

IDOL Server

Software Version 12.x

IDOL 12 Upgrade Technical Note



Document Release Date: July 2018
Software Release Date: June 2018

Legal notices

Copyright notice

© Copyright 2016-2018 Micro Focus or one of its affiliates.

The only warranties for products and services of Micro Focus and its affiliates and licensors ("Micro Focus") are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. Micro Focus shall not be liable for technical or editorial errors or omissions contained herein. The information contained herein is subject to change without notice.

Trademark notices

Adobe™ is a trademark of Adobe Systems Incorporated.

Microsoft® and Windows® are U.S. registered trademarks of Microsoft Corporation.

UNIX® is a registered trademark of The Open Group.

Documentation updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

To verify you are using the most recent edition of a document, go to

[https://softwaresupport.softwaregrp.com/group/softwaresupport/search-result?doctype=online help](https://softwaresupport.softwaregrp.com/group/softwaresupport/search-result?doctype=online+help).

You will also receive new or updated editions of documentation if you subscribe to the appropriate product support service. Contact your Micro Focus sales representative for details.

To check for new versions of software, go to <https://www.hpe.com/software/entitlements>. To check for recent software patches, go to <https://softwaresupport.softwaregrp.com/patches>.

The sites listed in this section require you to sign in with a Software Passport. You can register for a Passport through a link on the site.

Support

Visit the Micro Focus Software Support Online website at <https://softwaresupport.softwaregrp.com>.

This website provides contact information and details about the products, services, and support that Micro Focus offers.

Micro Focus online support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the support website to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Access the Software Licenses and Downloads portal
- Download software patches
- Access product documentation
- Manage support contracts
- Look up Micro Focus support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require you to register as a Passport user and sign in. Many also require a support contract.

You can register for a Software Passport through a link on the Software Support Online site.

To find more information about access levels, go to

<https://softwaresupport.softwaregrp.com/web/softwaresupport/access-levels>.

Contents

Introduction	5
Licenses	6
IDOL NiFi Ingest	7
Connectors	8
Upgrade the Text Index	9
Upgrade from IDOL 11.x	9
Upgrade from IDOL 10.x	9
Upgrade from IDOL 7.x	9
Upgrade the Content Component	11
Other Recommended Updates	11
Service Scripts	12
Media Server	13
JSON Response Formats	14
Authorization Roles	15
Send documentation feedback	17

Introduction

IDOL 12 represents a significant advance in the progression of IDOL Server. Many of the changes encapsulate the functional and architectural improvements and optimizations in the product over recent years. It also includes some significant new functionality and architectural changes, including:

- **IDOL NiFi Ingest.** NiFi Ingest is a new way to configure and manage your ingestion stream, by using an Apache NiFi user interface. It is intended as an alternative to the Connector Framework Server. See [IDOL NiFi Ingest, on page 7](#).
- **IDOL Audio Analysis** functionality is now available in Media Server, so that you do not need to install IDOL Speech Server separately. See [Media Server, on page 13](#).

NOTE:

As a result of this change, IDOL Speech Server is not available separately in version 12.x.

- **IDOL Text Index Encryption.** You can now encrypt your IDOL text data index, using AES encryption. See [Upgrade the Text Index, on page 9](#).

The simplest way to obtain the new functionality is to create a fresh install of IDOL 12, and activate any functionality that is appropriate for your use case. In some cases, you can perform upgrades of individual components.

The following sections describe some of the things you must consider when you upgrade from IDOL 11.x to 12.x.

For information about general IDOL Server component upgrades, refer to *IDOL Expert*.

Licenses

In general, upgrading from IDOL Server version 11.x to 12.x does not require a new license. However, some new functionality available in IDOL 12.x requires an updated license.

If you have an OEM license, you must obtain a new license for IDOL 12.x.

IDOL Server version 10.0.0 and later cannot be run using an IDOL7 license. Please contact Autonomy support to obtain an IDOL10 license.

IDOL NiFi Ingest

The IDOL 12.x framework includes IDOL NiFi Ingest.

IDOL NiFi Ingest is a new way to plan and configure your ingestion stream. It uses Apache NiFi to allow you to easily configure and manipulate your data ingest process, from your connectors, to KeyView and other import processes (such as media analysis and Education), and your IDOL index.

NiFi Ingest is intended as an alternative to the Connector Framework Server (CFS). You can run any IDOL 12.x connector with either CFS or NiFi Ingest.

To update your system to use IDOL NiFi Ingest, you must install the new framework and update your connectors to point to the new ingestion stream.

While NiFi Ingest offers like for like functionality with CFS, there is currently no way to load a CFS configuration into it. However, designing and configuring a flow is simple and quick, and it is straightforward to implement the ingestion flow from your existing setup.

For more information, refer to the *IDOL NiFi Ingest Help*.

Connectors

You can run IDOL 12.x connectors with either Connector Framework Server (CFS) or IDOL NiFi Ingest.

To upgrade connectors with an existing CFS installation, you can install a new version of the connector and update your configuration to include your existing tasks.

To upgrade connectors to use IDOL NiFi Ingest, you must set up your ingestion stream with NiFi and then configure your connectors to send data to NiFi Ingest. For more information, refer to the *IDOL NiFi Ingest Administration Guide*.

Upgrade the Text Index

The simplest way to upgrade the IDOL Content component index is to index data into a fresh installation of IDOL 12, while also activating any further functionality that is appropriate for your use case. However, IDOL 12 is also fully compatible with existing installations and indexes, so you do not need to reindex, as long as you include certain configuration settings before you run the IDOL 12 executable.

Upgrade from IDOL 11.x

There are no new configuration changes required for compatibility when upgrading from an IDOL 11.x index to an IDOL 12.x index, unless you want to activate new functionality.

IMPORTANT:

If you want to use the new index encryption functionality with IDOL 12.x, you must reindex your data to ensure that the encryption applies to your whole index. If you turn on encryption for an existing index, Content encrypts new data in the main index, while leaving existing content unencrypted.

To ensure that all your data is encrypted, Micro Focus recommends that you reindex your data into an empty index.

For more information about index encryption, refer to the *IDOL Server Administration Guide* and the *IDOL Server Reference*.

As with all IDOL 12.x components, if you use JSON response formats, you might need to modify your front end applications, or configure the IDOL Content component to use the older response format. See [JSON Response Formats, on page 14](#).

Upgrade from IDOL 10.x

If you upgrade an existing index by replacing the IDOL 10.x executable files with newer 12.x executables, you might need to make some modifications to your configuration file.

You must add the following configuration parameter to the Content component configuration file unless a different value is already present. If you create a new IDOL index, you can ignore this step.

```
[Server]  
ParametricMaxPairsPerDocument=104858
```

Upgrade from IDOL 7.x

If you upgrade an existing index by replacing the IDOL 7.x executable files with newer 12.x executables, you might need to make some modifications to your configuration file.

You must add the following configuration parameters to the Content component configuration file unless a different value is already present. If you create a new IDOL index, you can ignore the following steps.

```
[Server]
RepositoryStorage=FALSE
SplitNumbers=TRUE
DiskHash=1000000
RefHashes=10000000
IndexFieldChecksum=TRUE
BestTermCaching=TRUE
ParametricMaxPairsPerDocument=104858
```

Upgrade the Content Component

You can update the Content component without reindexing your data to resolve issues from previous versions.

To take advantage of new features, you might need to regenerate one or more subindexes, or in some cases you might need to reindex your data. The release notes for a particular feature provide information about when this is required.

For updates that change the major version number (for example 11.x to 12.x), there might be additional changes. See [Upgrade the Text Index, on page 9](#).

TIP:

Micro Focus recommends that you back up your index and make a copy of any modified libraries and module files before you upgrade your Content component.

The following procedure describes the basic changes required to upgrade your Content component.

To upgrade the Content component

1. Stop your Content component.
2. In your Content installation directory, replace the existing `content.exe` with the new `content.exe`.
3. Update the required libraries for your platform:
 - On Microsoft Windows platforms, run any `vcredist.exe` files that are included in the Content package to install the required redistributable libraries.
 - On Linux platforms, update the `libgcc_*` and `libstdc++` runtime libraries with the versions included in the Content package.

CAUTION:

Do not modify or overwrite the following files:

- your configuration file (usually `content.cfg`)
- the contents of the directories that hold your index data (usually the `index` subfolder of the content directory, but the exact value depends on the `[Paths]` section of your configuration file).

Other Recommended Updates

When you upgrade the Content executable file, Micro Focus also recommends that you update some further supporting files as best practice.

These changes are not generally required, unless a particular feature requires it. The release notes for a particular feature provide information about when this is required.

- **Language Files.** Replace the contents of the `langfiles` folder in your installation with the version from the download package.

IMPORTANT:

If you have made any alterations to the existing stoplist files (for example `english.dat`), preserve your copy of the file. If there are changes to the default stoplist, you might want to compare the differences and merge any appropriate changes.

Micro Focus recommends that you update the sentence breaking libraries (the `.dll` or `.so` files) even if you are not using them, to ensure that they are matched with the main executable file if you enable them in future.

- **Modules.** Replace the contents of the `modules` folder in your installation with the version from the download package.

The modules include document tracking and security functionality. Micro Focus recommends that you update these files even if you are not using them, to ensure that they are matched with the main executable file if you enable them in future.

- **XSL templates.** Replace the contents of the `templates` folder, and the `autnxslt.dll` or `libautnxslt.so` file with the versions from the download package.

IMPORTANT:

If you have made any alterations to the existing XSL templates, keep your version.

- **IDOL Admin and Help Files.** Replace the `admin.dat` and `help.dat` files in your installation with the versions from the download package.

This update ensures that the IDOL Admin UI and the Help and Reference files match the version of Content that you are running.

Service Scripts

On Windows, if you have installed Content as a service, you do not need to do anything to alter it. The existing service runs the new version.

On Linux, you typically do not need to update any service or init scripts that you already use with a newer version (the files do not generally change between versions).

Media Server

Media Server version 12.x now incorporates the audio analysis functionality so that you do not need to install IDOL Speech Server separately. As a consequence, IDOL Speech Server is not available separately for versions of IDOL after 11.x.

These changes mean that IDOL Media Server 12.0 has significant changes to the configuration and installation files to incorporate the audio analysis functionality. To upgrade Media Server to 12.x, you must create a new installation of the component, and update the configuration file to include any functionality that is appropriate for your use case.

JSON Response Formats

IDOL 12.x includes changes to the standard JSON response format that IDOL components use.

The new version of the JSON response format returns single-element lists as arrays, for consistency with multiple-element lists.

There is also a new **simplejson** format, which omits `auth:` prefixes in node names, and does not use `$` nodes to represent XML nodes unless the equivalent XML node contains attributes.

The `ResponseFormat` standard action parameter has several new options to allow you to use these new formats, or the older formats. There is also a configuration parameter, `JSONFormat`, to allow you to choose the option to use when you set `ResponseFormat` to **json** (the existing value).

In the default IDOL component configuration for IDOL 12.x, setting `ResponseFormat` to **json** uses the new response format. If you use a custom user interface with IDOL, you might need to update it to use the new format, or modify your IDOL configuration to enable compatibility mode.

To configure your IDOL components to use a compatibility mode that uses the older JSON format, set the following value in the component configuration file:

```
[Server]
JSONFormat=json/0
```

For more information about JSON response formats, refer to your component Reference.

NOTE:

The standard IDOL user interfaces, such as Find, IDOL Data Admin, IDOL Admin, and IDOL Site Admin, have been updated to accept both the new and the old JSON format. You must upgrade these interfaces to 12.x if you want to use the new formats.

Authorization Roles

IDOL 11.4 introduced a new way of specifying user permissions for your IDOL components, in the Authorization Roles configuration. This method allows you to provide permissions to users based on client IP, SSL identity, or a GSS principal. It replaces the older client configuration (such as `AdminClients` and `QueryClients`), which allowed you to set permissions only by IP or host.

The older clients configuration method was deprecated in IDOL 11.5. Micro Focus strongly recommends that you update your system to use authorization roles when you upgrade to IDOL 12.x.

Documentation for the deprecated settings is not available in the IDOL 12.x documentation. These parameters might be removed from IDOL components in a future version.

For more information about how to configure authorization roles, refer to your component Reference and Administration Guide.

Send documentation feedback

If you have comments about this document, you can [contact the documentation team](#) by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on IDOL 12 Upgrade Technical Note (Micro Focus IDOL Server 12.x)

Add your feedback to the email and click **Send**.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to swpdl.idoldocsfeedback@microfocus.com.

We appreciate your feedback!