WebFOCUS Narrative Charts
Installation and Configuration
Release 8.2 Version 01M and Higher

December 15, 2017
## Contents

### Preface ................................................................. 5
- Documentation Conventions ....................................... 5
- Related Publications ............................................... 6
- Customer Support ..................................................... 6
- Information You Should Have ....................................... 7
- User Feedback ......................................................... 8
- Information Builders Consulting and Training .................... 8

### 1. WebFOCUS Narrative Charts ........................................ 9
- Natural Language Increases Value and Accessibility to Analytics ........................................ 9
  - Narrative Chart Example .......................................... 10

### 2. Installing WebFOCUS Narrative Charts on a Windows Environment ................. 11
- WebFOCUS Narrative Charts Requirements for Windows ............................................. 11
  - Hardware Requirements .......................................... 11
  - Software Requirements .......................................... 11
- Installing WebFOCUS Narrative Charts ........................................... 12
- Starting WebFOCUS Narrative Charts Manually ................................................ 18
- WebFOCUS Narrative Charts Directory Structure ............................................. 19
  - WebFOCUS Narrative Charts Directories ............................................. 19
- Uninstalling WebFOCUS Narrative Charts ................................................ 20
- Verifying WebFOCUS Narrative Charts ................................................ 21
  - Port Assignment .................................................. 24
  - WebFOCUS Narrative Charts Log Files .............................................. 24
- Troubleshooting the Uninstall Process .............................................. 25
- Changing the Administrator User ID and Password ........................................ 27

### 3. Installing WebFOCUS Narrative Charts on a Linux Environment ....................... 29
- WebFOCUS Narrative Charts Requirements on a Linux Environment .................................... 29
  - Installation Prerequisites ........................................ 29
  - System Resource Limits ........................................... 30
- Installing WebFOCUS Narrative Charts Using Console Mode ...................................... 30
- WebFOCUS Narrative Charts Directory Structure ........................................... 31
- WebFOCUS Narrative Charts Directories ........................................... 31
Contents

Configuring Java Memory Allocation for the Application Server ............................................. 32
Launching WebFOCUS Narrative Charts ............................................................................. 32
Starting WebFOCUS Narrative Charts Servers Manually .................................................. 33
Uninstalling WebFOCUS Narrative Charts ........................................................................ 34
This content describes how to install WebFOCUS Narrative Charts on Windows and Linux environments.

How This Manual Is Organized

This manual includes the following chapters:

<table>
<thead>
<tr>
<th>Chapter/Appendix</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>WebFOCUS Narrative Charts</td>
</tr>
<tr>
<td></td>
<td>Describes Natural language generation (NLG) and the WebFOCUS Narrative Charts analytics option.</td>
</tr>
<tr>
<td>2</td>
<td>Installing WebFOCUS Narrative Charts on a Windows Environment</td>
</tr>
<tr>
<td></td>
<td>Provides the step-by-step instructions that you need to install WebFOCUS Narrative Charts on a Windows environment.</td>
</tr>
<tr>
<td>3</td>
<td>Installing WebFOCUS Narrative Charts on a Linux Environment</td>
</tr>
<tr>
<td></td>
<td>Provides the step-by-step instructions that you need to install WebFOCUS Narrative Charts on a Linux environment.</td>
</tr>
</tbody>
</table>

Documentation Conventions

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

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>THIS TYPEFACE</td>
<td>Denotes syntax that you must enter exactly as shown.</td>
</tr>
<tr>
<td>or</td>
<td></td>
</tr>
<tr>
<td>this typeface</td>
<td></td>
</tr>
<tr>
<td>underscore</td>
<td>Indicates a default setting.</td>
</tr>
<tr>
<td>this typeface</td>
<td>Represents a placeholder (or variable), a cross-reference, or an important term. It may also indicate a button, menu item, or dialog box option that you can click or select.</td>
</tr>
<tr>
<td>Key + Key</td>
<td>Indicates keys that you must press simultaneously.</td>
</tr>
</tbody>
</table>
### Related Publications

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**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?

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Thank you, in advance, for your comments.

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Natural language generation (NLG) is a subfield of artificial intelligence (AI), which produces language as output on the basis of data input.

NLG quickly helps you get to an easily understandable explanation of report or chart output, especially where multiple dimensions and measures are involved. The narrative produced immediately adds value to data by identifying the most relevant information and conveying it through professional, conversational language. The result is intelligent narratives that efficiently communicate the insights in data that people can comprehend, act on, and trust.

The WebFOCUS Narrative Charts technology is highly configurable, enabling companies to set the appropriate level of analysis and detail based upon user and data requirements.

The WebFOCUS Narrative Charts installation provides the technology needed to analyze data sourced from a wide variety of sources, and by passing the data through algorithms and configurable settings, the result is an automatically generated professionally written narrative.

**In this chapter:**

- Natural Language Increases Value and Accessibility to Analytics

**Natural Language Increases Value and Accessibility to Analytics**

WebFOCUS includes an analytics option that leverages natural language, in the form of WebFOCUS Narrative Charts. The feature automatically translates charts into a narrative, explaining in everyday English what is happening in the data.

Narrative Charts is integrated into WebFOCUS as a charting option. This provides an NLG analytics delivery capability to a wide variety of users.
Narrative Chart Example

The following image is an example of a chart created inside InfoAssist+ with narrative above the chart.
Chapter 2

Installing WebFOCUS Narrative Charts on a Windows Environment

This topic provides the step-by-step instructions that you need to install WebFOCUS Narrative Charts on a Windows environment.

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

In this chapter:

- WebFOCUS Narrative Charts Requirements for Windows
- Installing WebFOCUS Narrative Charts
- Starting WebFOCUS Narrative Charts Manually
- WebFOCUS Narrative Charts Directory Structure
- Uninstalling WebFOCUS Narrative Charts
- Verifying WebFOCUS Narrative Charts
- Changing the Administrator User ID and Password

WebFOCUS Narrative Charts Requirements for Windows

To install WebFOCUS Narrative Charts, you must have administrator privileges. Additionally, your machine must meet the system requirements that are defined in the Hardware Requirements and Software Requirements topics.

Hardware Requirements

- Quad-core processor, 2.5 GHz minimum per core is recommended.
- 8 GB of RAM or higher is recommended.
- 10 GB of free disk space.

Software Requirements

- 64-bit Version of Windows.
Installing WebFOCUS Narrative Charts

This section describes how to install WebFOCUS Narrative Charts.

**Note:** Only one WebFOCUS Narrative Charts installation per platform is supported. Multiple installations are not permitted.

**Procedure:** How to Install WebFOCUS Narrative Charts

1. Download the installation files.
2. Double-click `wfnc_install.exe`.

   The InstallAnywhere installation program opens. After the files are extracted for the installation, the Welcome dialog box opens, as shown in the following image.

```
Welcome
☐ License Agreement
☐ Choose Install Folder
☐ Pre-Installation Summary
☐ Installing...
☐ Open Admin Page
☐ Install Complete
```

3. Click Next to continue.
The License Agreement window opens, as shown in the following image.

![License Agreement Window](image)

4. Click *I accept the terms of the License Agreement*, and then click *Next*.
The Choose Install Folder dialog box opens, as shown in the following image.

5. On the Choose Install Folder dialog box, choose the default destination folder or browse to the root folder in which to install the software.

   **Note:**

   - The folder name cannot contain spaces.
   - The folder name *NarrativeCharts* cannot be changed.
   - The product is installed under the *ibi* parent folder, for example C:\ibi.
   - The only customization allowed is the location of the parent folder, for example, you can install the product under:
     
     C:\MyPrograms\ibi

6. Click Next to continue.
The Pre-Installation Summary dialog box opens, as shown in the following image.

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

**Note:**

- The product may be configured to use different application server ports than shown in the image. Keep track of these port numbers for reference.

- The installation will not proceed if the required space (10 GB) is not available.

- The installation program installs and configures all required files under the following folder:

  ```
  drive:\ibi\NarrativeCharts
  ```

- Java Version 8 Update 102 (8u102) and Tomcat 8.0.36 are included with the WebFOCUS Narrative Charts product installation.
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 2130. 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 4261.

- You can change the Java memory allocation by running the WfNarrativeChartsw.exe Tomcat configuration utility, located in the drive:\ibi\NarrativeCharts\tomcat\bin\ folder, and selecting the Java tab.

The Open Admin Page dialog box opens, as shown in the following image.

If you select the Open the WebFOCUS Narrative Charts administration page check box, the browser page for the Yseop Manager opens at the end of the installation. The Launch WebFOCUS Narrative Charts check box is selected, by default.
8. When the installation completes, the Install Complete dialog box opens, as shown in the following image.

![Install Complete Dialog Box](image1)

9. Click *Done* to close the installation program.

If you selected the *Launch WebFOCUS Narrative Charts* check box on the Choose Install Folder dialog box, the browser page for the Yseop Manager opens at the end of the installation, as shown in the following image.

![Yseop Manager Login](image2)
Start step 10. Sign in using the default credentials:

- User ID: admin
- Password: admin

Start step 11. Click Submit.

---

**Starting WebFOCUS Narrative Charts Manually**

The installation program installs the following service based on the Tomcat installation, which is used to run WebFOCUS Narrative Charts:

- Apache Tomcat 8.0.36 for WebFOCUS Narrative Charts

To view the status of this service, launch your Windows Services program from the Control Panel and click the Standard tab. The following image highlights the WebFOCUS Narrative Charts service as it appears in the Windows Services program.

![Windows Services Window](image)

Ensure that the Apache Tomcat 8.0.36 for WebFOCUS Narrative Charts is running.
WebFOCUS Narrative Charts Directory Structure

After installation, the WebFOCUS Narrative Charts directory structure is created.

WebFOCUS Narrative Charts Directories

The default location for WebFOCUS Narrative Charts directories is:

```
drive:\ibi\NarrativeCharts
```

The NarrativeCharts directory contains the following subdirectories:

- **config**
  - Contains installation information.

- **deploy**
  - Contains the files created during deployment of the Knowledge Base.

- **jre**
  - Contains Java bundled with WebFOCUS Narrative Charts.

- **kb**
  - Contains the Yseop Manager Knowledge Base files.

- **tomcat**
  - Contains Tomcat application files. bundled with WebFOCUS Narrative Charts.

- **Uninstall**
  - Contains files used by the uninstall program.

- **utilities**
  - Contains the shortcuts that are used to launch the Administration page.

- **yseop-engine**
  - Contains the Yseop Engine software.
Uninstalling WebFOCUS Narrative Charts

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

Procedure: How to Uninstall WebFOCUS Narrative Charts

1. From the Start menu, navigate to the Uninstall shortcut, under the Information Builders program group.
2. Click Uninstall.

   The InstallAnywhere installation program opens.

   Note: If the uninstall program is not visible from the Windows Start menu, uninstall the software using the Programs and Features option on the Control Panel. Alternatively, create a shortcut to C:\ProgramData\Microsoft\Windows\Start Menu\Programs. This will open Windows Explorer with a classic view of all installed programs. You can use this to navigate to WebFOCUS Narrative Charts in the Information Builders folder, and then run the uninstall program.
3. In the Uninstall WebFOCUS Narrative Charts dialog box, click *Uninstall*, as shown in the following image.

![Uninstall WebFOCUS Narrative Charts dialog box](image)

The installation program begins and uninstalls the WebFOCUS Narrative Charts components.

4. When the uninstall completes, click *Done*.

**Verifying WebFOCUS Narrative Charts**

To verify WebFOCUS Narrative Charts, ensure that:

- Tomcat is running.
- The Yseop Manager web application is running.
- The Knowledge Base is loaded.
Procedure: How to Verify WebFOCUS Narrative Charts

1. Ensure that the Yseop Manager web application is running using the following URL:
   
   http://localhost:20000/yseop-manager

   **Note:** The product may be configured to use a different port, if port 20000 is already assigned at the time of installation. The Program Group shortcut *Launch WebFOCUS Narrative Charts* will be updated with the correct port used by the installation.

   The Yseop Manager web application opens.

2. Navigate to the Yseop Manager Administrator page using the following URL:
   
   http://localhost:20000/yseop-manager/admin/

   The Yseop Manager Administrator page opens, as shown in the following image.

   ![Yseop Manager Administrator Page](image)

3. Sign in using the default credentials:

   - User ID: admin
   - Password: admin
The Yseop Manager Administrator Knowledge Bases dialog box opens, as shown in the following image.

4. Click the savvy-kb link to test the Knowledge Base.

   **Note:** If the savvy-kb link is not available, you need to perform the following steps to manually deploy the Knowledge Base.

   a. From the Yseop Manager Administrator page (http://localhost:20000/yseop-manager/admin/), click the *Upload* link.

   b. Browse to the location where the savvy-kb-latest.zip file is located.

      The savvy-kb-latest.zip file resides in the drive:\ibi\NarrativeCharts\kb\ folder.

   c. Click *Upload*.

      A verification link displays when the upload completes, as shown in the following image.
A dialog box similar to the following image opens. This confirms that the software is properly installed and configured.

Port Assignment

By default, port 20000 is checked for availability. If the installation program detects that the port is not available, it then increases the range by 10 and checks again for availability. For example, if port 20000 is unavailable, port 20010 is then checked.

WebFOCUS Narrative Charts Log Files

WebFOCUS Narrative Charts creates the following log files in the following location for Windows:

\drive\Users\user_id\NarrativeCharts_Install_date_time.log
\drive\Users\user_id\NarrativeCharts_date_time.log

where:

user_id

Is your Windows user ID.
Is the date and time the log file was created. This log file provides information about the WebFOCUS Narrative Charts installation. If you contact Customer Support Services with an installation problem, have this file available.

Troubleshooting the Uninstall Process

If you choose to uninstall WebFOCUS Narrative Charts, and the uninstall process fails, you can follow the procedure in this section to clean up your machine.

Before performing the following procedure, ensure that you have uninstalled WebFOCUS Narrative Charts, as described in #unique_27.

Procedure: How to Manually Uninstall WebFOCUS Narrative Charts Components

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

1. Stop Tomcat.
2. Remove the Tomcat service from your machine.

   a. Locate the existing WebFOCUS Narrative Charts service. To get the service name, right-click the service in the Windows Services program and click Properties. The Properties dialog box opens, as shown in the following image, where you can right-click the service name and click Copy.

   ![Apache Tomcat 8.0.36 for WebFOCUS Narrative Charts Properties](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 "WfNarrativeCharts"

**Note:** The service name must be enclosed in double quotation marks (".

3. Launch the Windows Registry Editor, and remove the following registry keys.

   - HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Apache Software Foundation \Procrun 2.0\WfNarrativeCharts
   - HKEY_LOCAL_MACHINE\SOFTWARE\Information Builders\NarrativeCharts

4. Delete the drive:\ibi\NarrativeCharts folder.

5. Delete the C:\ProgramData\Microsoft\Windows\Start Menu\Programs\Information Builders\WebFOCUS Narrative Charts program group.

**Changing the Administrator User ID and Password**

To enhance your system security, complete the following steps to change the default Administrator ID and password, or to add additional users.

**Procedure:** **How to Change the Administrator User ID and Password**

1. Backup the users.xml file located in the drive:\ibi\NarrativeCharts\yseop-manager\ installation folder.

2. Edit the users.xml file to modify the user name and display name. A sample users.xml file is shown in the following image.

   ![Sample users.xml file](image)

   **Note:** The password is encrypted using the bcrypt algorithm.

3. To change the password, open a Command window and navigate to the drive:\ibi \NarrativeCharts\yseop-manager\ folder.

4. Run the following java command:

   ```java
   java -jar com.yseop.bcrypt-1.0.0.jar
   ```
You will be prompted for the password you want to encrypt.

5. Type the new password. You will be prompted to confirm the new password.

6. In the users.xml file, locate password="install_provided_password" and replace install_provided_password with the value generated by the bcrypt program.

   **Note:** Do not remove the beginning or ending double quotation marks ("').

7. You can add a new user by duplicating the block beginning with <user name> and ending with </user>.

8. Save and close the file.


10. Verify the updated user ID and password by navigating to the http://localhost:20000/yseop-manager/admin/ admin page and providing the new credentials.
Chapter 3

Installing WebFOCUS Narrative Charts on a Linux Environment

The following topic describes how to install WebFOCUS Narrative Charts on a Linux environment.

In this chapter:

- WebFOCUS Narrative Charts Requirements on a Linux Environment
- Installing WebFOCUS Narrative Charts Using Console Mode
- WebFOCUS Narrative Charts Directory Structure
- Configuring Java Memory Allocation for the Application Server
- Launching WebFOCUS Narrative Charts
- Starting WebFOCUS Narrative Charts Servers Manually
- Uninstalling WebFOCUS Narrative Charts

WebFOCUS Narrative Charts Requirements on a Linux Environment

The following section describes the system requirements for installing WebFOCUS Narrative Charts on a Linux environment. WebFOCUS Narrative Charts is supported on:

- Intel Linux - Kernel-2.6.32-glibc-2.6 and higher x86_64 64-bit
- Intel Linux - Kernel-3.10.0-glibc-2.17 and higher x86_64 64-bit
- Ubuntu Intel Linux - Kernel-2.6.32-glibc-2.6 and higher x86_64 64-bit

Note: Java Version 8 Update 102 (8u102) and Tomcat 8.0.36 are included with the WebFOCUS Narrative Charts product installation.

Installation Prerequisites

The following are installation prerequisites for installing WebFOCUS Narrative Charts on Linux:

- 10GB of available disk space.
- 8GB of RAM or higher is recommended.
- 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 Narrative Charts 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, enter 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 Narrative Charts Using Console Mode

The following section describes how to install WebFOCUS Narrative Charts using Console Mode.

**Note:** Only one WebFOCUS Narrative Charts installation per platform is supported. Multiple installations are not permitted.

**Procedure:** How to Install WebFOCUS Narrative Charts Using Console Mode

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

   ```
   chmod u+x wfnc_install.bin
   ```

3. Run the installation program using the following command:

   ```
   ./wfnc_install.bin -i console
   ```

   The Introduction 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.

   The Destination Folder prompt displays.

7. Accept the default destination folder for the installation. If you want to install WebFOCUS Narrative Charts 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.
   - WebFOCUS Narrative Charts uses the credentials admin/admin, by default.

8. Press Enter to continue.

   The Pre-Installation Summary window displays.

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

   The installation begins.

   During installation, the activity window indicates which ports are being configured.

   When the installation is complete, a verification message displays.

10. Press Enter to exit the Installer.

**WebFOCUS Narrative Charts Directory Structure**

After installation, the WebFOCUS Narrative Charts directory structure is created.

**WebFOCUS Narrative Charts Directories**

The default location for WebFOCUS Narrative Charts directories is:

```
/$HOME/ibi/NarrativeCharts
```

The NarrativeCharts directory contains the following subdirectories:

- `config`
  - Contains installation information.

- `deploy`
  - Contains the files created during deployment of the Knowledge Base.
Configuring Java Memory Allocation for the Application Server

For UNIX installations, the default Tomcat Java memory configuration is set to use an initial Java heap size of 128MB and a maximum Java heap size of 2048MB. These settings are located in the /ibi/NarrativeCharts/tomcat/bin/catalina.sh file. For example:

`JAVA_OPTS="-Xms128m -Xmx2048m -Djava.awt.headless=true"`

These values need to be set based on the physical memory of the machine.

Launching WebFOCUS Narrative Charts

To launch WebFOCUS Narrative Charts, type the following:

`http://host:port/yseop-manager/admin/`

For example,

`http://localhost:20000/yseop-manager/admin/`

**Note:** Enter the application server port number when using this command to start WebFOCUS Narrative Charts. The application server port number is the lowest port number displayed in the summary at the end of the WebFOCUS Narrative Charts installation.
The default port for the WebFOCUS Narrative Charts application server is 20000. It is listed during the end of the installation and also available in the installation log file.

**Note:** The product may be configured to use a different port, if port 20000 is busy. The shortcut to launch WebFOCUS Narrative Charts will be updated with the correct port used by the installation.

A shortcut to launch the WebFOCUS Narrative Charts Administration page is created in the following directory:

/$HOME/NarrativeCharts/Utilities/URLs/manager

Installation log files are under the user home directory.

/$HOME/NarrativeCharts_installs_date_time.log
/$HOME/NarrativeCharts_date_time.log

where:

*date_time*

Is the date and time the log file was created. This log file provides information about the WebFOCUS Narrative Charts installation. If you contact Customer Support Services with an installation problem, have this file available.

### Starting WebFOCUS Narrative Charts Servers Manually

The following commands are used to manually start and stop the required WebFOCUS Narrative Charts servers.

**Note:** The double periods (..) before each of the entries below indicates that the full path of the items below should be entered.

#### Application Server

- To start the WebFOCUS Narrative Charts Application Server, run:
  
  ```
  ./ibi/NarrativeCharts/tomcat/bin/startup.sh
  ```

- To stop the WebFOCUS Narrative Charts Application Server, run:
  
  ```
  ./ibi/NarrativeCharts/tomcat/bin/shutdown.sh
  ```
Uninstalling WebFOCUS Narrative Charts

To uninstall WebFOCUS Narrative Charts, either:

- Run the uninstall program using the following command:
  ```bash
dir/ibi/NarrativeCharts/Uninstall/Uninstall
  ```

- Delete the ../ibi/NarrativeCharts/Uninstall/Uninstall folder.
Index

A
Apache Tomcat 15, 18, 29

H
hardware requirements
   Linux 29
   Windows 11

I
installation steps
   Linux 30
   Windows 12

J
Java 15, 29
   configuring memory allocation 32

L
Linux
   system resource limits 30

N
Natural Language Generation (NLG) 9

S
software requirements
   Linux 29

software requirements
   Windows 11

system requirements
   for Linux 29
   for Windows 11

U
uninstalling
   on Linux 34
   on Windows 20, 25

V
verifying 21, 31
   Linux 31
   Windows 21

W
WebFOCUS Narrative Charts
   directories 19, 31
   installing on Linux 30
   installing on Windows 12
   launching 17, 32
   log files for Linux 33
   log files for Windows 24
   starting manually in Linux 33
   starting manually in Windows 18
   verifying 21, 31
Index

Y

Yseop Engine 19

Yseop Manager 17, 19
  Administrator page 22

Yseop Manager 17, 19
  Knowledge Base 23
  upload 23
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