



ORACLE® HYPERION SMART SEARCH, FUSION
EDITION

RELEASE 11.1.1

ADMINISTRATOR'S GUIDE

ORACLE®
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

Smart Search Administrator's Guide, 11.1.1

Copyright © 2007, 2008, Oracle and/or its affiliates. All rights reserved.

Authors: EPM Information Development Team

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable: U.S. GOVERNMENT RIGHTS: Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.

Contents

| | |
|--|----|
| Chapter 1. Configuring Smart Search | 5 |
| Configuring Smart Search with Google OneBox | 5 |
| Configuring Smart Search for Oracle SES 10.1.8 | 6 |
| Configuring Smart Search for Oracle SES 10.1.8.2 | 8 |
| Configuring Register Provider | 9 |
| Configuring Embedded Search and Cluster Tree | 10 |
| Pointing Oracle SES to Smart Search | 11 |
| Chapter 2. Using Smart Search | 13 |

1

Configuring Smart Search

In This Chapter

| | |
|--|---|
| Configuring Smart Search with Google OneBox | 5 |
| Configuring Smart Search for Oracle SES 10.1.8..... | 6 |
| Configuring Smart Search for Oracle SES 10.1.8.2 | 8 |

Oracle Hyperion Smart Search, Fusion Edition works with a search engine to access Essbase metadata. Supported search engine are Google OneBox, Oracle Secure Enterprise Search (SES) Release 10.1.8, and Oracle SES Release 10.1.8.2.

Configuring Smart Search with Google OneBox

► To configure Smart Search for use with Google OneBox:

- 1 Start Administration Services Console.
- 2 To start the Smart Search provider, select **Start > Programs > Hyperion > Essbase > Smart Search > Start Essbase Provider**.
- 3 In Administration Services Console Enterprise View, right-click Google OneBox and select **Add Provider**.
- 4 Enter the server name and port number, and click **OK**.
- 5 Expand the Google OneBox node, right-click the provider name you just added, and select **Configure Provider**.
- 6 Under the Settings tab, click the **Register Provider with Google Search Appliance** link.

Note:

You may need to obtain the URL for this page from your administrator.

- 7 In the browser window that opens:
 - a. Enter the Google Search Appliance (GSA) server name or IP address, and the username and password for that server.
 - b. Enter a name for the front end, and select the checkbox **Create Frontend if not present**.
 - c. Enter a name for the OneBox module and a trigger keyword that will be used to select this module for searches.

Note:

If you select the “Overwrite OneBox module” checkbox, you will replace any existing OneBox module of the same name.

- d. Click **Register**.
- 8 In the **Settings** dialog in Administration Services Console, click **Refresh** to populate the GSA Server Name and frontend name with the information provided during [step 7](#).
- 9 **Optional:** Configure the **Selected Applications and Databases** for this server; see *Oracle Essbase Administration Services Online Help*.
- 10 Click **Apply**, and then **Close**.

Configuring Smart Search for Oracle SES 10.1.8

The following steps are necessary to configure Smart Search for use with Oracle SES 10.1.8:

- Manually register the Smart Search provider
- Set up the Smart Search provider.
- Configure the Oracle Secure Enterprise Search (SES) crawler.
- Set up the Identity Plug-In.
- Enable Support Security Agent for Single Sign-On in Oracle's Hyperion® Shared Services. Use of Smart Search with Oracle SES requires that Shared Services be enabled in Single Sign-On mode.

➤ To manually register the Smart Search provider:

- 1 **Copy** `SmartSearchCrawler.jar` from `<HYPERION_HOME>\products\Essbase\SmartSearch\hysl\CrawlerPlugin` to a subdirectory of `<SES_HOME>\search\lib\`. **Oracle recommends creating a subdirectory for this file, for example** `<SES_HOME>\search\lib\plugins\smartsearch\`
- 2 **Optional:** If using the dummy identity plug-in shipped with Smart Search, copy `HSSIdentityPlugin.jar` from `<HYPERION_HOME>\products\Essbase\SmartSearch\hysl\IdentityPlugin` to `<SES_HOME>\search\lib\identity\`.

➤ To set up the Smart Search provider:

- 1 Start Administration Services Console.
- 2 Select **Start > Programs > Hyperion > Essbase > Smart Search > Start Essbase Provider** to start the Smart Search provider.
- 3 In Administration Services Console Enterprise View, right-click **Oracle Secure Enterprise Search** and select **Add Provider**.
- 4 Add the server name and port number, and click **OK**.
- 5 Expand the **Oracle Secure Enterprise Search** node, right-click the provider name you just added, and select **Configure Provider**.

- 6 Under the **Settings** tab, click the **Launch Oracle Secure Enterprise Administration** page link.

Note:

You may need to obtain the URL for this page from your administrator.

- 7 Enter the administrator password, and click **Login**.
- 8 In the **Settings** dialog in Administration Services Console, enter the server URL, crawler schedule name, username, and password.

For more information, see *Oracle Essbase Administration Services Online Help*.

- 9 To test the search page, select **Launch Oracle Secure Enterprise Search Page**.
- 10 Click **Apply**, and then **Close**.

► To configure the Oracle SES crawler:

- 1 On the Oracle Secure Enterprise Search Administration page, select the **Search** tab at the upper right, and select **Suggested Content**.

- 2 In the Provider list, select **Create**.

- 3 Enter the following information:

- **Name:** A descriptive name for the provider, such as “Essbase Search Services.”
- **Query pattern:** A query token in the form of a Java regular expression. This will direct queries with the keyword specified to this provider. For example, to use “essbase” as a keyword, the query token would be `essbase\s(.+)`.
- **Provider URL:** In the form `<provider URL>/EssbaseSearch/Search?query=$ora:q`, where `<provider URL>` is the name of the server running the Smart Search provider.
- **Enable:** Leave this item checked.
- **XSLT Stylesheet:** A template stylesheet that is installed at `HYPERION_HOME\SmartSearch\hysl\ses.xls`. No entry is necessary unless you need to change the default settings.
- **Security Settings:** Select **Service to Service**. Enter a Shared Services username in the Entity Username text box and a Shared Services password in the Entity Password text box. In the **Format** text box, enter “username.”

- 4 Select the **Global Settings** tab at the upper right, and select **Source Types**.

- 5 Select **Create**, and enter the following values:

- **Name:** Name of your source; for example, “EssbaseSearch.”
- **Description:** A description of the source; for example, “Smart Search Source for Essbase.”
- **Plug-in Manager Java Class Name:** The Smart Search Java class name. A sample is located in `HYPERION_HOME\SmartSearch\hysl\CrawlerPlugin`. This sample needs to be placed in a subdirectory of `SES_HOME`; for example, `<SES_HOME>\search\lib\plugins\Smartsearch`. If the sample `.jar` file is used, the class name will be `com.hyperion.search.SmartSearchCrawlerPluginManager`.

- **Plug-in Jar File Name:** The Smart Search jar file name and location relative to the search \lib\plugins\ directory, for example smartsearch\SmartSearchCrawler.jar.
- 6 Select the **Home** tab, and select **Sources**.
 - 7 Select the source you named above (for example, “EssbaseSearch”) and select **Create**.
 - 8 Enter the following parameter information:
 - **Source Name:** The name of the source; for example, “EssbaseSearch.”
 - **Provider URL:** The computer name and port number for the provider; for example http://server101:16080.
 - **Hyperion Shared Services Username and Password:** Enter the Shared Services username and password.
 - 9 Select **Create**.

For more information about configuring Oracle SES, see the *Oracle Secure Enterprise Search Administrator's Guide*.

► To configure the Identity Plug-In:

- 1 Under the **Global Settings** tab, select **Identity Management Setup**, and then select **Register new Identity Plug-in**.
- 2 Enter a **Plug-in Manager Class Name** and **Plug-in Manager Jar File Name** in the text boxes.
A sample file is provided, `HYPERION_HOME\SmartSearch\hysl\IdentityPlugin\HSSIdentityPlugin.jar`. If the sample jar file is used, the class name must be `com.test.HSSPluginManager`.

Note:

This file should not be used in a production environment. It provides no authentication verification.

- 3 Click **Finish**.
- 4 On the **Activate Identity Plug-in** screen, click **Activate**.
- 5 In the **Authentication Attribute** drop-down box, select “Username,” and then click **Finish**.

► To enable Support Security Agent for Single Sign-on:

- 1 Open Shared Services User Management Console.
- 2 Right-click **User Directories**.
- 3 Select **Configure User Directories**.
- 4 Select the **Support Security Agent for Single Sign-on** check box.
- 5 Close the User Management Console.

Configuring Smart Search for Oracle SES 10.1.8.2

Configuring Register Provider

Note:

Register Provider is only supported for Oracle SES release 10.1.8.2 and later.

► To configure Register Provider:

- 1 Copy** `SmartSearchCrawler.jar` from `<HYPERION_HOME>\products\Essbase\SmartSearch\hysl\CrawlerPlugin` to a subdirectory of `<SES_HOME>\search\lib\`. Oracle recommends creating a subdirectory for this file, for example `<SES_HOME>\search\lib\plugins\smartsearch\`
- 2 Optional: If using the dummy identity plug-in shipped with Smart Search, copy** `HSSIdentityPlugin.jar` from `<HYPERION_HOME>\products\Essbase\SmartSearch\hysl\IdentityPlugin` to `<SES_HOME>\search\lib\identity\`.
- 3 In a browser, enter the following URL:** `http://<SmartSearchProvider>:<port>/EssbaseSearch/RegisterProvider` (example: `http://localhost:16080/EssbaseSearch/RegisterProvider`)
- 4 Enter configuration information into the appropriate fields:**
 - **Server Configuration:** Enter SES URL, administrator username, and password.
 - **Source Type Configuration:** Enter Smart Search description, optionally including the jar file name from [step 1](#).
 - **Search Source Configuration:** Enter Smart Search server URL in the form `http://hostname:port_number` and Shared Services username and password.
 - **Schedule configuration:** Enter the name of the crawler schedule.
 - **Optional: Dummy Identity Plug-In Configuration:** If using the dummy identity plug in, select the **Configure Dummy Identity Plugin** and **Activate Plugin** check boxes and enter the jar file name from [step 2](#).
- 5 Click Register.**

► To add Essbase source type:

- 1 In the Global Settings tab, select Source Types.**
- 2 Click Create, and enter required information including the following:**
 - **Plug-in Manager Java Class Name:** Enter the Smart Search Java class name, for example `com.hyperion.search.SmartSearchCrawlerPluginManager`.
 - **Plug-in Jar File Name:** Enter the Smart Search jar file name and location relative to the `search\lib\plugins\` directory, for example `smartsearch\SmartSearchCrawler.jar`.
- 3 Click Next, and then Finish.**
- 4 In the Home tab, select Sources and select the source type you just created, then click Create.**

- 5 Enter the source name, the URL of the Smart Search provider service in the form `http://hostname:port`, and the Shared Services username and password, and click **Create**.
- 6 **Optional:** In the **Home** tab, select **Sources**, and then **Edit**.
- 7 **Optional:** In the Edit User-Defined Sources screen, edit the following parameters if necessary to increase system resources.
 - **Number of Crawler Threads:** Increase if you plan to index a large number of applications.
 - **Crawler Timeout Threshold (Seconds):** Increase if indexing an extremely large outline.
 - **Maximum Document Size (megabytes):** Increase if indexing an extremely large outline.

Configuring Embedded Search and Cluster Tree

➤ To configure embedded search:

- 1 Navigate to **Global Settings**, and then **Configure Search Result List**.
- 2 Select **Use Advanced Configuration**.
- 3 Ensure that the Included list contains the following attributes:
 - ESSBASE_URL
 - Url
 - eqsnippet
 - equerquery
- 4 Using a text editor, create a backup copy of the style sheet.
- 5 From the directory to which Smart Search was installed, open `hysl\ses_globalconfig.xml` in a text editor.
- 6 Replace all instances of `http://localhost:16080` with the URL of the Smart Search server, including port number.
- 7 Paste the modified contents of `hysl\ses_globalconfig.xml` into the style sheet text box, and click **Apply**.

➤ To configure the cluster tree:

- 1 Navigate to **Global Settings**, and then **Clustering Configuration**.
- 2 If necessary for your configuration, modify the **Clustering parameter** and the **Minimum number of documents per node**. For information, see the *Oracle Secure Enterprise Search Administrator's Guide*.
- 3 Create a new cluster tree of type metadata, and set the parameters as follows:
 - Set cluster tree name to Essbase servers
 - Select “ESSBASE_URL” attribute
 - Set Hierarchy delimiter to any character
- 4 Click **Apply**.

Pointing Oracle SES to Smart Search

- To configure a Smart Search provider for Oracle SES:
 - 1 In the Oracle SES administration interface, select the **Search** tab, and then **Suggested Content**.
 - 2 Click **Create**, and enter information for the new provider as follows:
 - **Name:** Name for this provider
 - **Query Pattern:** Java regular expression for the trigger keyword. For example, if “essbase” is the keyword, the regex will be `essbase\s(.+)`.
 - **Provider URL:** Location of the Smart Search provider. For example, `http://hostname:port_number/EssbaseSearch/Search?query=$ora:q`
 - **Enable:** Select this check box.
 - **XSLT Spreadsheet:** A sample can be found in the `release\hysl\ses.xsl` subdirectory of the Smart Search installation directory.
 - 3 On the same page, configure the security settings as follows:
 - **Entity Name and Password:** Enter your Oracle's Hyperion® Shared Services username and password.
 - **Format:** Leave blank.
 - 4 Click **Create**.

2

Using Smart Search

Using Smart Search is similar to using Google. Users receive a URL for the front end search page and one or more keywords to access the Smart Search provider.

► To use Smart Search:

1 Enter the URL for the Smart Search front end into your browser.

If you will be using Smart Search frequently, bookmark the page.

2 Enter the trigger keyword (for example, “essbase”), followed by the word or words you wish to search on, and click **Search.**

Note:

If no keyword is entered in the text box, no data grids are included in the Google search results. This is normal behavior for the Google Search Appliance.

3 Do one of the following:

- If using Smart Search with Google OneBox, enter an Oracle Essbase or Shared Services username and password, and click **OK**. This will only be necessary for your first query during a session.
- If using Oracle Hyperion Smart Search, Fusion Edition with Oracle SES, select the **Login** link to launch a Login page for Oracle Secure Enterprise Search. Enter a Shared Services username and password, and click **Login**.

4 Review your search results. Click any link for more information.

- Search results with data grids will display up to 12 rows of data in the grid, and a link. Clicking the link will display the results in a spreadsheet. If Oracle Hyperion Smart View for Office, Fusion Edition is installed, the spreadsheet will be opened with Smart View and you will be able to perform further ad-hoc analysis on the data. Otherwise, the results will display in an Excel spreadsheet, and ad-hoc analysis using Oracle Hyperion Smart View for Office, Fusion Edition is not available.
- If keywords are present in an outline, the results will display the portion of the outline containing the search keywords, and clicking the link will launch a data grid in Excel.
- If keywords are present in a report script or calc script, a summary of the script content will be displayed. Clicking the link will launch a browser displaying the report script with keywords highlighted. Clicking the **Execute Script** link in this window will execute the report or calc script and display results in a new browser window.

- If keywords are present in a linked reporting object (LRO), summary results will be displayed. Clicking the link will launch a browser window displaying all of the LROs in the application. URL links in an LRO can be clicked and launched.
 - Clicking a **Show graph** link will launch a browser window containing a graph of the outline results.
- ▶ To create a query containing a conditional expression:
- 1 Enter the expression into the search box. For example, `essbase Sales > 222`.
 - 2 Click **Help me construct Query**.
 - 3 In the page that opens, use the fields and buttons provided to construct your query:
 - Construct conditions using the **Filter Expressions** text and drop down boxes.
 - Click **Add Expression** to add the current Filter Expression to the query.
 - Click **And** or **Or** to connect the expressions in the query logically.
 - 4 When the query is complete, click **Preview** or **Search** to execute the search.