

WebFOCUS

WebFOCUS Integrated Installation
Release 8206

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Preface

This content describes how to install WebFOCUS Integrated Installation on Windows[®] and Linux operating systems. This documentation is intended for system administrators with knowledge of Windows and Linux operating systems.

How This Manual Is Organized

This manual includes the following chapters:

Chapter/Appendix	Contents
1 WebFOCUS Integrated Installation	Introduces and provides step-by-step instructions that you need to install WebFOCUS Integrated Installation on a Windows or Linux environment.
2 Solr Installation and Configuration	Describes how to configure Solr, an open-source, high-performance, full-featured enterprise-search platform.

Conventions

The following table describes the conventions that are used in this manual.

Convention	Description
<code>THIS TYPEFACE</code> or <code>this typeface</code>	Denotes syntax that you must enter exactly as shown.
<i>this typeface</i>	Represents a placeholder (or variable), a cross-reference, or an important term.
<u>underscore</u>	Indicates a default setting.
Key + Key	Indicates keys that you must press simultaneously.
{ }	Indicates two or three choices. Type one of them, not the braces.
[]	Indicates a group of optional parameters. None is required, but you may select one of them. Type only the parameter in the brackets, not the brackets.

Convention	Description
	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
...	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).
. . .	Indicates that there are (or could be) intervening or additional commands.

Related Publications

Visit our Technical Content Library at <http://documentation.informationbuilders.com>. You can also contact the Publications Order Department at (800) 969-4636.

Customer Support

Do you have any questions about this product?

Join the Focal Point community. Focal Point is our online developer center and more than a message board. It is an interactive network of more than 3,000 developers from almost every profession and industry, collaborating on solutions and sharing tips and techniques. Access Focal Point at <http://forums.informationbuilders.com/eve/forums>.

You can also access support services electronically, 24 hours a day, with InfoResponse Online. InfoResponse Online is accessible through our website, <http://www.informationbuilders.com>. It connects you to the tracking system and known-problem database at the Information Builders support center. Registered users can open, update, and view the status of cases in the tracking system and read descriptions of reported software issues. New users can register immediately for this service. The technical support section of www.informationbuilders.com also provides usage techniques, diagnostic tips, and answers to frequently asked questions.

Call Information Builders Customer Support Services (CSS) at (800) 736-6130 or (212) 736-6130. Customer Support Consultants are available Monday through Friday between 8:00 a.m. and 8:00 p.m. EST to address all your questions. Information Builders consultants can also give you general guidance regarding product capabilities. Please be ready to provide your six-digit site code number (xxxx.xx) when you call.

To learn about the full range of available support services, ask your Information Builders representative about InfoResponse Online, or call (800) 969-INFO.

Information You Should Have

To help our consultants answer your questions effectively, be prepared to provide the following information when you call:

- Your six-digit site code (xxxx.xx).
- Your WebFOCUS configuration:
 - The front-end software you are using, including vendor and release.
 - The communications protocol (for example, TCP/IP or HLLAPI), including vendor and release.
 - The software release.
 - Your server version and release. You can find this information using the Version option in the Web Console.
- The stored procedure (preferably with line numbers) or SQL statements being used in server access.
- The Master File and Access File.
- The exact nature of the problem:
 - Are the results or the format incorrect? Are the text or calculations missing or misplaced?
 - Provide the error message and return code, if applicable.
 - Is this related to any other problem?
- Has the procedure or query ever worked in its present form? Has it been changed recently? How often does the problem occur?
- What release of the operating system are you using? Has it, your security system, communications protocol, or front-end software changed?
- Is this problem reproducible? If so, how?
- Have you tried to reproduce your problem in the simplest form possible? For example, if you are having problems joining two data sources, have you tried executing a query containing just the code to access the data source?

- Do you have a trace file?
- How is the problem affecting your business? Is it halting development or production? Do you just have questions about functionality or documentation?

User Feedback

In an effort to produce effective documentation, the Technical Content Management staff welcomes your opinions regarding this document. You can contact us through our website, <http://documentation.informationbuilders.com/connections.asp>.

Thank you, in advance, for your comments.

Information Builders Consulting and Training

Interested in training? Information Builders Education Department offers a wide variety of training courses for this and other Information Builders products.

For information on course descriptions, locations, and dates, or to register for classes, visit our website (<http://education.informationbuilders.com>) or call (800) 969-INFO to speak to an Education Representative.

WebFOCUS Integrated Installation

WebFOCUS Integrated Installation is a new, simplified installation. It installs and configures all required product components to allow you to use the product for your reporting and analytics needs.

In this chapter:

- ❑ [Introducing WebFOCUS Integrated Installation](#)
 - ❑ [Installing WebFOCUS Integrated Installation](#)
-

Introducing WebFOCUS Integrated Installation

This topic provides an overview of WebFOCUS Integrated Installation.

WebFOCUS Integrated Installation Components

WebFOCUS Integrated Installation is an all-in-one downloadable installation package. Benefits include:

- ❑ WebFOCUS and the Reporting Server bundled with Tomcat, Derby, Java, and Solr.
- ❑ Hyperstage preconfigured as a high-speed target for uploaded data.
- ❑ Simplified configuration for email distribution.

With WebFOCUS Integrated Installation, you can quickly and easily perform the following functions, all in a single web-based environment.

Reporting and Analysis

Create ad hoc queries, develop reports, charts, documents, and other analytic views for personal usage, or sharing and distribution in static or interactive formats. You can also create more advanced information assets, such as multi-page analytic documents and multi-source dashboards.

Data Discovery

Explore your data to find trends, patterns, and gain new insight by creating visualizations. Running against a high-speed data sandbox and other data sources, you can create interactive visualizations that can be saved, shared, published, and delivered as PowerPoint presentations to help you build business cases through storytelling.

Scheduling and Distribution

ReportCaster provides scheduling and distribution capabilities for reports and procedures, as well as independent files and URLs. Reports and files are automatically distributed on a monthly, weekly, daily, or specific basis.

Installing WebFOCUS Integrated Installation

This topic provides the step-by-step instructions that you need to install WebFOCUS Integrated Installation on a Windows or Linux environment.

Installing WebFOCUS Integrated Installation on a Windows Environment

The following section describes how to install WebFOCUS Integrated Installation on a Windows environment.

You can begin using WebFOCUS Integrated Installation immediately after you install the product. No additional configuration steps are required.

WebFOCUS Integrated Installation System Requirements for Windows

To install WebFOCUS Integrated Installation, you must have administrator privileges. Additionally, your machine must meet the following system requirements defined in *Hardware Requirements* and *Software Requirements*.

Hardware Requirements

- 4-core processor, 2.5 GHz minimum per core. 8-core processors are recommended for better performance.
- 16 GB of RAM or higher is recommended for optimal performance.
- 10 GB of free disk space.
- Ensure that the Windows page file is properly configured and that is set to *Automatically manage paging file size*. For Windows 64-bit, the recommended paging file size is three times the size of the RAM.

Software Requirements

- Windows 10 (for prototype and testing), Windows 2019, Windows 2016, and 2012 Server editions.

Note: When installing WebFOCUS Integrated Installation on Windows Server 2019, you must have Oracle Java 8 installed on the machine.

The Oracle Java used during installation is not used by the product during runtime. Oracle Java specified during installation is only used for installation purposes. This is a workaround, which will be addressed in an upcoming update of the installation program.

After installing Oracle Java 8 (JRE or JDK), open a command window (CMD) with the *Run as administrator* option and type the following command:

```
C:\software_download_path\installWebFOCUS_WFI82nn.exe LAX_VM  
"C:\oracle_java_path\java.exe"
```

For example:

```
C:\software\installWebFOCUS_WFI8206.exe LAX_VM "C:\Program Files\Java  
\jre1.8.0_132\bin\java.exe"
```

- 64-bit Version of Windows.
- Supported browsers: Google Chrome™, Mozilla Firefox®, Microsoft Edge®, Internet Explorer® 11.

For more details on browser support, see the *WebFOCUS Release Guide*:

https://techsupport.informationbuilders.com/tech/wbf/8206_relguide.pdf

Procedure: How to Install WebFOCUS Integrated Installation

1. Download the installation files.
2. Run the *installWebFOCUS_WFI8206.exe* executable application file. If the file is available in a zip format, extract the contents, and then run the *installWebFOCUS_WFI8206.exe* executable application file.

Note:

- Java OpenJDK 8 JRE Update 242 (8u242) and Tomcat 8.5.51 are included with WebFOCUS Integrated Installation.

- ❑ The installation program includes the following third-party components: Tomcat, Java OpenJDK, and Derby. Later versions or releases of these third-party components, which often contain fixes for security vulnerabilities, may exist at installation time. It is your responsibility to check the vendor sites listed below for updates to newer versions or releases of these third-party components if you intend to use them with WebFOCUS Integrated Installation. Install the new updates or versions prior to proceeding with the WebFOCUS Integrated Installation. If these components are installed through the WebFOCUS Integrated Installation program, it is your responsibility to update these components after the installation is completed.
- ❑ The latest version of Tomcat is available at <https://tomcat.apache.org>.
- ❑ The latest versions of Java OpenJDK are available from multiple sites, including:
 - <https://openjdk.java.net/>
 - <https://adoptopenjdk.net/> (OpenJDK 8 HotSpot builds from this distribution are included in the installation packages).
 - <https://github.com/ojdkbuild/ojdkbuild>
 - <https://www.azul.com/downloads/zulu-community>
- ❑ The latest version of Derby is available at <https://db.apache.org/derby>.

Tomcat Memory Allocation

- ❑ The Tomcat initial memory pool size (JvmMs) is configured to use 1/8 of the physical memory of the machine. For example, on a machine with 16 GB RAM, the pool size is set to 2124. The maximum memory pool size (JvmMx) is configured to use 1/4 of the physical memory of the machine. For example, on a machine with 16 GB RAM, the pool size is set to 2248.
- ❑ You can change the Java memory allocation by running the *WFIAppSrvw.exe* Tomcat configuration utility, located in the *drive:\ibi\WebFOCUS\tomcat\bin* directory, and selecting the *Java* tab.

Reporting Server Memory Allocation

- ❑ The default Reporting Server memory allocation is set to half the amount of physical memory on the machine.
- ❑ Memory configuration is done on the *infobright.cnf* file, located in folder:
drive:\ibi\WebFOCUS_WFI\svr\wfs\hs\ib_data

- ❑ Parameter `ServerMainHeapSize` specifies the size (in MB) of the main memory heap.

For more information, see <https://webfocusinfocenter.informationbuilders.com/wfappent/pdfs3/hyperstagepost.pdf>.

The InstallAnywhere installation program opens, as shown in the following image.



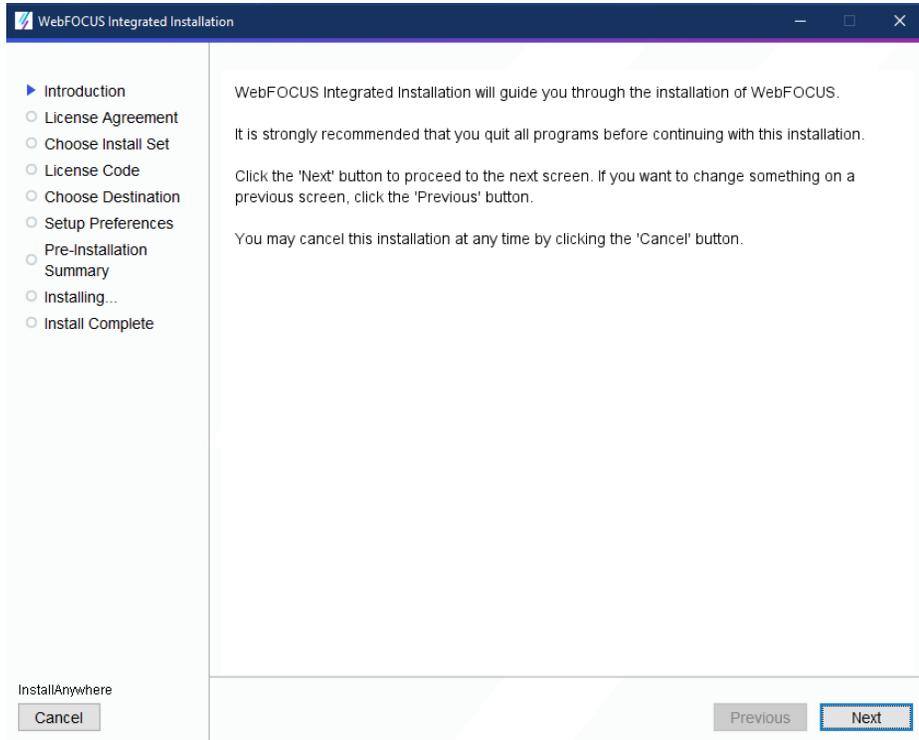
3. Choose the appropriate language from the drop-down list and click *OK*.

The list of languages depends on the regional language settings of the Windows Operating System where WebFOCUS Integrated Installation is being installed.

Note: The language selected will be the language used during the installation program. This language is also used to set the code page of the Reporting Server, which is responsible for data access.

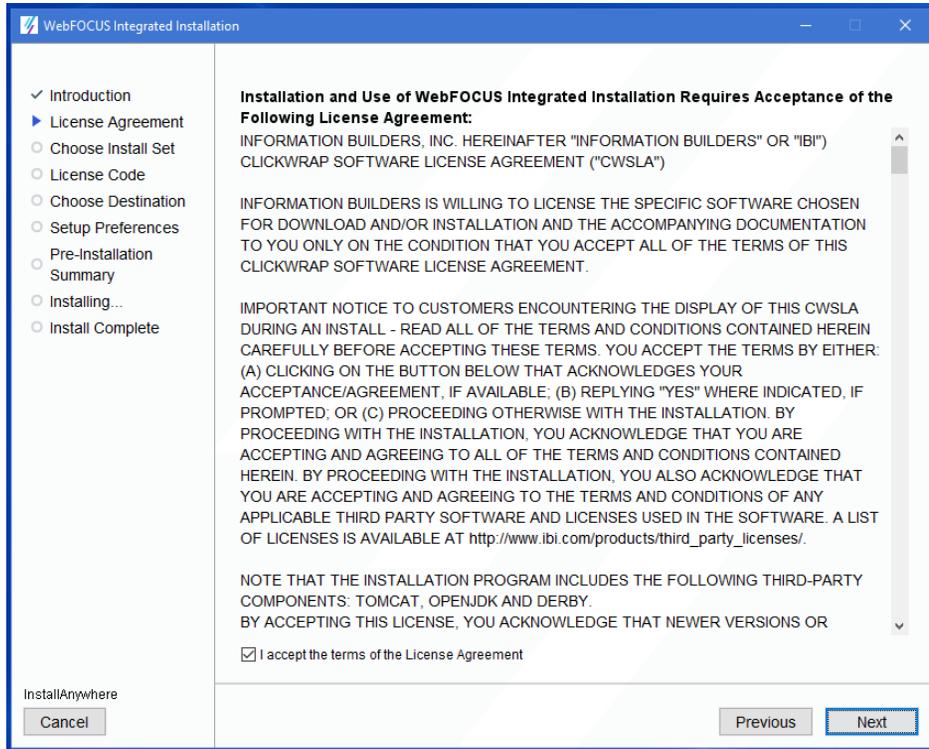
If your data sources are in a different language, you will have to change the code page of the Reporting Server.

The Introduction window opens, as shown in the following image.



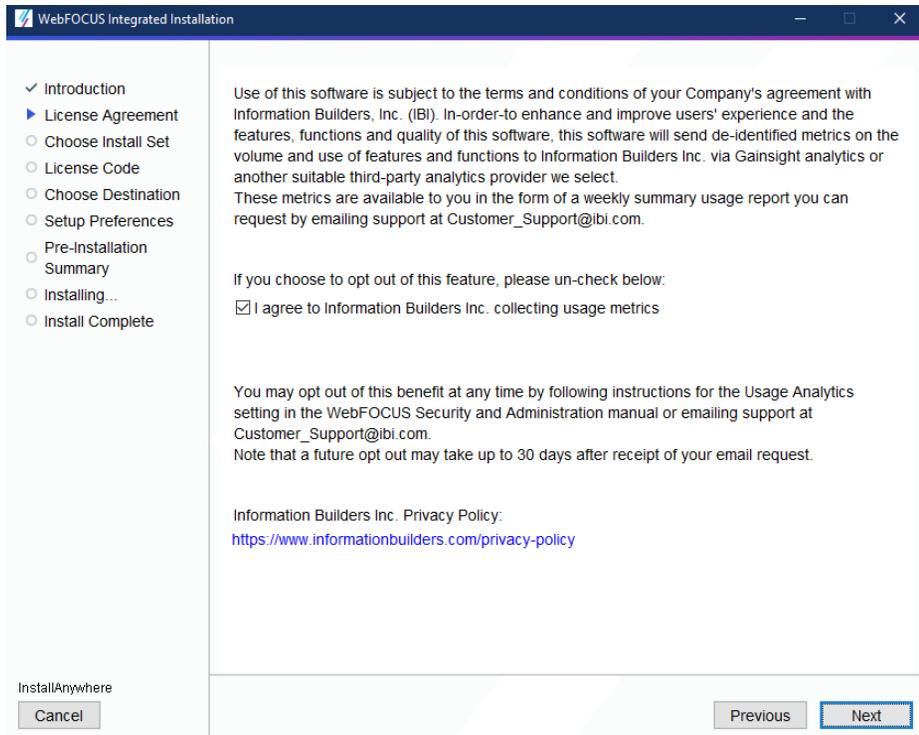
4. Click *Next* to continue.

The License Agreement window opens, as shown in the following image.



5. Select *I accept the terms of the License Agreement*, and then click *Next*.

The following License Agreement window opens, as shown in the following image.

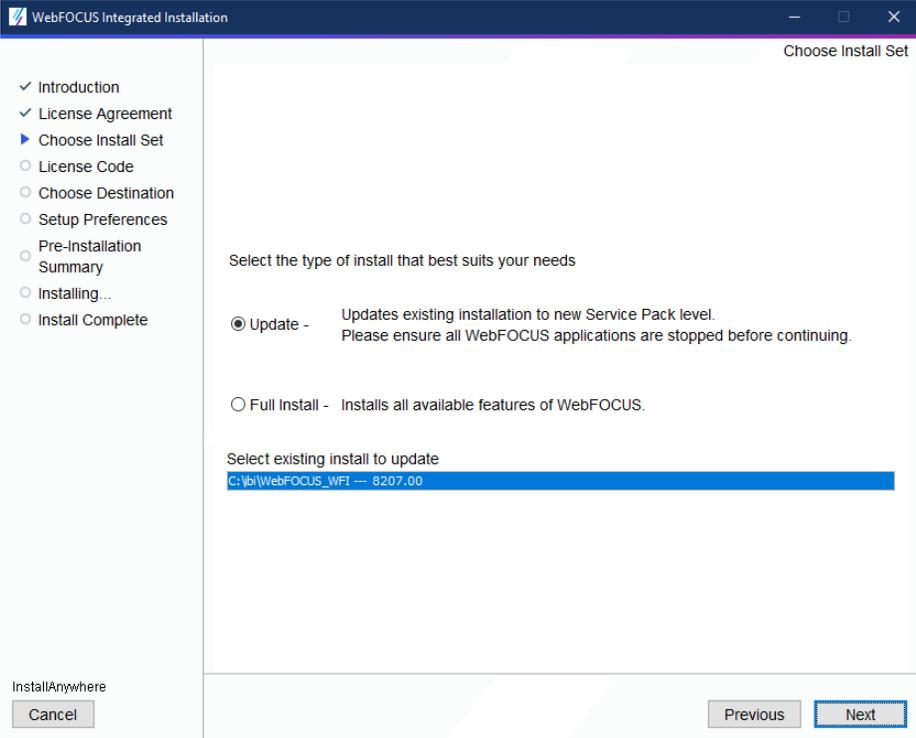


6. Select *I agree to Information Builders, Inc. collecting usage metrics* to enable Information Builders to receive usage metrics on the volume and use of features and functions to be analyzed through an analytics provider.

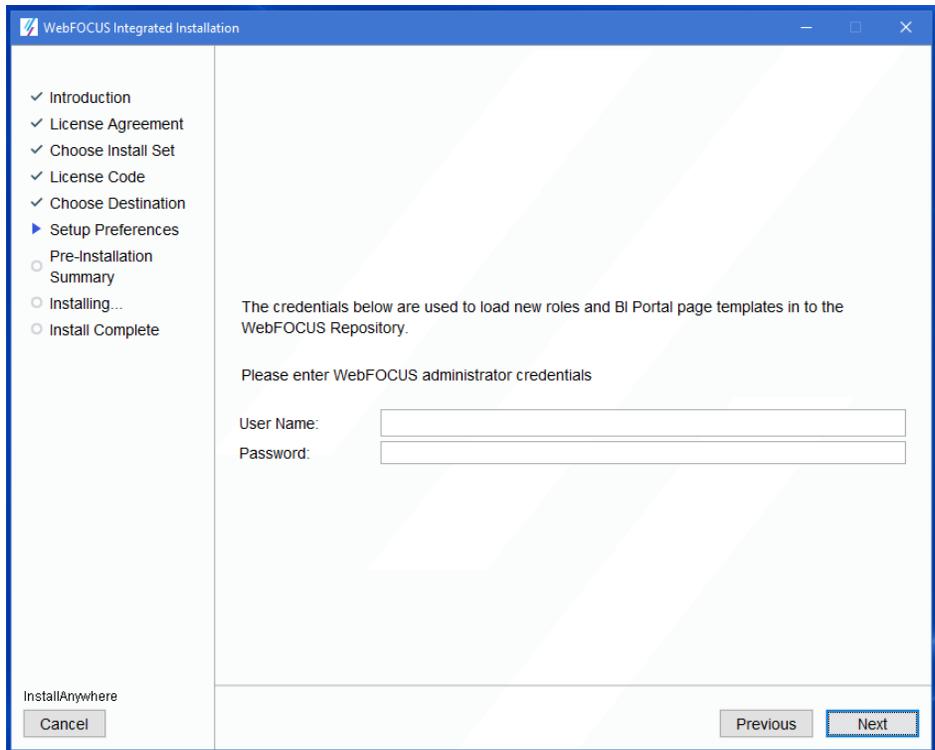
Note:

- Usage metrics are available to you upon making a request to *Customer_Support@ibi.com*.
 - You may opt out at a later time, by turning the Usage Analytics setting off from the WebFOCUS Administration Console.
7. Click *Next*.

Note: If you have an earlier release of WebFOCUS Integrated Installation installed on your machine, the Choose Install Set window opens, as shown in the following image.

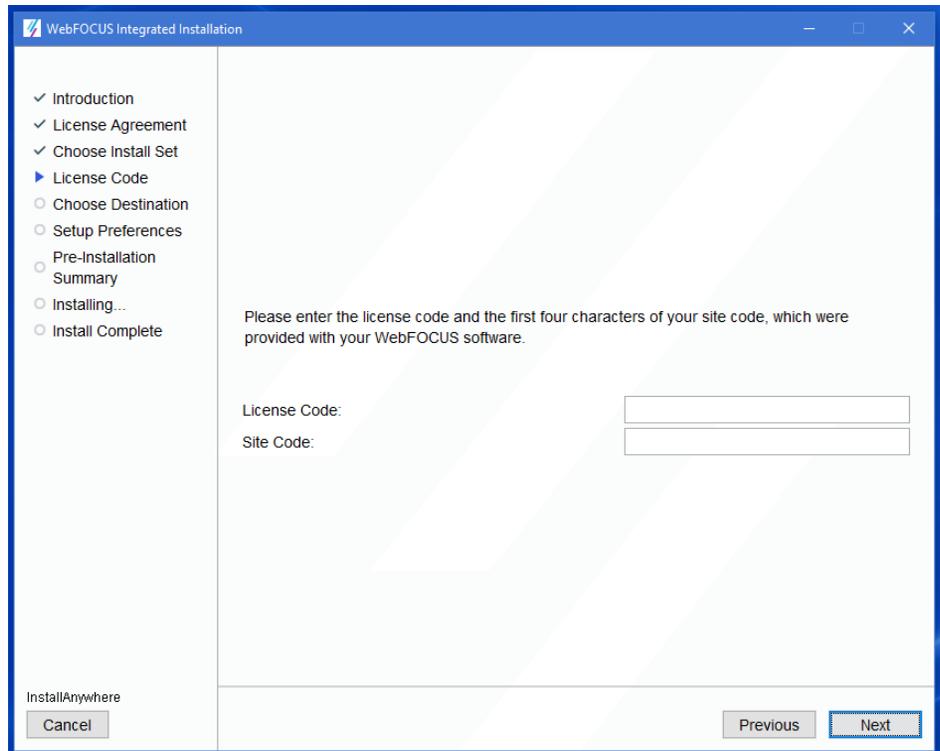


8. From the Choose Install Set window, select the type of installation you want to install:
 - To update your existing installation to a new service pack, select *Update* and the existing instance you want to update. You will be prompted to update your installation and to provide Administrator credentials to load new roles and BI Portal page templates, as shown in the following image. In addition, you must manually stop all WebFOCUS Integrated Installation services, except the WebFOCUS Repository Server service, before beginning the installation program. After typing the Administrator user name and password, continue with step 13.



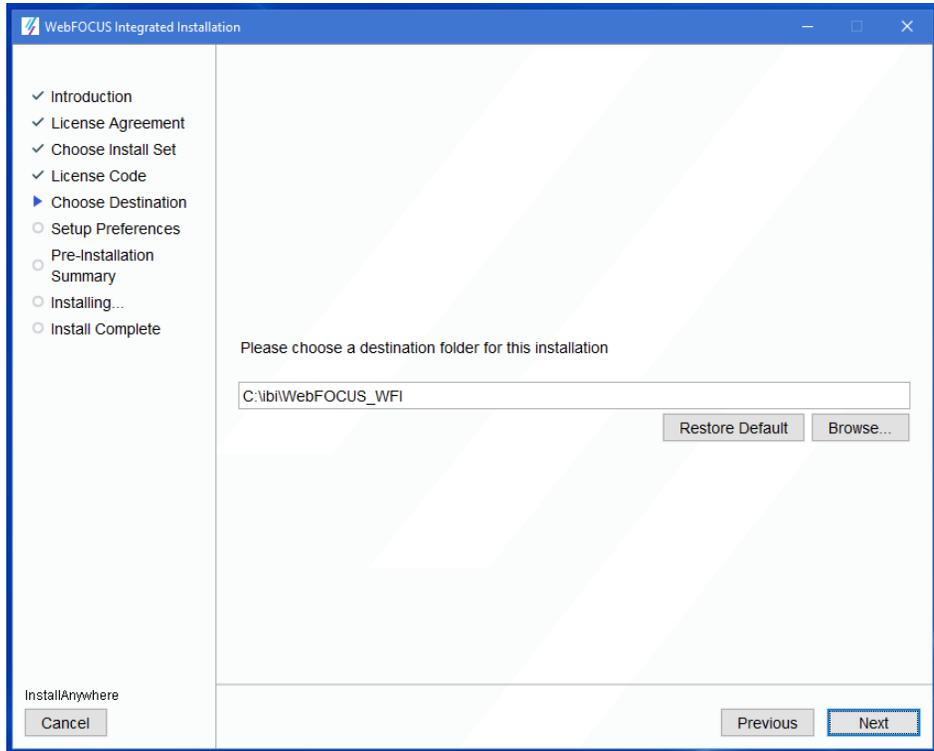
- To perform a new full installation, select *Full Install*.

The License Code window opens, as shown in the following image.



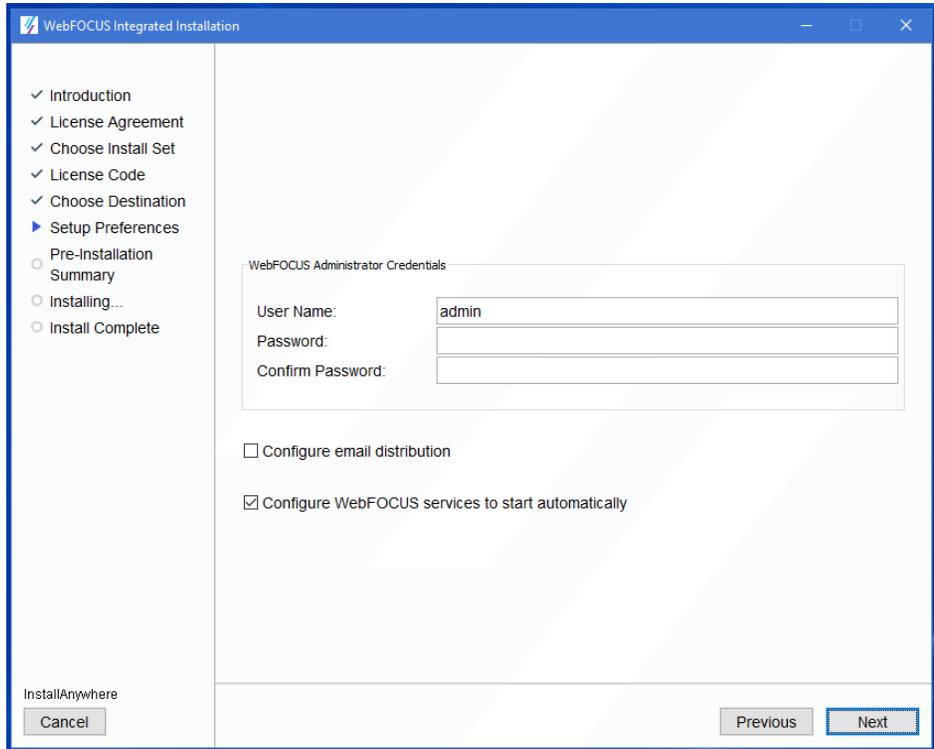
9. Type the WebFOCUS Integrated Installation license code and first four digits of the site code that were provided with your copy of WebFOCUS Integrated Installation, and then click *Next*.

The Choose Destination window opens, as shown in the following image.



10. Type a destination folder for your WebFOCUS Integrated Installation or accept the default, and then click Next.

The Setup Preferences window opens, as shown in the following image.



11. In the Setup Preferences window, complete the following steps:
 - a. The installation program preconfigures a default administrator user name of admin, which can be changed and requires that you type a password. You must complete the User Name credentials section to proceed with the installation. In the Password field, type a password, and then confirm your password. These values are passed to the Reporting Server so that there is a common set of administrator credentials.

Note: The Administrator user name and password supports ASCII characters from 32 to 126 and cannot include the following characters: caret (^), ampersand (&), percent (%), or double quotation marks ("). Refer to the ASCII character table to determine the characters to use for the password. As a reference, see [https://msdn.microsoft.com/en-us/library/60ecse8t\(v=vs.71\).aspx](https://msdn.microsoft.com/en-us/library/60ecse8t(v=vs.71).aspx). The password for the user name must be between four (4) and 20 characters. Leading blanks and trailing blanks will be removed.

- b. Optionally, select the *Configure email distribution* check box to select the type of Mail Server to be used for report distribution. Valid options are:

Google. This requires a Google Account Name and Password.

Note: Google may block sign-in attempts when delivering reports through WebFOCUS Integrated Installation. To allow WebFOCUS Integrated Installation to connect to the Google email account that was configured for email distribution, sign in to the Google account, navigate to *My Account* settings, select *Sign-In & security*, and turn the Allow less secure apps option On.

For more information, see:

<https://www.google.com/settings/security/lesssecureapps>

Yahoo. This requires a Yahoo Account Name and Password.

Other. Select this for all other mail servers. This option requires you to type the host name or IP address for your SMTP mail server.

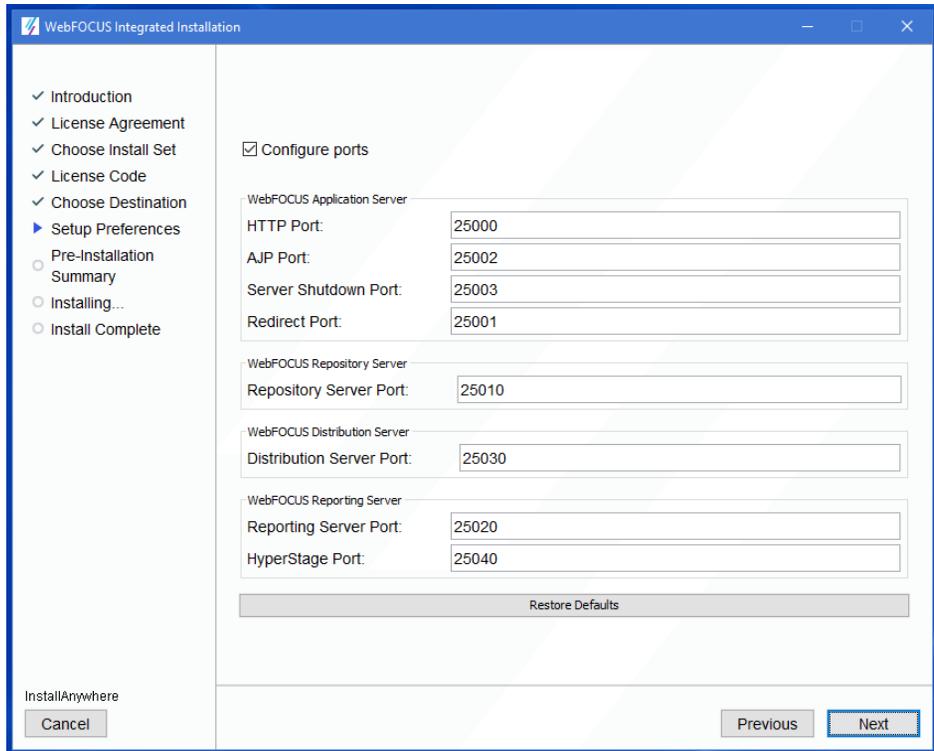
Check the *Advanced Configuration* option if your mail server is configured with SSL or TLS and requires authentication.

- c. The *Configure WebFOCUS services to start automatically* check box is selected, by default. You can leave this check box selected to keep the services Startup Type as Automatic. This will ensure that the services required to run the product are always running, and will not require that you start the services manually, even if you restart the machine.

Optionally, you can clear the *Configure WebFOCUS services to start automatically* check box so you can manually start and stop the WebFOCUS Integrated Installation services from the shortcut options found in the WebFOCUS Integrated Installation group, or through the Windows services program.

12. Click *Next* to continue.

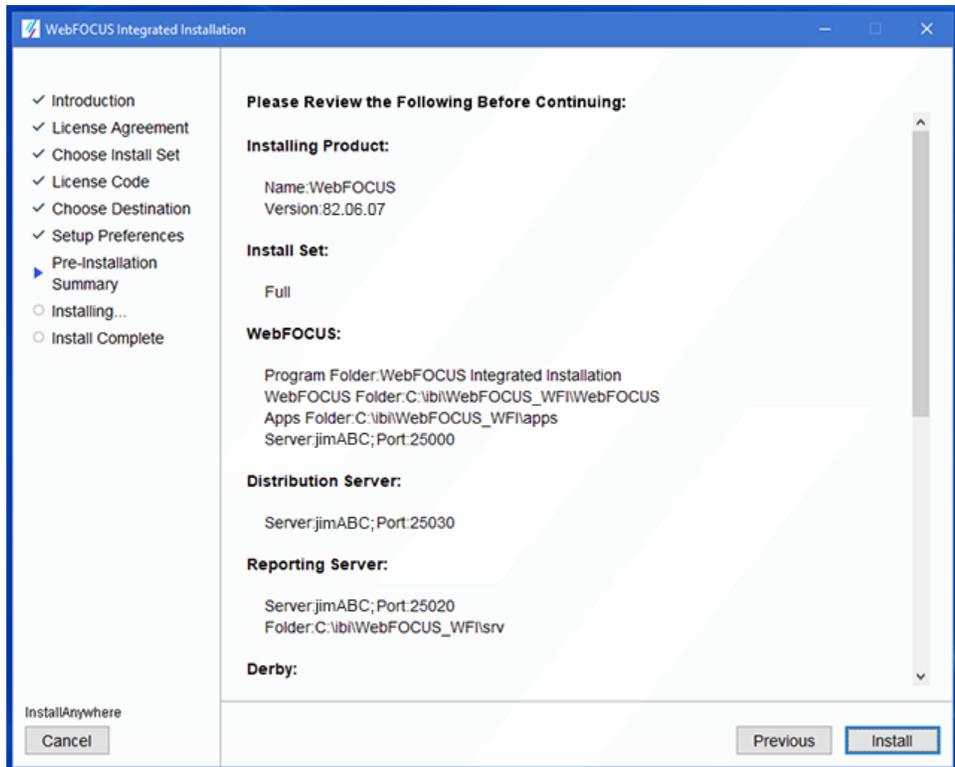
The Configure ports window opens, which indicates the ports used by all product components, as shown in the following image.



Note: By default, Tomcat starts on port 25000. If ports are busy, the next available port is used. You can customize all ports, if necessary, by selecting the *Configure ports* check box.

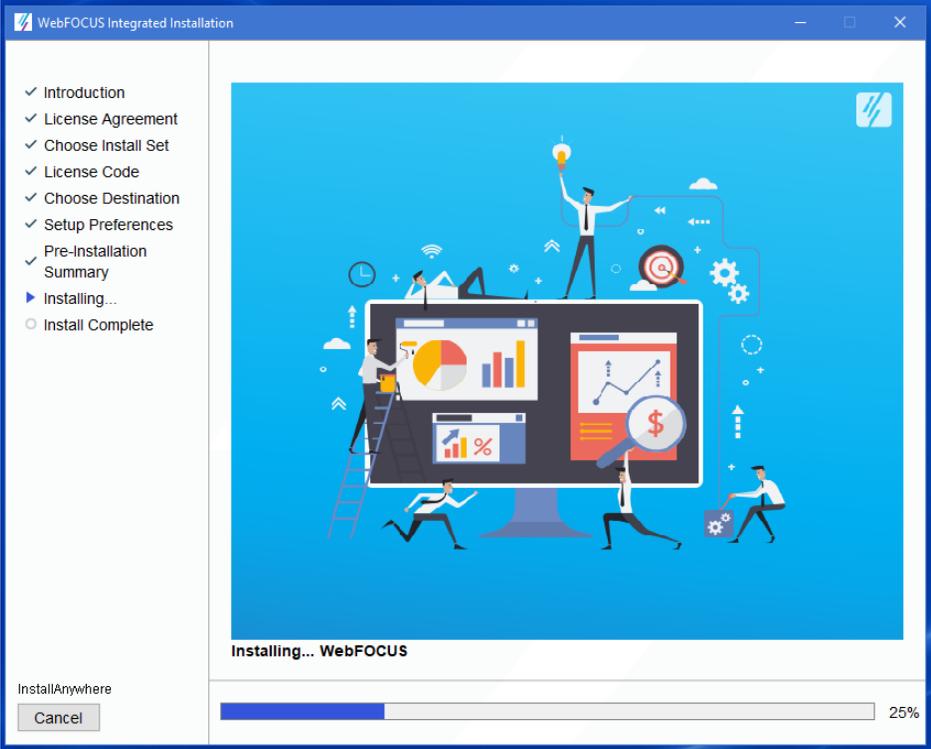
13. Click *Next* to continue.

The Pre-Installation Summary window opens, as shown in the following image.

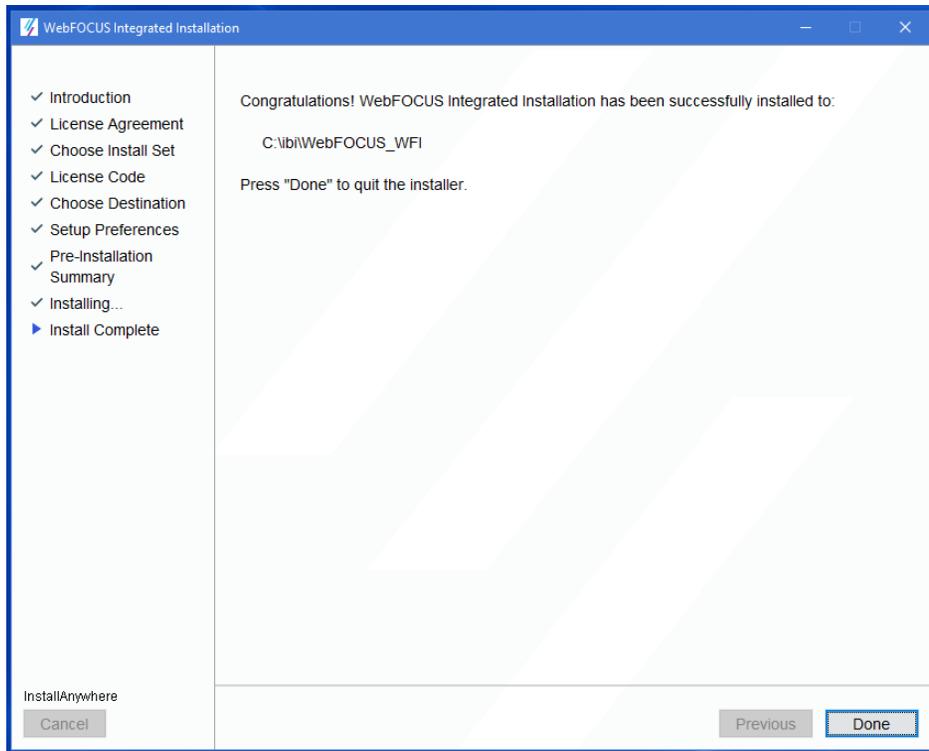


14. Confirm that the summary information is correct, and then click *Install*.

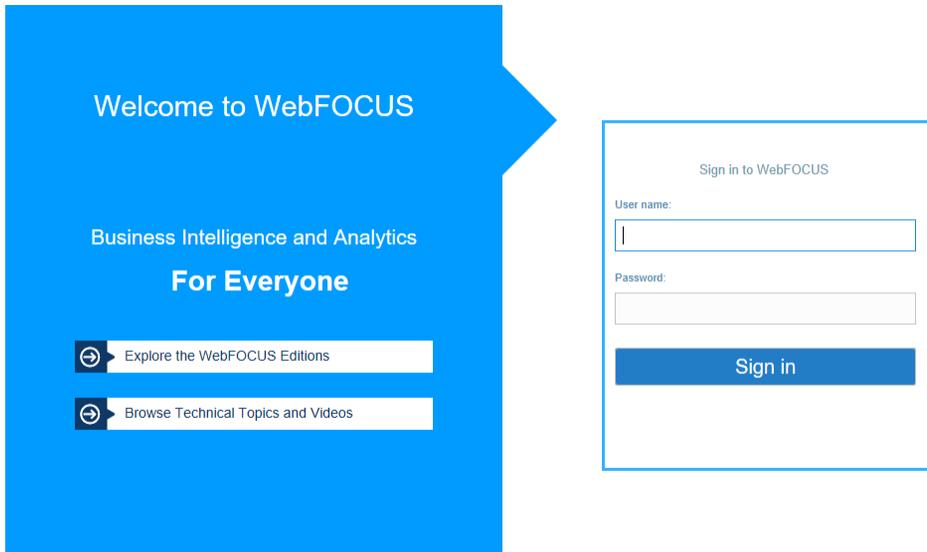
The installation process begins, as shown in the following image.



15. When the installation completes, click *Done* to close the installation program, as shown in the following image.



The Sign In page opens, as shown in the following image.



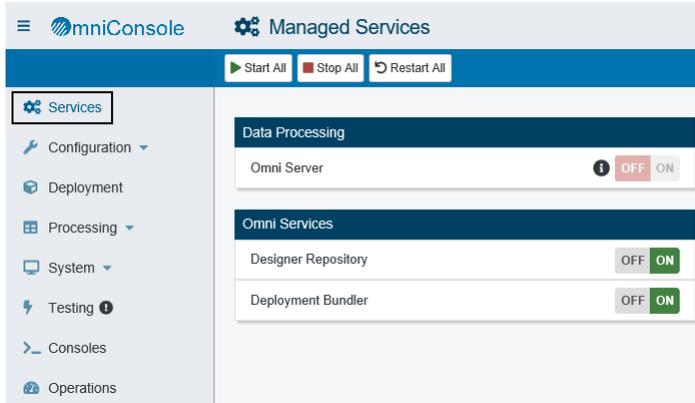
16. Sign in using the administrator credentials that you configured during the installation program.

Starting and Stopping WebFOCUS Services

The installation program installs the following services:

- Application Server
- Distribution Server
- Repository Server
- Reporting Server

To view the status of these services, launch your Windows Services program. The following image highlights the WebFOCUS Integrated Installation services as they appear in the Windows Services program. Select a service and use the toolbar to stop or stop the service.



Display name	Service Name
WebFOCUS WFI Application Server	WFIAppSvc
WebFOCUS WFI Distribution Server	WFI DistSvc
WebFOCUS WFI Reporting Server	WebFOCUS WFI Reporting Server
WebFOCUS WFI Repository Server	WFIReposSvc

Procedure: How to Start or Stop WebFOCUS Integrated Installation Services

From the Start menu, under the Information Builders program group, navigate to the WebFOCUS Integrated Installation shortcut.

- Click *Start WebFOCUS Services* to start the WebFOCUS Integrated Installation services.
- Click *Stop WebFOCUS Services* to stop the WEBFOCUS Integrated Installation services.

To stop or start an individual WebFOCUS Integrated Installation service, use the Windows Services program as described earlier in this section.

Uninstalling WebFOCUS Integrated Installation

If you want to remove an existing WebFOCUS Integrated Installation and want to perform a full installation of a newer release, you can run the uninstall program.

Procedure: How to Preserve Your Data

The following steps can be performed if you want to preserve your data and perform a new installation, if you need to move your data to another location, or if an upgrade installation fails and you need to perform a new full installation.

1. Back up the WebFOCUS Repository Server and Reporting Server application folders to a different location on your machine.

By default, these are located in the following folders:

- `drive:\ibi\WebFOCUS_WFI\derby\`
- `drive:\ibi\WebFOCUS_WFI\apps\`
- `drive:\ibi\WebFOCUS_WFI\svr\wfs\hs\`

2. Uninstall WebFOCUS Integrated Installation. You can uninstall WebFOCUS Integrated Installation from the Start menu, or manually, as described in [How to Manually Uninstall WebFOCUS Integrated Installation Components](#) on page 32.

Procedure: How to Restore and Move Backed Up Data

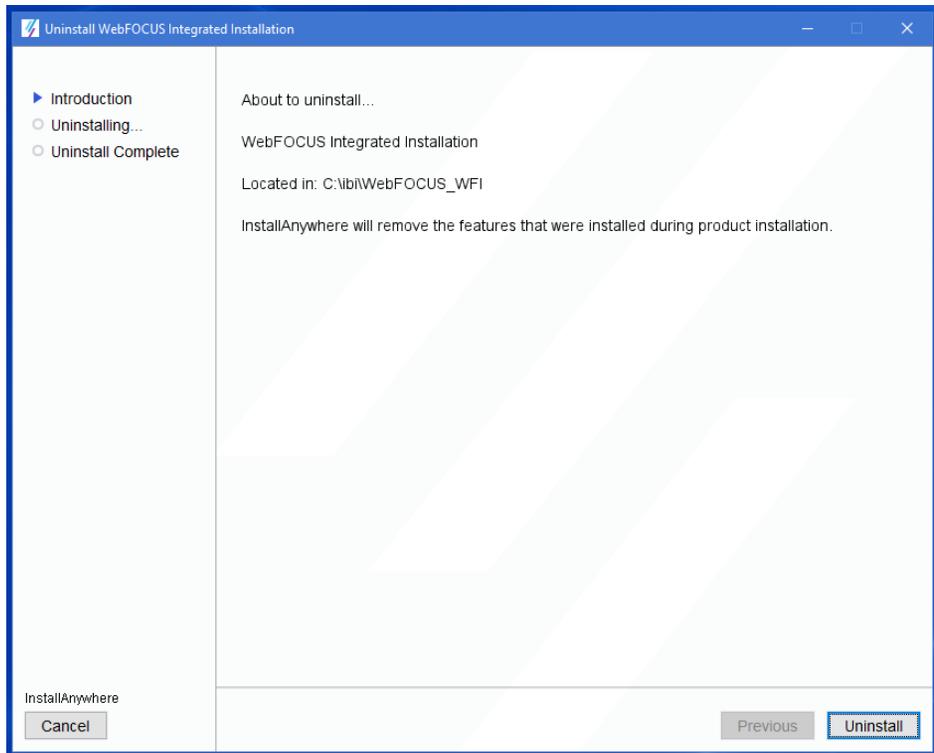
1. Install WebFOCUS Integrated Installation.
2. After the installation program is complete, do the following:
 - a. Manually stop the repository server service.
 - b. Replace the new repository server and Reporting Server application folders, using the backup directories that you made in step 1 of [How to Preserve Your Data](#) on page 29.
 - c. Restart the Repository Server service.

Procedure: How to Uninstall WebFOCUS Integrated Installation

1. From the Start menu, under the Information Builders Program group, navigate to the WebFOCUS Integrated Installation Uninstall shortcut.
2. Click *Uninstall*.

The InstallAnywhere installation program opens.

3. In the Uninstall WebFOCUS Integrated Installation window, click *Uninstall*, as shown in the following image.



The installation program begins and uninstalls the WebFOCUS Integrated Installation components.

Troubleshooting WebFOCUS Integrated Installation

If you are unable to launch WebFOCUS Integrated Installation, ensure that all services are running. If they are not, do the following:

- Stop all services.
- Restart the services.
- Restart WebFOCUS Integration Installation using the *Run WebFOCUS* shortcut available in the WebFOCUS Integrated Installation folder, under the Information Builders program group.

If this does not work, stop the services again. Before you restart the services, ensure that the Hyperstage processes, *ibengine.exe* and *postgres.exe*, are also stopped. Restart your machine if you are still unable to restart the services.

Port Assignment

By default, ports in the range of 25000 to 25040 are checked for availability. If the installation program detects that no ports in that range are available, it then increases the range by 4 and checks again for availability. For example, if ports 25000 to 25040 are unavailable, ports 25004 to 25044 are then checked.

Default Port Assignment.

- Ports 25000 to 25003 are used by the application server.
- Port 25010 is used by the repository server.
- Ports 25020 to 25023 and port 25040 are used by the Reporting Server.
- Port 25030 is used by the Distribution Server.

WebFOCUS Integrated Installation Log Files

WebFOCUS Integrated Installation creates a log file in the following location for Windows:

```
drive:\Users\user_id\WebFOCUS_Integrated_Installation_Install_date_time.log  
drive:\Users\user_id\WebFOCUS_WFI_Debug_date_time.log
```

where:

user_id

Is your Windows user ID.

date_time

Is the date and time the log file was created.

These log files provide information about the WebFOCUS Integrated Installation. If you contact Customer Support Services with an installation problem, have these files available.

Troubleshooting the Uninstall Process

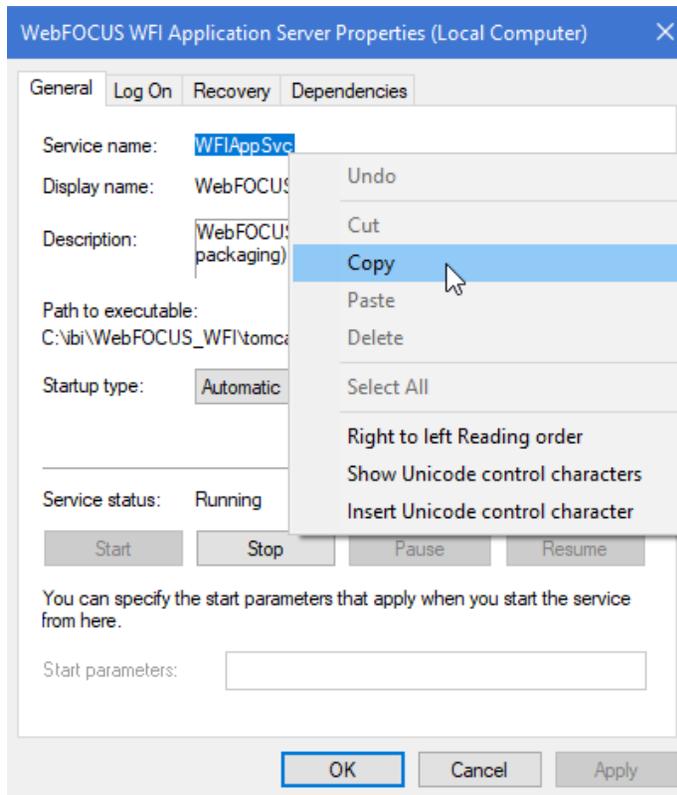
If you choose to uninstall WebFOCUS Integrated Installation, and the uninstall process fails, you can follow one of the procedures in this section to clean up your machine before reinstalling the product.

Before performing one of the following procedures, ensure that you have uninstalled WebFOCUS Integrated Installation, as described in [How to Uninstall WebFOCUS Integrated Installation](#) on page 29.

Procedure: How to Manually Uninstall WebFOCUS Integrated Installation Components

If the WebFOCUS Integrated Installation uninstall process fails, you can do the following to manually cleanup the remaining WebFOCUS Integrated Installation components on your machine.

1. Stop any running WebFOCUS Integrated Installation services on the system, as detailed in [How to Start or Stop WebFOCUS Integrated Installation Services](#) on page 28.
2. Remove any remaining services from your machine.
 - a. Locate the existing WebFOCUS Integrated Installation services. To get the service name, right-click the service in the Windows Services program and select *Properties*. The Properties window opens, where you can right-click the service name and click *Copy*, as shown in the following image.



- b. To remove a service, open the Command Prompt as an Administrator and issue the following command:

```
sc delete "service name"
```

where:

```
service name
```

Is the name of the service you are manually deleting. For example:

```
C:\sc delete "WFIAppSvc"
```

Note: The service name must be enclosed in double quotation marks (") if it contains a space.

Repeat this for the remaining services.

3. Open Task Manager and ensure that the process *ibengine.exe* is not running.
4. Remove files from disk, except for the Reporting Server application folders and other folders containing application data, in case you need to save this data for later use.

For example, if WebFOCUS Integrated Installation is installed on the C:\ drive, remove all folders under C:\ibi\WebFOCUS_WFI\, except for the following folders:

C:\ibi\WebFOCUS_WFI\apps\

C:\ibi\WebFOCUS_WFI\svr\wfs\hs\

C:\ibi\WebFOCUS_WFI\Derby\

5. From the Start menu, under the Information Builders program group, right-click the *WebFOCUS Integrated Installation* folder, select *More*, select *Open file selection*, and then delete the folder.
6. Launch the Windows Registry Editor, and remove the following registry keys.
 - HKEY_LOCAL_MACHINE\SOFTWARE\Information Builders\WebFOCUS
 - HKEY_LOCAL_MACHINE\SOFTWARE\Information Builders\Derby\WFIReposSvc
 - HKEY_LOCAL_MACHINE\SOFTWARE\Information Builders\WebFOCUS WFI Reporting Server
 - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Information Builders\ReportCaster\WFI DistSvc
 - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Apache Software Foundation\Procrun 2.0\WFIAppSvc

Installing WebFOCUS Integrated Installation on a Linux Environment

The following section describes how to install WebFOCUS Integrated Installation on a Linux environment. WebFOCUS Integrated Installation is supported on:

- ❑ Intel Linux - Kernel-2.6.32-glibc-2.6 and higher x86_64 64-bit

Note: Java OpenJDK 8 JRE 242 (8u242) and Tomcat 8.5.1 are included with the WebFOCUS Integrated Installation product installation.

- ❑ Intel Linux - Kernel-3.10.0-glibc-2.17 and higher x86_64 64-bit

Note: Java OpenJDK 8 JRE 242 (8u242) and Tomcat 8.5.51 are included with the WebFOCUS Integrated Installation product installation.

The installation program includes the following third-party components: Tomcat, Java OpenJDK, and Derby. Later versions or releases of these third-party components, which often contain fixes for security vulnerabilities, may exist at installation time. It is your responsibility to check the vendor sites listed below for updates to newer versions or releases of these third-party components if you intend to use them with WebFOCUS Integrated Installation. Install the new updates or versions prior to proceeding with the WebFOCUS Integrated Installation installation. If these components are installed through the WebFOCUS Integrated Installation program, it is your responsibility to update these components after the installation is completed.

- ❑ The latest version of Tomcat is available at <https://tomcat.apache.org>.

- ❑ The latest versions of Java OpenJDK are available from multiple sites, including:

<https://openjdk.java.net/>

<https://adoptopenjdk.net/> (OpenJDK 8 HotSpot builds from this distribution are included in the installation packages).

<https://github.com/ojdkbuild/ojdkbuild>

<https://www.azul.com/downloads/zulu-community>

- ❑ The latest version of Derby is available at <https://db.apache.org/derby>.

WebFOCUS Integrated Installation System Requirements on a Linux Environment

The following section describes the system requirements for installing WebFOCUS Integrated Installation on a Linux environment.

Installation Prerequisites

The following are installation prerequisites for installing WebFOCUS Integrated Installation on Linux:

- ❑ WebFOCUS Integrated Installation cannot be installed as user root, due to requirements of the PostgreSQL database used by Hyperstage.

If user root is detected, the installation will exit and the following message displays:

```
The installation cannot proceed under the root user account and will
terminate. Restart the installation as a non-root user.
```

- ❑ When installing WebFOCUS Integrated Installation on Linux machines, if the unzip application is not found, the following message displays:

```
Invalid unzip command found.
```

This is generated by the installation program and does not prevent the installation from proceeding and completing successfully.

- ❑ WebFOCUS Integrated Installation requires a minimum of 5GB of available disk space to successfully install on the target system.
- ❑ An additional 8GB of required disk space is used during the installation of the product. This temporary use of disk space will be removed at the end of the installation.

If the temp directory on the host does not meet the minimum size requirements, the InstallAnywhere environment variable IATEMPDIR can be set to use an alternate directory.

You may specify an alternate /tmp location by setting the following environment variable:

```
IATEMPDIR=/large_tmp
export IATEMPDIR
```

System Resource Limits

The operating system provides ways of limiting the amount of resources that can be used. These limits can affect the installation process.

Use the *ulimit* command to set process memory-related resource limits for your session.

The WebFOCUS Integrated Installation program requires ulimit to be set to 8192.

Limits can be *hard* or *soft*. Hard limits are set by the root user. Only the root user can increase hard limits, although other users can decrease them. Soft limits can be set and changed by other users, but they cannot exceed the hard limits. To view the current limits, type the following command:

```
ulimit -a
```

Use the `/etc/security/limits.conf` file to store `ulimit` settings. Changes to this file should be made by a system administrator.

Installing WebFOCUS Integrated Installation Using Console Mode

The following section describes how to install WebFOCUS Integrated Installation using Console Mode.

Procedure: How to Install WebFOCUS Integrated Installation Using Console Mode

1. Download the self extracting installation program, `installWebFOCUS_WFI8206.bin`.
2. Apply the permissions necessary for the owner of the file to execute the installation by using the following command:

```
chmod u+x installWebFOCUS_WFI8206.bin
```

3. Run the installation program using the following command:

```
./installWebFOCUS_WFI8206.bin -i console
```

The Introduction to WebFOCUS Integrated Installation prompt displays.

4. Press Enter to continue.

The License Agreement prompt displays.

5. Read the License Agreement. Press Enter after each screen until you receive the License Agreement Acceptance prompt.
6. Type `Y` to accept the terms of the agreement and press Enter to continue.
7. Type `Y` to enable Information Builders to receive usage metrics on the volume and use of features and functions to be analyzed through an analytics provider.

Note:

- Usage metrics are available to you upon making a request to `Customer_Support@ibi.com`.
 - You may opt out at a later time, by turning the Usage Analytics setting off from the WebFOCUS Administration Console.
8. Press Enter to continue.
The Choose Install Type prompt displays.
 9. Type `2` to perform a full installation of WebFOCUS Integrated Installation.

10. Press Enter to continue.

The License Code prompt displays.

11. Type the WebFOCUS Integrated Installation license code (17 digits).

This code was sent to you as part of the email message that contained the download link for the software.

You are prompted to enter the site code.

12. Type the WebFOCUS Integrated Installation site code (4 digits).

This code was sent to you as part of the email message that contained the download link for the software.

13. Press Enter to continue.

The Choose Folder prompt displays.

14. Accept the default destination folder for the installation. If you want to install WebFOCUS Integrated Installation in a different folder, type the path to the location where you want to install the software.

Note: Spaces are not allowed in the destination path.

15. Press Enter to continue.

The Setup Preferences prompt displays. You are prompted to enter the WebFOCUS Integrated Installation Administration credentials.

16. Type a user name and password to use as the Administration ID.

Note: The Administrator user name and password supports ASCII characters from 32 to 126 and cannot include the following characters: caret (^), ampersand (&), percent (%), or double quotation marks ("). Refer to the ASCII character table to determine the characters to use for the password. As a reference, see [https://msdn.microsoft.com/en-us/library/60ecse8t\(v=vs.71\).aspx](https://msdn.microsoft.com/en-us/library/60ecse8t(v=vs.71).aspx). The password for the user name must be between four and 20 characters. Leading blanks and trailing blanks will be removed.

The Configure email distribution prompt displays.

17. Optionally, type Y to choose the type of Mail Server to be used for report distribution. Valid options are:

- Google.** This requires a Google Account Name and Password.

Note: Google may block sign-in attempts when delivering reports through WebFOCUS Integrated Installation. To allow WebFOCUS Integrated Installation to connect to the Google email account that was configured for email distribution, sign in to the Google account, navigate to *My Account* settings, select *Sign-In & security*, and turn the Allow less secure apps option On.

For more information, see:

<https://www.google.com/settings/security/lesssecureapps>

- Yahoo.** This requires a Yahoo Account Name and Password.
- Other.** Select this for all other mail servers. This option requires you to type the host name or IP address for your SMTP mail server. You can also specify if your mail server is configured with SSL or TLS and requires authentication.

18. Press Enter to continue.

19. Verify that the Pre-Installation Summary information is correct, and press Enter to continue.

The installation begins.

During installation, the activity window indicates which installation program tasks are being performed.

When installation is complete, a summary is provided displaying the servers that were installed and the ports that have been assigned.

Configuring Java Memory Allocation for the Application Server

For Linux installations, the default Tomcat Java memory configuration is set to use an initial Java heap size of 1024MB and a maximum Java heap size of 2048MB.

These settings are located in the `/ibi/WebFOCUS/tomcat/bin/catalina.sh` file. For example:

```
JAVA_OPTS="-Xms1024m -Xmx2048m -Djava.awt.headless=true"
```

These settings are applied, by default, to provide better product performance.

Note:

- Ensure that the memory allocated on the machine is available. If the memory is not available, the application server will not start.
- You can adjust the memory allocation by updating the `catalina.sh` file or by setting the Java heap size, using the `_JAVA_OPTIONS` environment variable.

The following is an example of setting Java through the `_JAVA_OPTIONS` environment variable:

```
_JAVA_OPTIONS=' -Xms1024m -Xmx2048m '  
export _JAVA_OPTIONS
```

This will override the memory setting in the `catalina.sh` file and must be issued prior to starting Tomcat.

Reporting Server Memory Allocation

- ❑ The default Reporting Server memory allocation is set to half the amount of physical memory on the machine.
- ❑ Memory configuration is done on the `infobright.cnf` file, located in folder:
`install_directory/ibi/WebFOCUS_WFI/srv/wfs/hs/ib_data/`
- ❑ Parameter `ServerMainHeapSize` specifies the size (in MB) of the main memory heap.

For more information, see <https://webfocusinfocenter.informationbuilders.com/wfappent/pdfs3/hyperstagepost.pdf>.

Launching WebFOCUS Integrated Installation

To launch WebFOCUS Integrated Installation, type the following:

```
http://host:port/ibi_apps/
```

Note: Enter the application server port number when using this command to start WebFOCUS Integrated Installation. The application server port number is the lowest port number displayed in the summary at the end of the WebFOCUS Integrated Installation.

The default port for the WebFOCUS Integrated Installation application server is 25000. It is listed during the end of the installation and also available in the installation log file.

Installation log files are under the user home directory. An example of an installation log file is shown in the example below:

```
/$HOME/WebFOCUS_Integrated_Installation_Install_date_time.log
/$HOME/WebFOCUS_WFI_Debug_date_time.log
```

where:

```
date_time
```

Is the date and time the log file was created.

These log files provide information about the WebFOCUS Integrated Installation. If you contact Customer Support Services with an installation problem, have these files available.

Running WebFOCUS Integrated Installation Servers Manually

The following commands are used to manually start and stop the required WebFOCUS Integrated Installation servers.

Note: The `/home/user/` path depends on your installation.

Starting Servers

You must start the servers in the following order:

- Repository Server
- Application Server
- Distribution Server
- Reporting Server

To start the WebFOCUS Repository Server, run:

```
nohup /home/user/ibi/WebFOCUS_WFI/derby/bin/start.sh &
```

To start the WebFOCUS Integrated Installation Application Server, run:

```
/home/user/ibi/WebFOCUS_WFI/tomcat/bin/startup.sh
```

To start the WebFOCUS Integrated Installation Distribution Server, run:

```
nohup /home/user/ibi/WebFOCUS_WFI/WebFOCUS/ReportCaster/bin/schbkr &
```

To start the WebFOCUS Integrated Installation Reporting Server, run:

```
/home/user/ibi/WebFOCUS_WFI/srv/wfs/bin/edastart -start
```

Stopping Servers

You must stop the servers in the following order:

- Application Server
- Distribution Server
- Repository Server
- Reporting Server

To stop the WebFOCUS Integrated Installation Application Server, run:

```
/home/user/ibi/WebFOCUS_WFI/tomcat/bin/shutdown.sh
```

To stop the WebFOCUS Integrated Installation Distribution Server, run:

```
/home/user/ibi/WebFOCUS_WFI/WebFOCUS/ReportCaster/bin/stopit
```

To stop the WebFOCUS Repository Server, run:

```
/home/user/ibi/WebFOCUS_WFI/derby/bin/stop.sh
```

To stop the WebFOCUS Integrated Installation Reporting Server, run:

```
/home/user/ibi/WebFOCUS_WFI/srv/wfs/bin/edastart -stop
```

Creating Shell Scripts to Start and Stop Servers

You can create shell scripts that run the following commands to start and stop servers:

Start Servers

```
nohup /home/user/ibi/WebFOCUS_WFI/derby/bin/start.sh &
sleep 5
/home/user/ibi/WebFOCUS_WFI/tomcat/bin/startup.sh
nohup /home/user/ibi/WebFOCUS_WFI/WebFOCUS/ReportCaster/bin/schbkr &
/home/user/ibi/WebFOCUS_WFI/srv/wfs/bin/edastart -start
```

Stop Servers

```
/home/user/ibi/WebFOCUS_WFI/tomcat/bin/shutdown.sh
/home/user/ibi/WebFOCUS_WFI/WebFOCUS/ReportCaster/bin/stopit
/home/user/ibi/WebFOCUS_WFI/derby/bin/stop.sh
/home/user/ibi/WebFOCUS_WFI/srv/wfs/bin/edastart -stop
```

Note:

- Adjust the paths based on your installation directories.
- The sleep 5 command adds a wait period to ensure Derby has started.

Updating WebFOCUS Integrated Installation

You can update an earlier release of WebFOCUS Integrated Installation using the following steps.

Procedure: How to Update WebFOCUS Integrated Installation

1. Manually stop all WebFOCUS Integrated Installation servers, including the Application Server, Repository Server, Distribution Server, Reporting Server, and Hyperstage Server.
2. Ensure that all ports that are used by WebFOCUS Integrated Installation processes are stopped. You can run a command, such as *netstat*, to check the ports.

Note: If the ports are busy, run a command, such as *lsof*, to identify what processes are still running, and stop those processes. Before you proceed, you must rerun the *netstat* command.

3. Download the self extracting installation program, *install.bin*.
4. Apply the permissions necessary for the owner of the file to execute the installation by using the following command:

```
chmod u+x installWebFOCUS_WFI8206.bin
```

5. Press Enter to continue.
6. Run the installation program using the following command:

```
./installWebFOCUS_WFI8206.bin -i console
```

The Introduction to WebFOCUS Integrated Installation prompt displays.

7. Read the License Agreement. Press Enter after each screen until you receive the License Agreement Acceptance prompt.
8. Type Y to accept the terms of the agreement and press Enter to continue.
9. Type Y to enable Information Builders to receive usage metrics on the volume and use of features and functions to be analyzed through an analytics provider.

Note:

- Usage metrics are available to you upon making a request to *Customer_Support@ibi.com*.
- You may opt out at a later time, by turning the Usage Analytics setting off from the WebFOCUS Administration Console.

10. Press Enter to continue.

The Choose Install Type prompt displays.

11. Type 1 to update an existing WebFOCUS Integrated Installation to a new Service Pack level.
12. Press Enter to continue.
13. Type the path to the existing installation you want to update.
14. Press Enter to continue.
15. Verify that the Pre-Installation Summary information is correct, and press Enter to continue.

The installation begins.

During installation, the activity window indicates which installation program tasks are being performed.

16. Clear the Tomcat cache, all folders under:

```
/home/user/ibi/WebFOCUS_WFI/tomcat/work/Catalina/localhost/
```

17. Before launching WebFOCUS Integrated Installation, start the Servers as outlined in [Running WebFOCUS Integrated Installation Servers Manually](#) on page 39.
18. Start the WebFOCUS Repository Server by running:

```
nohup /home/user/ibi/WebFOCUS_WFI/derby/bin/start.sh &
```

19. Run the following script file, if this step failed to run during the installation update process.

```
/home/user/ibi/WebFOCUS_WFI/WebFOCUS/utilities/WFReposUtil/
update_repos.sh
```

This script will make updates to the WebFOCUS Integrated Installation repository that are required to load new roles and BI Portal page templates.

You are prompted for WebFOCUS Integrated Installation Administrator credentials.

20. Start the other servers:

```
/home/user/ibi/WebFOCUS_WFI/tomcat/bin/startup.sh
nohup /home/user/ibi/WebFOCUS_WFI/WebFOCUS/ReportCaster/bin/schbkr &
/home/user/ibi/WebFOCUS_WFI/srv/wfs/bin/edastart -start
```

The upgrade is now complete and you can use the software.

Uninstalling WebFOCUS Integrated Installation

To uninstall WebFOCUS Integrated Installation, delete the `/home/user/ibi/WebFOCUS_WFI/` directory or run the uninstall program using the following command:

```
/home/user/ibi/WebFOCUS_WFI/Uninstall/Uninstall
```

Configuring for Email Distribution

An email server is required for email distribution and notifications. The following procedures provide the steps for configuring the supported mail servers.

Procedure: How to Configure the Mail Server

1. From the WebFOCUS Integrated Installation Portal Menu bar, click *Administrator*, click *Administration*, and then click *Administration Console*. From the Administration Console, click the *ReportCaster* tab.

or

From the WebFOCUS Integrated Installation Portal Menu bar, click *Administrator*, click *Tools*, and then click *ReportCaster Status*.

2. Click the *Configuration* option on the ribbon.
3. Select the *Email Distribution* folder.
4. Type the name of your mail server in the Mail Server text box.

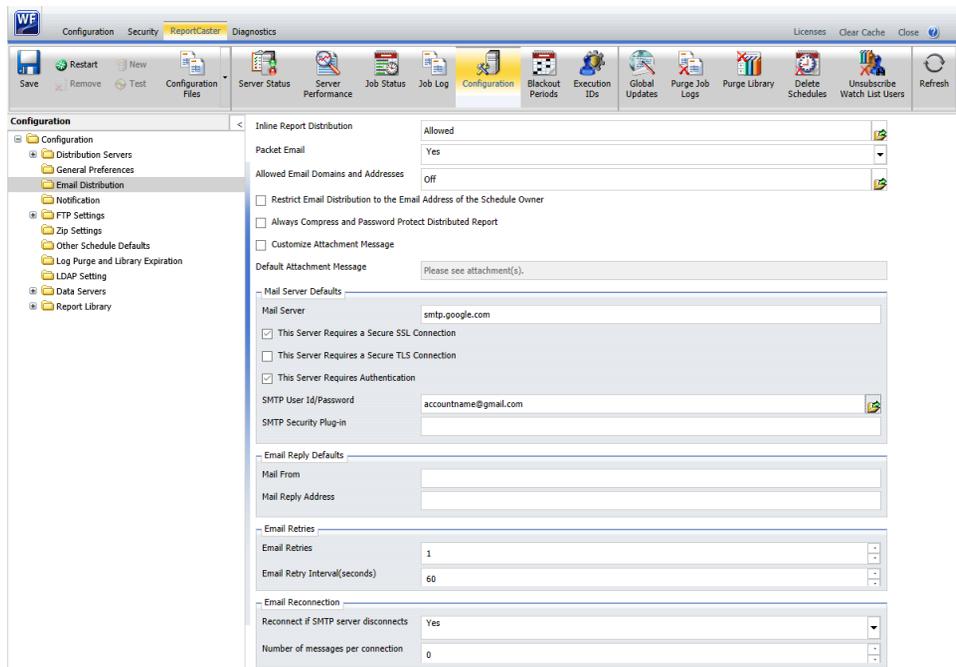
In addition, if your mail server uses a secure connection or requires authentication, select the appropriate options and type the required credentials. You need to save your configuration changes and restart ReportCaster to make the changes effective.

If you use Google as your email server, see [How to Configure Google as the Email Server](#) on page 44.

If you use Yahoo as your email server, see [How to Configure Yahoo as the Email Server](#) on page 45.

Procedure: How to Configure Google as the Email Server

1. Type the name of the Google SMTP Server in the Mail Server text box, as shown in the following image.

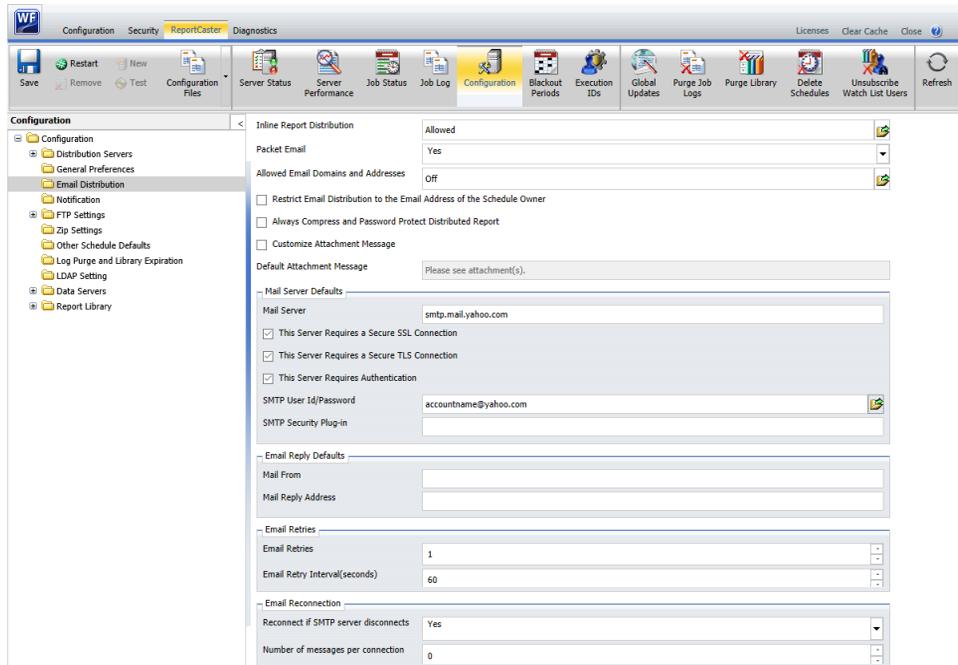


2. Select the *This Server Requires a Secure SSL Connection* check box.
3. Do not select the *This Server Requires a Secure TLS Connection* check box.
4. Select the *This Server Requires Authentication* check box.
5. Click the *File Open* button to open the SMTP User ID/Password dialog box.
6. Type your Google account name.
7. Type the password for this account.
8. Confirm the password for this account.
9. Click *OK* to close the dialog box.

10. Click *Save* in the *Manage Configuration* group on the ribbon.
11. Click *Restart* in the *Manage Configuration* group on the ribbon.

Procedure: How to Configure Yahoo as the Email Server

1. Type the name of the Yahoo SMTP Server in the Mail Server text box, as shown in the following image.



2. Select the *This Server Requires a Secure SSL Connection* check box.
3. Select the *This Server Requires a Secure TLS Connection* check box.
4. Select the *This Server Requires Authentication* check box.
5. Click the *File Open* button to open the SMTP User ID/Password dialog box.
6. Type your Yahoo account name.
7. Type the password for this account.
8. Confirm the password for this account.
9. Click *OK* to close the dialog box.
10. Click *Save* in the *Manage Configuration* group on the ribbon.
11. Click *Restart* in the *Manage Configuration* group on the ribbon.

Chapter 2

Solr Installation and Configuration

Solr is an open-source, high-performance, full-featured enterprise-search platform. Solr uses the Apache Lucene™ Java search library as its core for searching and indexing.

The following Information Builders features make use of the Solr platform:

- InfoSearch
- WebFOCUS Home Page
- Home Widget
- Navigation Widget

In this chapter:

- [Installing and Configuring Solr](#)
-

Installing and Configuring Solr

Note:

- The WebFOCUS Integrated Installation Package was tested with Solr Version 8.0.0.
- The WebFOCUS Integrated Installation creates an `ibi/WebFOCUS_WFI/solr` directory with the following zip files:
 - ibi-protected.zip**. Contains Solr indexes for the WebFOCUS retail samples data.
 - solr-8.0.0.zip**. Contains the Solr Version 8.0.0 distribution archive.

Procedure: How to Install and Configure Solr

1. Navigate to the `drive:\ibi\WebFOCUS_WFI\solr` directory and extract `solr-8.0.0.zip` to the same directory.
2. Navigate to the `drive:\ibi\WebFOCUS_WFI\solr` directory and extract `ibi-protected.zip` to the `drive:\ibi\WebFOCUS_WFI\solr\solr-8.0.0\server\solr\` directory.

Note: This will create the following subfolder with data indexed for the WebFOCUS retail data sources.

For Windows:

```
drive:\ibi\WebFOCUS_WFI\solr\solr-8.0.0\server\solr\ibi-protected\
```

For Linux:

```
/install_directory/ibi/WebFOCUS_WFI/solr/solr-8.0.0/server/solr/ibi-protected/
```

3. Optionally, change the default 8983 startup port.
 - a. Edit the script file.

For Windows:

```
drive:\ibi\WebFOCUS_WFI\solr\solr-8.0.0\bin\solr.in.cmd
```

For Linux:

```
/install_directory/ibi/WebFOCUS_WFI/solr/solr-8.0.0/solr.in.sh
```

- b. Uncomment the following line:

```
REM set SOLR_PORT=8983
```

- c. Specify the port, for example:

```
set SOLR_PORT=28983
```

Note:

- To start or stop Solr with the default port set in the script file (solr.in.cmd for Windows, solr.in.sh for Linux), navigate to the `drive:\ibi\WebFOCUS_WFI\solr\solr-8.0.0\bin\` directory and issue the following commands:

```
Solr start
Solr stop
```

For Windows, use a CMD window from the `drive:\ibi\WebFOCUS_WFI\solr\solr-8.0.0\bin\` directory.

For Linux, use a Linux shell from the `/install_directory/ibi/WebFOCUS_WFI/solr/solr-8.0.0/bin/` directory.

- To specify a custom port (for example, 28983) from the CMD window or Linux shell, issue the following commands:

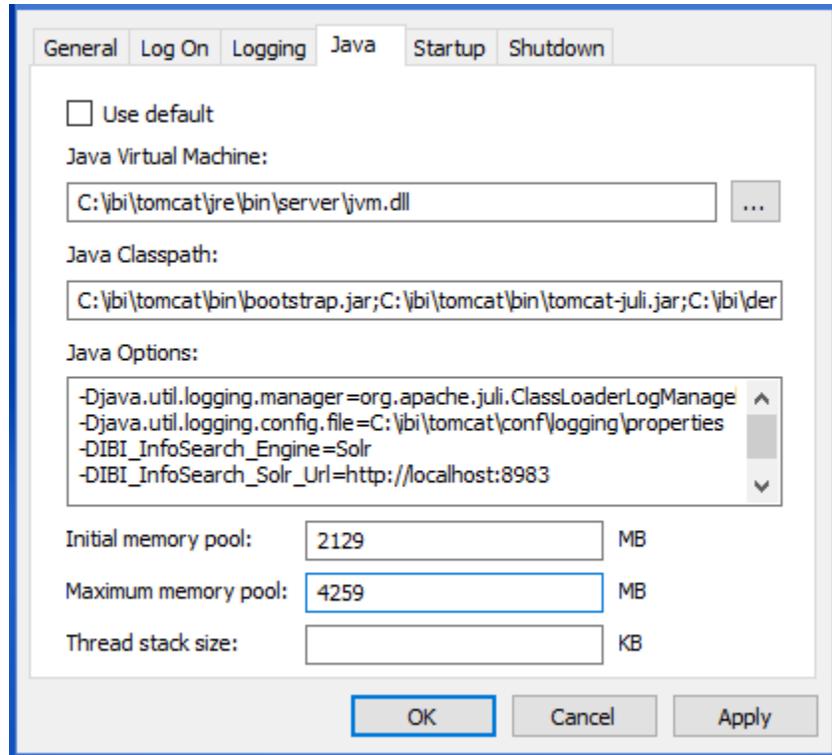
```
Solr start -p 28983
Solr stop -p 28983
```

4. Update Tomcat to include the required -D settings.
 - a. From the Information Builders Program Group, open the *Tomcat Configuration Utility*.
 - b. Click the *Java* tab.

- c. Add the following required -D settings to the Tomcat Java Options section, as shown in the following image.

```
-DIBI_InfoSearch_Engine=Solr
-DIBI_InfoSearch_Solr_Url=http://{solr_host_name}:{port}
```

For example:



5. To use Solr with WebFOCUS, start Solr first, and then start Tomcat.

Procedure: How to Index Existing Content

To index existing content in a WebFOCUS repository, such as Titles, Tags, and Summaries:

1. Sign in to your WebFOCUS instance.
2. Open a new browser tab for the web services page, for example:

```
http://localhost:25000/ibi_apps/rs?IBIRS_action=TEST
```

3. Click the *utils* button, and in the `indexRepository/IBIRS_path` field, type `/WFC/Repository`, as shown in the following image.

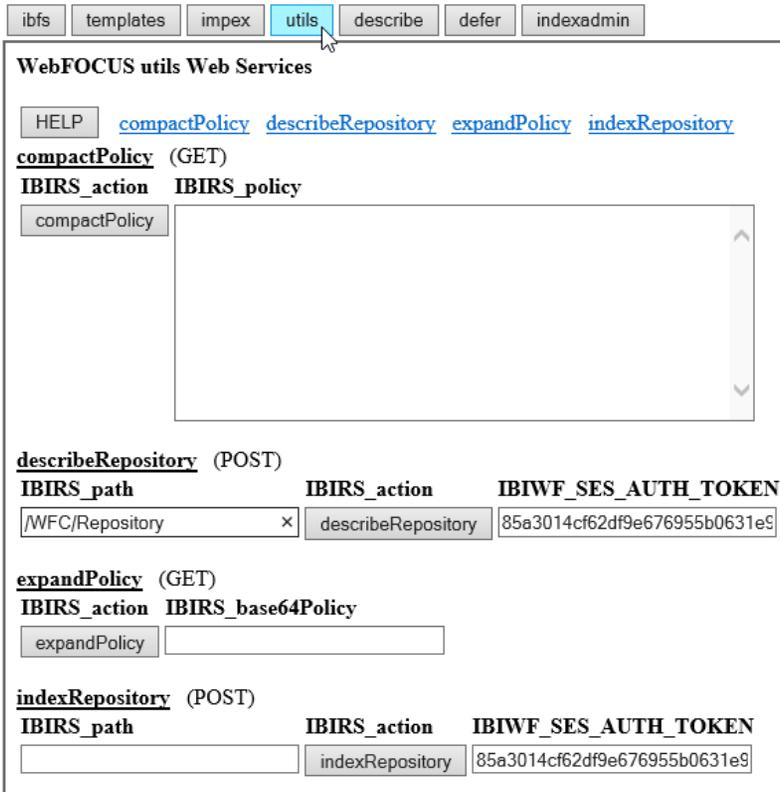
The screenshot shows the Solr Admin UI navigation bar with buttons for 'ibfs', 'templates', 'impex', 'utils', 'describe', 'defer', and 'indexadmin'. The 'utils' button is highlighted. Below the navigation bar is the 'WebFOCUS utils Web Services' section. It contains a 'HELP' button and links for 'compactPolicy', 'describeRepository', 'expandPolicy', and 'indexRepository'. The 'compactPolicy' section is expanded, showing a 'compactPolicy' button and an empty text area. The 'describeRepository' section is also expanded, showing a 'describeRepository' button and a form with three fields: 'IBIRS_path' (empty), 'IBIRS_action' (set to 'describeRepository'), and 'IBIWF_SES_AUTH_TOKEN' (set to '85a3014cf62df9e676955b0631e9'). The 'expandPolicy' section is expanded, showing an 'expandPolicy' button and an empty text area. The 'indexRepository' section is expanded, showing an 'indexRepository' button and a form with three fields: 'IBIRS_path' (set to '/WFC/Repository'), 'IBIRS_action' (set to 'indexRepository'), and 'IBIWF_SES_AUTH_TOKEN' (set to '85a3014cf62df9e676955b0631e9').

- Click `indexRepository` to complete the process.

A new window session opens with the execution results, as shown in the following code.

```
<?xml version="1.0" encoding="UTF-8"?>
<ibfsrpc language="en_US" type="simple" subreturncode="0"
returndesc="SUCCESS" returncode="10000"
name="indexRepository" _jt="IBFSResponseObject">
  <ibfsparams size="1">
    <entry value="/WFC/Repository" key="IBIRS_path"/>
  </ibfsparams>
  <rootObject _jt="string" value="Indexer Count of paths indexed:520"/>
</ibfsrpc>
```

- Click the `utils` button, and in the `describeRepository/IBIRS_path` field, type `/WFC/Repository`, as shown in the following image.



6. Click *describeRepository* to complete the process.

A new window session opens with execution results, as shown in the following code.

```
<?xml version="1.0" encoding="UTF-8"?>
<ibfsrpc _jt="IBFSresponseObject" language="en_US"
name="describeRepository"
returncode="10000" returndesc="SUCCESS" subreturncode="0" type="simple">
  <ibfsparams size="1">
    <entry key="IBIRS_path" value="/WFC/Repository"/>
  </ibfsparams>
<rootObject _jt="string" value="Processed count: 345. Described count:
310.
Have parameters count: 86. Non writable files skipped: 0"/>
</ibfsrpc>
```

7. From the WebFOCUS Administration Console menu bar, click *Clear Cache* and, when you receive a confirmation message, click *OK*.
8. Sign out of WebFOCUS and then sign back in to WebFOCUS.
9. Depending on the widget you want to use, navigate to *webfocus_instance/ibi_apps/home_widget* or *webfocus_instance/ibi_apps/navigation_widget*.

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