine to start offering suggestions before the user has typed a complete search term. If **Enable type-ahead suggestions** is not selected, none of the remaining controls appear in the **Search Box** preferences.

☒ **Enable type-ahead suggestions**



Important: Dimension search wildcarding must be enabled in the MDEX Engine in order for type-ahead to work in Discovery Framework components.

- **Minimum characters to trigger suggestions:** Set the minimum number of characters needed before type-ahead suggestions are offered.

Minimum characters to trigger suggestions:

- **Maximum suggestions per dimension:** Set the maximum number of type-ahead suggestions the MDEX Engine will offer for each dimension.

Maximum suggestions per dimension:

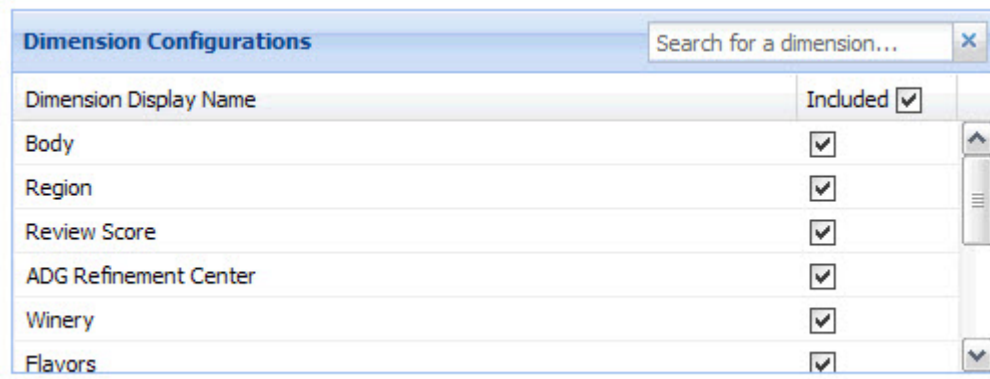
- **Maximum total suggestions:** Set the maximum total number of type-ahead suggestions the MDEX Engine will offer. If fewer results are available, the number returned will be less than this maximum.

Maximum total suggestions:

- **Show intermediate values:** Check this box to display the full path for hierarchical results.

Show intermediate values: ☒

- **Dimension Configuration:** Check **Included** to include all dimensions in the type-ahead results. Alternatively, the power user can search for a dimension, or select dimensions individually, to customize which dimensions are included.



The **Dimension Configurations** dialog box features a search bar at the top right labeled "Search for a dimension...". Below it is a table with two columns: "Dimension Display Name" and "Included". The "Included" column has a header checkbox that is checked, and each row has its own checkbox, all of which are also checked. The dimensions listed are Body, Region, Review Score, ADG Refinement Center, Winery, and Flavors. A vertical scrollbar is on the right side of the table.

Dimension Display Name	Included <input checked="" type="checkbox"/>
Body	<input checked="" type="checkbox"/>
Region	<input checked="" type="checkbox"/>
Review Score	<input checked="" type="checkbox"/>
ADG Refinement Center	<input checked="" type="checkbox"/>
Winery	<input checked="" type="checkbox"/>
Flavors	<input checked="" type="checkbox"/>

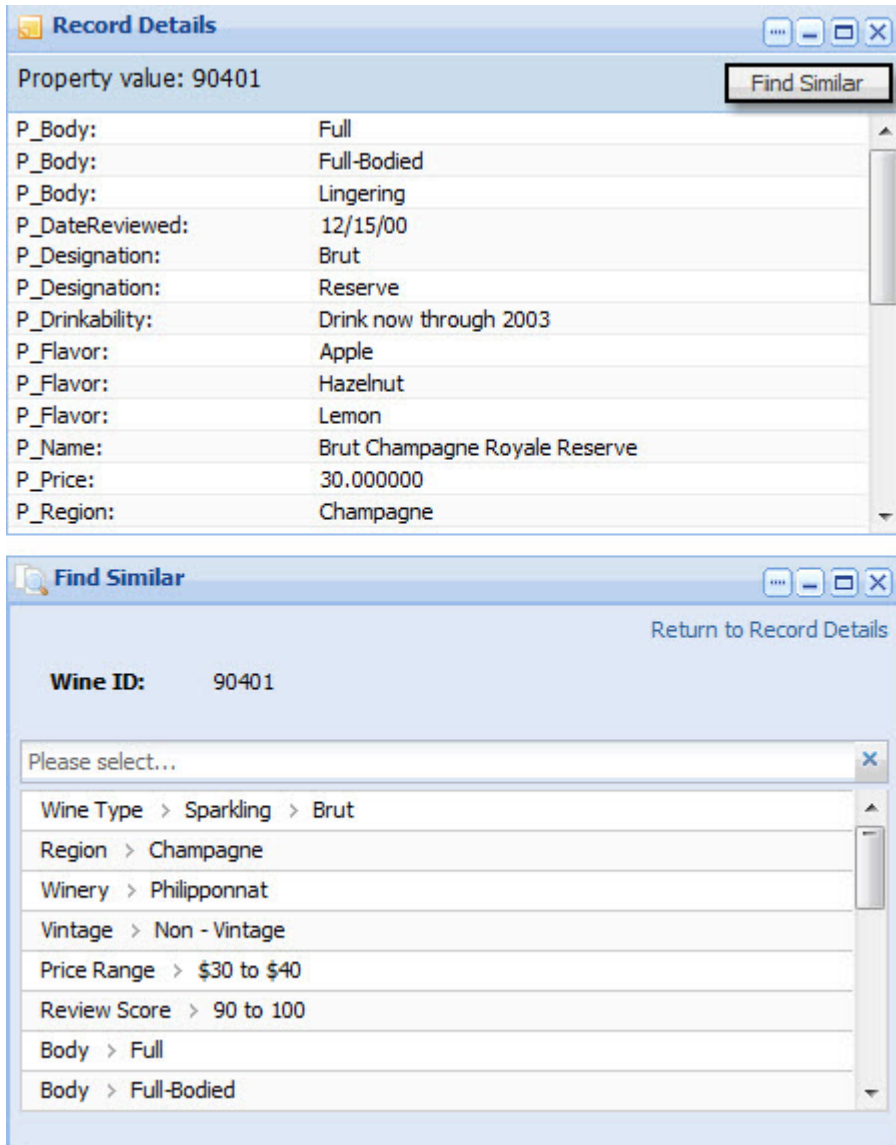
Find Similar

The **Find Similar** component provides end users with the opportunity to find other records that share common attributes with a specific record of interest.



Note: In order to use the **Find Similar** component, the **Record Details** component must be configured.

Users can view specific records of interest in the **Record Details** component and then click **Find Similar** to search for records with similar attributes. The image below shows the relationship between the **Find Similar** and **Record Details** components.



Note: The **Find Similar** component supports the use of aggregated records. For details about configuring Discovery Framework data sources for aggregated records, see the *Discovery Framework Installation Guide*.

Dependencies

The **Find Similar** component works in conjunction with the **Record Details** component.

Related Links

[Record Details](#) on page 106

The **Record Details** component displays all of the properties and dimensions for a record in the **Results Table** component.

Using Find Similar

This topic describes how an end user uses the **Find Similar** component.



Note: The **Find Similar** component must be used in conjunction with the **Record Details** component.

Once an end user has selected a record to view in the **Record Details** component, he or she clicks **Find Similar** to populate the **Find Similar** component with the record's attributes. The user then selects which attributes to search by, as shown below:

The screenshot shows the **Find Similar** component window. At the top right is a "Return to Record Details" link. Below it is a search box with the placeholder text "Please select...". A list of attributes is displayed, each with a selection icon (a small square with a dot) and a close button (an 'X' in a square). The attributes are: Wine Type > Red > Pinot Noir, Region > Bay Area - Central Coast, Vintage > 1997, Price Range > \$20 to \$30, Review Score > 80 to 90, Body > Ripe, Body > Tannins, Flavors > Berry, and Flavors > Cherry. Below this list are three sections: **Region** with a selection box containing "Bay Area - Central Coast", **Vintage** with a selection box containing "1997", and **Review Score** with a selection box containing "80 to 90". At the bottom right is a "Clear All" button. At the bottom center, it says "The search will result in 127 records." and at the bottom right is a "Submit" button.

The user can employ the search box within the **Find Similar** component to narrow the list of available attributes or to locate a specific attribute, as shown below:

The screenshot shows a search box with the text "Cherry" entered. Below the search box is a list of attributes that match the search criteria: "Flavors > Cherry".

When the user clicks **Submit**, the **Results Table** component displays all records with matching attributes:

	P_WineType	P_WineID	P_Score	P_Region
<input type="checkbox"/>	Merlot Red	76877	82	Bay Area - Central Coast
<input type="checkbox"/>	Merlot Red	76878	89	Bay Area - Central Coast
<input type="checkbox"/>	Merlot Red	76879	83	Bay Area - Central Coast
<input type="checkbox"/>	Sauvignon Blanc White	79904	87	Bay Area - Central Coast
<input type="checkbox"/>	Merlot Red	76880	82	Bay Area - Central Coast
<input type="checkbox"/>	Sauvignon Blanc White	79956	88	Bay Area - Central Coast
<input type="checkbox"/>	Red Syrah	80689	87	Bay Area - Central Coast
<input type="checkbox"/>	Sauvignon Blanc White	79957	90	Bay Area - Central Coast
<input type="checkbox"/>	Chardonnay White	74160	85	Bay Area - Central Coast
<input type="checkbox"/>	Pinot Noir Red	78282	89	Bay Area - Central Coast

The **Breadcrumbs** component is also populated with the search dimensions. The user can further refine these results using the **Guided Navigation** and **Search Box** components.

Configuring Find Similar

The power user can set the following preferences for the **Find Similar** component.

The power user can update the backing data source, add identifying headers, and customize the component's interface.

Header Fields

Display Name	Field

☒ Include all dimensions
☒ Calculate projected results
☒ Show "Return to Record Details" link

Multiselect collapse/expand threshold

3

Targeted Page

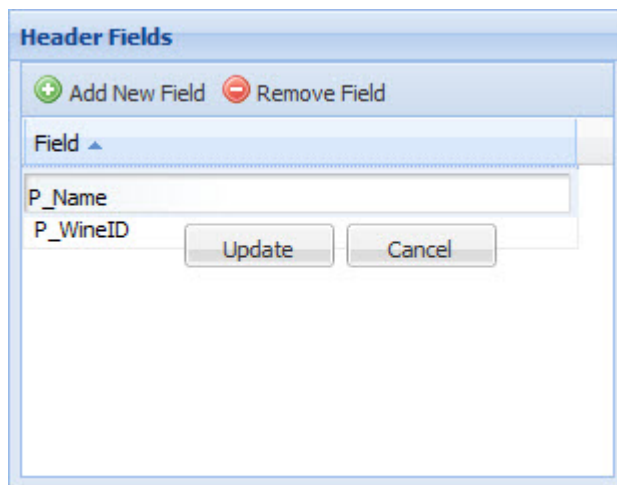
- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.



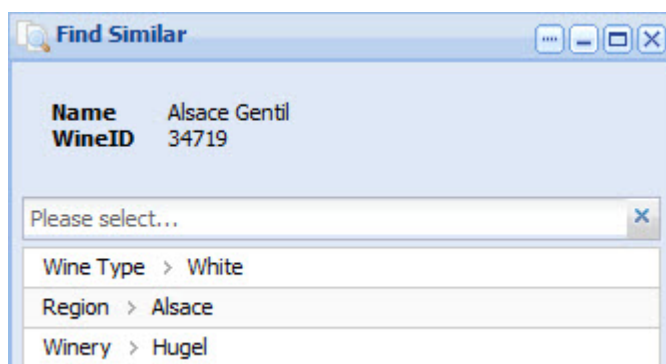
- **Header Fields:** Display property or dimension values that identify the starting record in the header of the component.



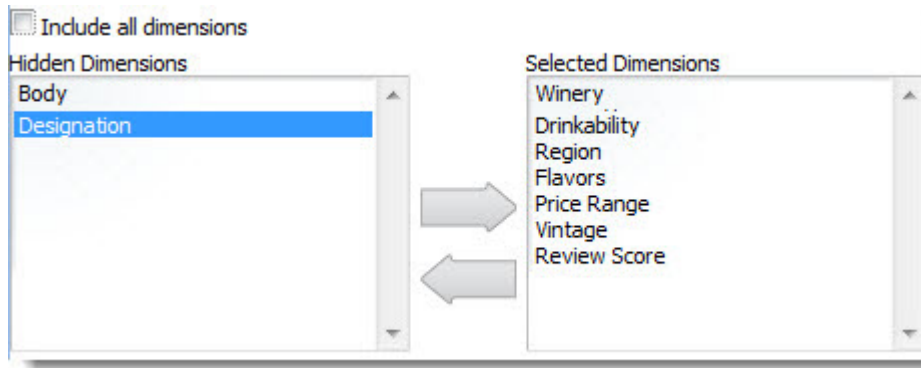
Note: To configure the display name of the property or dimension, you must use the **Attribute Settings** component.



The image below shows the **Find Similar** component with **Header Fields** configured:



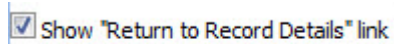
- **Include all dimensions:** When this box is checked, all dimensions are included in the **Find Similar** component. When this box is unchecked, the **Hidden Dimensions** and **Selected Dimensions** lists display, and the user can select which dimensions to hide or include.



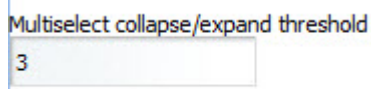
- **Calculate projected results:** Show how many similar results will be returned with the selected dimensions.



- **Show "Return to Record Details" link:** Clears the dimensions listed in the **Find Similar** component and returns the user to the **Record Details** component.



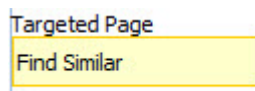
- **Multiselect collapse/expand threshold:** Sets the number of dimension values after which the list can be collapsed.



In the example below, six values are selected for the Body dimension. Because the threshold is set at 3, the user has the option to collapse the list (highlighted below).



- **Targeted Page:** Specify a separate page to display the **Find Similar** results.





Note: The target page must have a **Results Table** component.

Record detail components

The components in this section allow you to focus on the details in your data.

Related Links

[Record Details](#) on page 106

The **Record Details** component displays all of the properties and dimensions for a record in the **Results Table** component.

Record Details

The **Record Details** component displays all of the properties and dimensions for a record in the **Results Table** component.

The **Record Details** component shows all properties first, followed by all dimensions, in the order they are returned from the Presentation API (that is, alphabetically). The user cannot change this order. However, the user can edit the render configuration part of the pipeline to control which properties and dimensions are displayed.

The example below shows the relationship between the **Results Table** and **Record Details** components. Selecting a record in the **Results Table** component and clicking the **View record detail** icon (highlighted below) populates the **Record Details** component with details about the selected record.

The screenshot displays two components from the Endeca user interface. The top component, titled "Record Details", shows information for record ID 34699. It includes sections for "Ratings" (Price Range: \$10 to \$20, Review Score: 0 to 10), "Characteristics" (Body: Elegant, Firm, Firm Tannins, Polished, Supple, Tannins; Flavors: Berry, Cedar, Cherry, Coffee), and "Other" (P_WineType: Cabernet Blend, P_WineType: Red, P_Flavor: Berry, Cedar, Cherry, Coffee). The "Cabernet Blend" value is highlighted with a yellow box. The bottom component, titled "Results Table", shows a table of search results. The first row, "Cabernet Blend Red", is highlighted with a yellow box. The table has columns for P_WineType, P_Name, P_Score, and P_Region. The bottom of the interface shows pagination information: "Page 1 of 5708", "Records per page", and "Displaying records 1 - 10 of 57076".

Record Details

34699

Ratings

Price Range: \$10 to \$20

Review Score: 0 to 10

Characteristics

Body: Elegant

Body: Firm

Body: Firm Tannins

Body: Polished

Body: Supple

Body: Tannins

Flavors: Berry

Flavors: Cedar

Flavors: Cherry

Flavors: Coffee

Other

P_WineType: Cabernet Blend

P_WineType: Red

P_Flavor: Berry

P_Flavor: Cedar

P_Flavor: Cherry

P_Flavor: Coffee

Results Table

Choose a column set: Tab 1 Tab 2

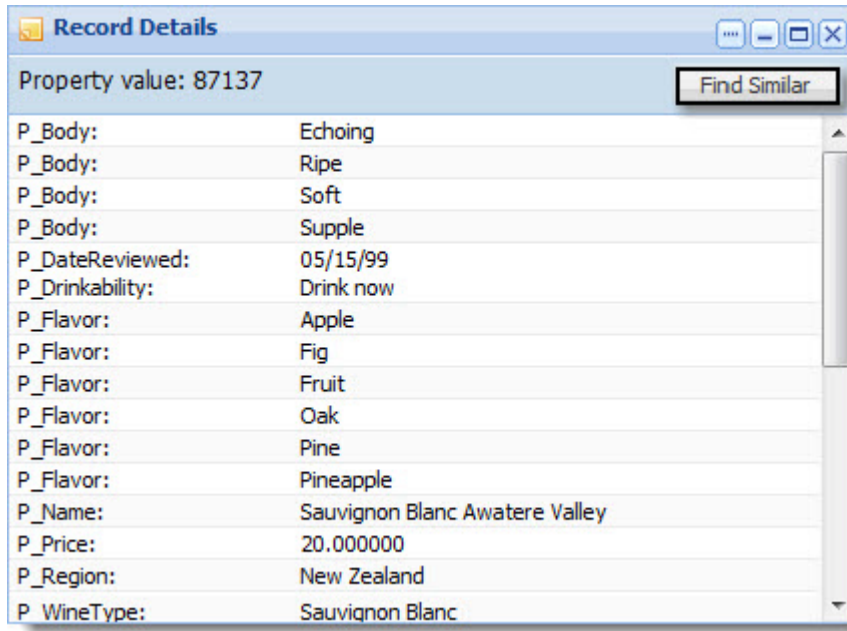
	P_WineType	P_Name	P_Score	P_Region
<input checked="" type="checkbox"/>	Cabernet Blend Red	A Red Blend Alexander Valley	5	Sonoma
<input type="checkbox"/>	Sauvignon Blend White	A Tribute White Sonoma Mour	15	Sonoma
<input type="checkbox"/>	White	Albarino Rias Baixas	25	Spain
<input type="checkbox"/>	Semillon-Sauvignon Blanc Whi	Alchemy Mendocino County	35	Mendocino Lake
<input type="checkbox"/>	White	Alsace Gentil	83	Alsace
<input type="checkbox"/>	Burgundy Cote de Beaune W	Meursault Les Cras	88	Burgundy
<input type="checkbox"/>	White	Alella Marques de Alella Clasio	76	Spain
<input type="checkbox"/>	White	Alsace Grand Cru Kaefferkopf	84	Alsace
<input type="checkbox"/>	Burgundy Cote de Beaune W	Meursault Les Cras	74	Burgundy
<input type="checkbox"/>	Alenquer Red	Alenquer	87	Portugal

Page 1 of 5708 Records per page Displaying records 1 - 10 of 57076

Dependencies

The **Record Details** component must be used with the **Results Table** component, because only the **Results Table** provides the required detail links. However, as long as a page transition is specified, the two components do not have to reside on the same page.

The **Record Details** component also works in conjunction with the **Find Similar** component. When a record is displayed in **Record Details**, the user can click the **Find Similar** button (highlighted below) to search through records with similar attributes.



Note: The **Record Details** component supports the use of aggregated records. For details about configuring Discovery Framework data sources for aggregated records, see the *Discovery Framework Installation Guide*.

Related Links

[Results Table](#) on page 69

The **Results Table** component provides a simple interface for displaying results. The **Results Table** component can show results from Analytics and non-Analytics queries.

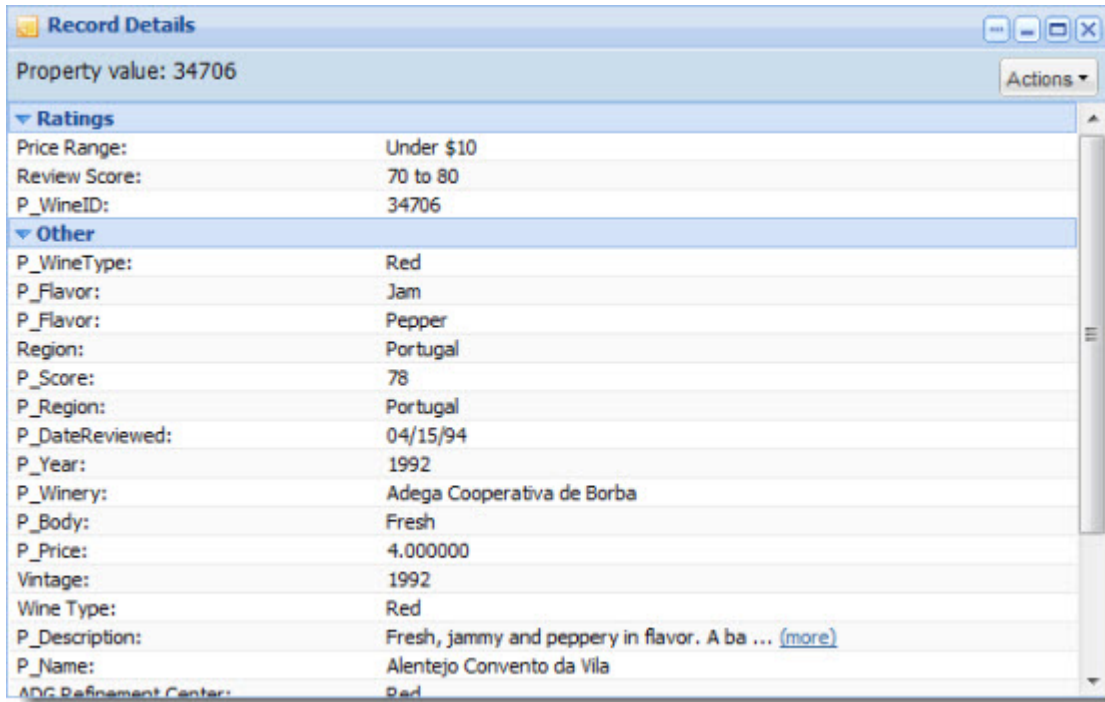
[Find Similar](#) on page 100

The **Find Similar** component provides end users with the opportunity to find other records that share common attributes with a specific record of interest.

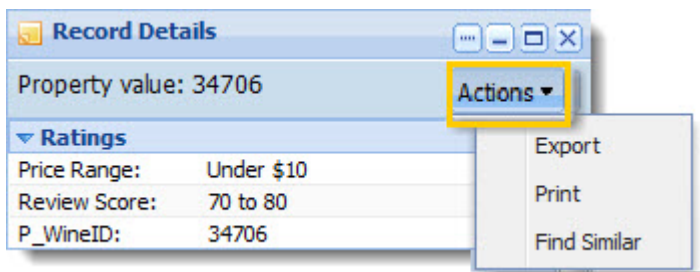
Using Record Details

This topic describes how an end user can use the **Record Details** component.

You can use the **Record Details** component to view all properties associated with the selected record.



The **Record Details** component's **Actions** button allows the end user to select from the options the power user has enabled. The full set of available options included **Export**, **Print**, and **Find Similar**.



The user can also use the **Record Details** component to find records with similar attributes to the one on display. When a record is displayed in the **Record Details** component, the user can click **Find Similar** to search through records with similar attributes to the record of interest. The relationship between the **Record Details** and **Find Similar** components is shown below:

The image shows two overlapping windows from the Endeca Discovery Framework. The top window, titled "Record Details", displays property information for a wine record with ID 34706. It is organized into two sections: "Ratings" and "Other". The "Ratings" section shows a Price Range of "Under \$10", a Review Score of "70 to 80", and the P_WineID of "34706". The "Other" section lists various attributes including P_WineType (Red), P_Flavor (Jam), P_Flavor (Pepper), Region (Portugal), P_Score (78), P_Region (Portugal), P_DateReviewed (04/15/94), P_Year (1992), P_Winery (Adega Cooperativa de Borba), P_Body (Fresh), P_Price (4.000000), Vintage (1992), Wine Type (Red), P_Description (Fresh, jammy and peppery in flavor. A ba ... [\(more\)](#)), P_Name (Alentejo Convento da Vila), and ADG Refinement Center (Red). An "Actions" dropdown menu is visible in the top right corner.

The bottom window, titled "Find Similar", contains a search interface. It has a text input field with the placeholder "Please select..." and a list of filters below it. Each filter is preceded by a right-pointing arrow, indicating it is a dropdown menu. The filters are: Wine Type > Red, Region > Portugal, Winery > Adega Cooperativa de Borba, Vintage > 1992, Price Range > Under \$10, Review Score > 70 to 80, Body > Fresh, Flavors > Jam, and Flavors > Pepper.



Note: To make use of this functionality, the **Find Similar** component must be added to some page in the Discovery Framework.

Configuring Record Details

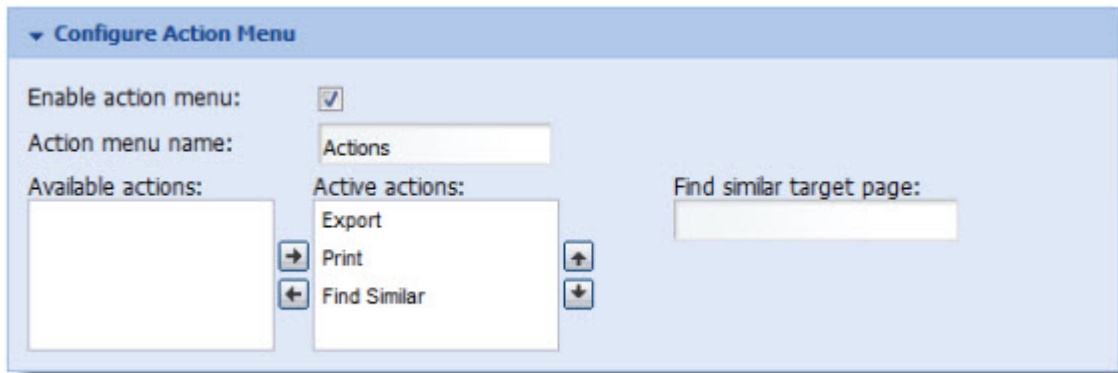
The power user can set the following preferences for the **Record Details** component.

The power user can define the format and the attribute sets to be displayed.

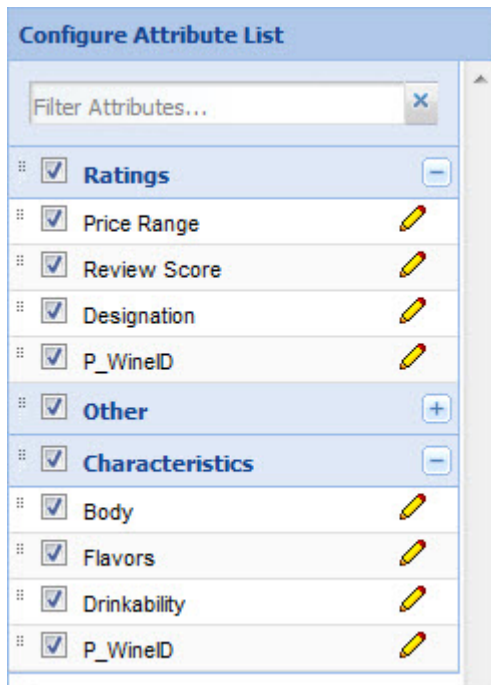
- **Data source controls:** Select from the available data sources in the drop-down list, and then click **Update data source** to bind your selection to the component.



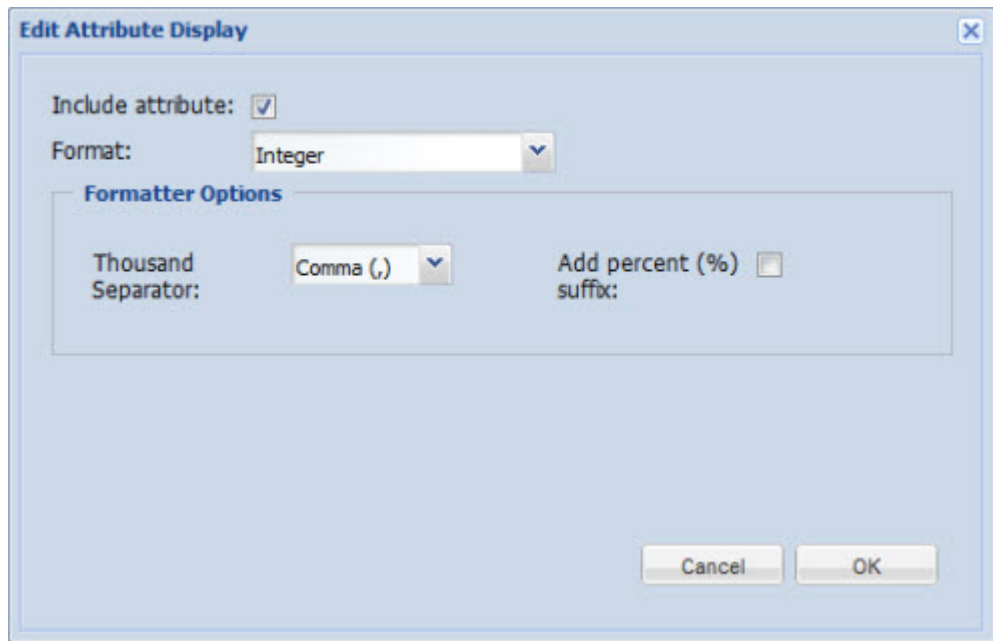
- **Configure Action Menu:** Configure the actions that your end users can access when they click Actions. Available options include:
 - **Export**, which allows the user to export the record details to Excel. The single record is exported in CSV format that displays the record as a single Excel row.
 - **Print**, which displays the record details in another browser window. The end user prints as usual via the **File** menu or keyboard shortcut.
 - **Find Similar**, which launches the **Find Similar** component for the record in question. Optionally, you can specify a different page as the target for **Find Similar**.



- **Configure Attribute List:** Select the attributes to displayed to the end user. The power user can search for an attribute by name (with type-ahead), as well as check and uncheck attributes and attribute sets directly.

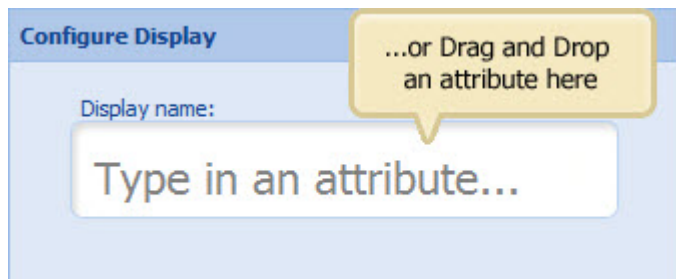


Clicking  for any attribute opens the **Edit Attribute Display** dialog box, where the power user can set the formatting for that attribute.



The **Edit Attribute Display** dialog box is shown. It has a title bar with a close button. Inside, there is a section for 'Include attribute:' with a checked checkbox. Below that is a 'Format:' dropdown menu currently set to 'Integer'. A 'Formatter Options' section contains a 'Thousand Separator:' dropdown set to 'Comma (,)' and an 'Add percent (%) suffix:' checkbox which is unchecked. At the bottom right are 'Cancel' and 'OK' buttons.

- **Configure Display:** Enter the attribute to use as the display name in the end user's view of the record, either by typing the name in the text box or dragging the attribute from the attribute list.



The **Configure Display** dialog box is shown. It has a title bar. Below the title is a 'Display name:' label and a text input field containing the placeholder text 'Type in an attribute...'. A yellow callout bubble points to the text field with the text '...or Drag and Drop an attribute here'.



Chapter 5

About Liferay components

The Discovery Framework includes a number of Liferay components in its installation by default. These components can be integrated with Endeca components to allow you to build richer applications.

Liferay component support

The level of documentation and support Endeca provides for the Liferay components included in the Discovery Framework differs from that provided for our own standard components.

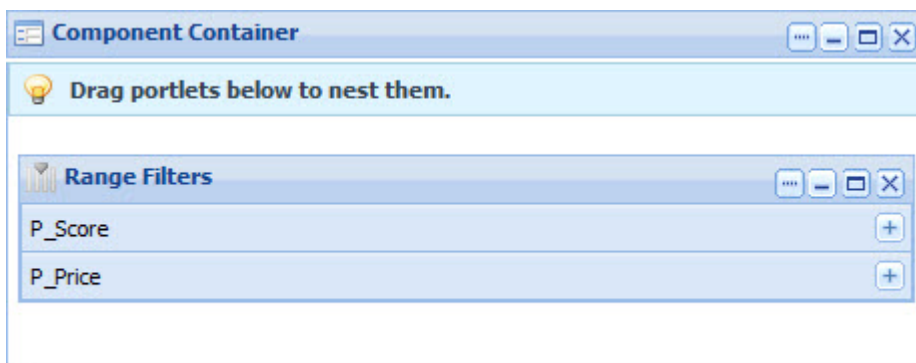
Because these components were not developed by Endeca, Endeca cannot control their interface or guarantee that they will be available in subsequent versions. Endeca provides only high-level documentation for Liferay components.

For more detailed information, consult the Liferay documentation and forums, available at <http://www.liferay.com>.

The Component Container

The **Component Container** allows power users to organize components by grouping them together in a single container.

The power user can choose from several layout templates in order to customize the display to the needs of the application.



The Languages component

The **Language** component can be used to change the locale of the server.

To select an alternate language in the **Language** component, click the flag icon associated with your target language. In the example below, we have chosen Spanish.



The Discovery Framework displays the component messages from your resource bundle in your target language. In addition, because the portal itself is also localized, menus and other portal controls also appear in your target language.



Note: For more information about localizing the Discovery Framework, see the *Discovery Framework Extension Guide*.

About Liferay Web Content Management components

Liferay Web Content Management (WCM) components can be integrated into your application to provide document management and publishing capabilities.

These components are often used together to configure, display, and save links to Web content.

Related Links

[The IFrame component](#) on page 115

The **IFrame** component provides an inline frame that can embed a separate Web document.

[The Links component](#) on page 116

The **Links** component allows users to save and manage their own Web content links in folders.

[The Web Content component](#) on page 116

The **Web Content** component allows the power user to configure and manage the administrative aspects of Liferay Web Content Management.

[The Web Content Display component](#) on page 117

The **Web Content Display** component allows you to request and display articles in your application.

[The Web Content List component](#) on page 117

The **Web Content List** component displays a list of all Web content articles that are available in the application.

[The Web Proxy component](#) on page 118

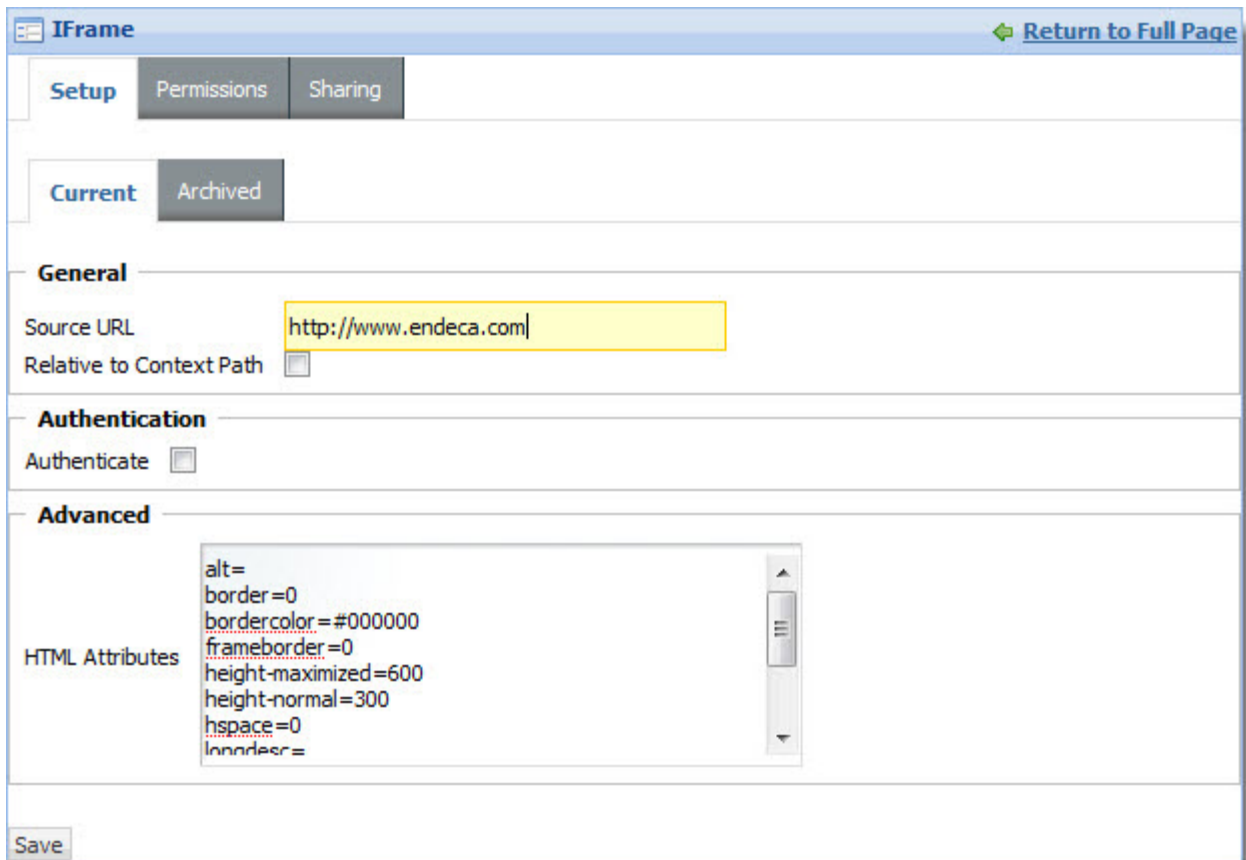
The **Web Proxy** component makes it possible to show any Web site as if it were a component.

The IFrame component

The **IFrame** component provides an inline frame that can embed a separate Web document.

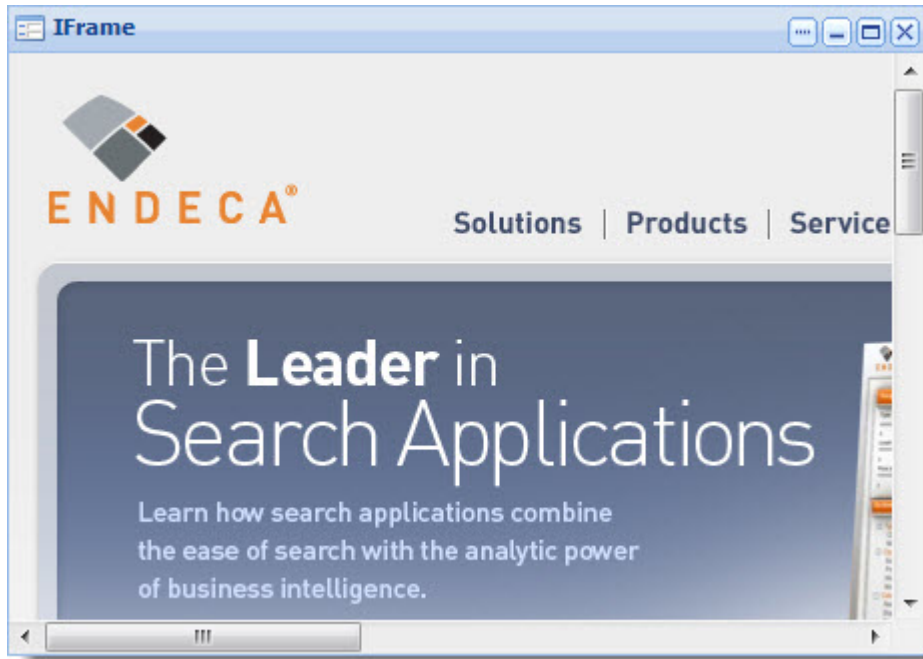
The power user can configure access and authentication, as well as modify HTML attributes that control the appearance of the output.

In the example below, the source URL is pointed at the Endeca website.



The screenshot shows the configuration interface for the IFrame component. At the top, there is a title bar with the component name "IFrame" and a "Return to Full Page" link. Below the title bar are three tabs: "Setup", "Permissions", and "Sharing", with "Setup" being the active tab. Under the "Setup" tab, there are two sub-tabs: "Current" and "Archived", with "Current" being the active sub-tab. The main configuration area is divided into three sections: "General", "Authentication", and "Advanced". In the "General" section, the "Source URL" field is highlighted in yellow and contains the text "http://www.endeca.com". Below it, the "Relative to Context Path" checkbox is unchecked. In the "Authentication" section, the "Authenticate" checkbox is unchecked. In the "Advanced" section, the "HTML Attributes" field contains a list of attributes: "alt=", "border=0", "bordercolor=#000000", "frameborder=0", "height-maximized=600", "height-normal=300", "hspace=0", and "innodesc=". A "Save" button is located at the bottom left of the interface.

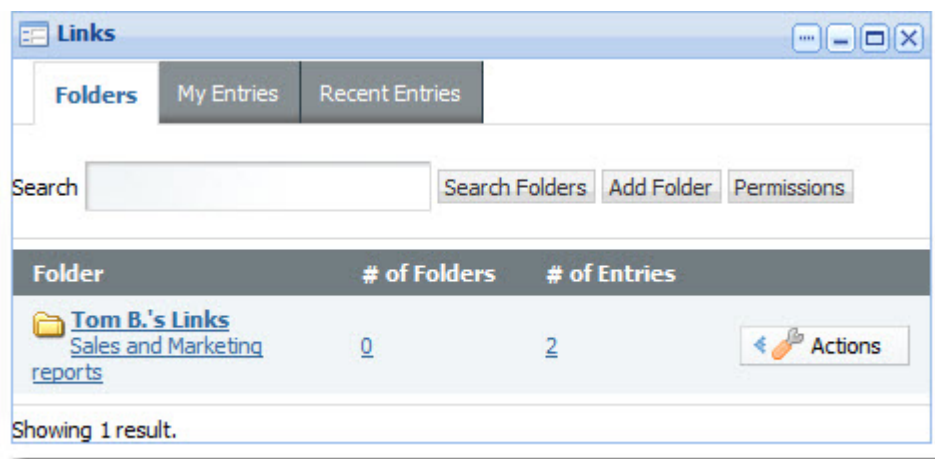
The end user sees the following:



Note: Click [here](#) for Liferay documentation on this component.

The Links component

The **Links** component allows users to save and manage their own Web content links in folders. These links can be tagged for later search and shared with other users.

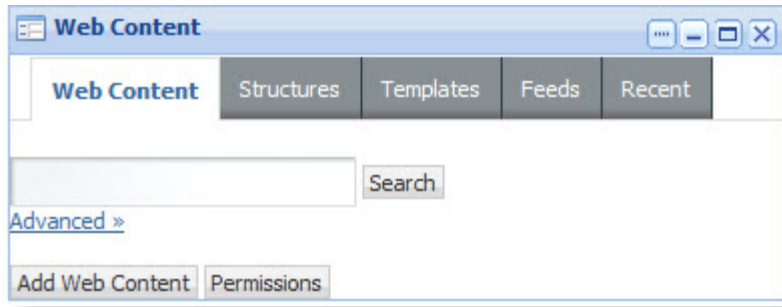


The Web Content component

The **Web Content** component allows the power user to configure and manage the administrative aspects of Liferay Web Content Management.

This includes the following:

- Enabling users to write and publish articles to the site.
- Creating article templates.
- Controlling article-creation workflow and versioning.
- Managing article search and metadata.



The content is displayed in the **Web Content Display** component.

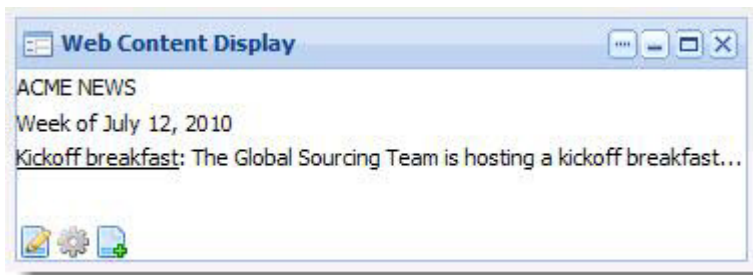


Note: Click [here](#) for Liferay documentation on this component.

The Web Content Display component

The **Web Content Display** component allows you to request and display articles in your application.

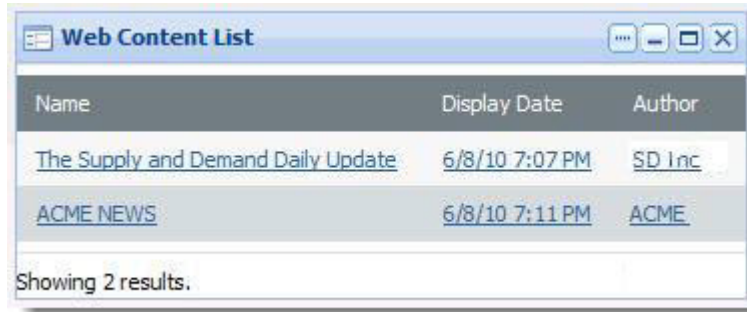
The appearance of the articles can be controlled by WCM templates, as configured in **Web Content** component.



The Web Content List component

The **Web Content List** component displays a list of all Web content articles that are available in the application.

The article list is automatically updated when new articles are made available, and can be sorted by various criteria.

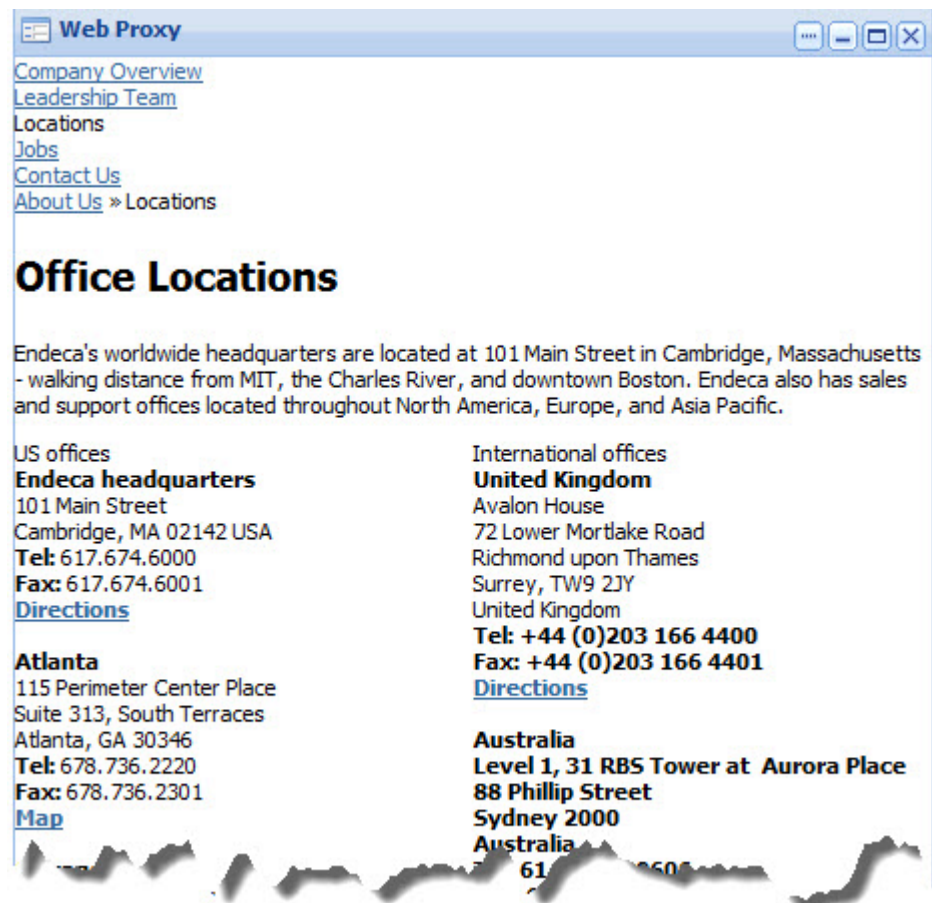


Name	Display Date	Author
The Supply and Demand Daily Update	6/8/10 7:07 PM	SD Inc
ACME NEWS	6/8/10 7:11 PM	ACME

Showing 2 results.

The Web Proxy component

The **Web Proxy** component makes it possible to show any Web site as if it were a component. The power user can configure the appearance and authentication of the content.



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[Leadership Team](#)
[Locations](#)
[Jobs](#)
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Office Locations

Endeca's worldwide headquarters are located at 101 Main Street in Cambridge, Massachusetts - walking distance from MIT, the Charles River, and downtown Boston. Endeca also has sales and support offices located throughout North America, Europe, and Asia Pacific.

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Fax: 617.674.6001
[Directions](#)

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Atlanta, GA 30346
Tel: 678.736.2220
Fax: 678.736.2301
[Map](#)

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