IDOL Site Admin

Software Version 12.6

User Guide

Micro Focus

Legal notices

Copyright notice

© Copyright 2015-2020 Micro Focus or one of its affiliates.

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 check for updated documentation, visit https://www.microfocus.com/support-and-services/documentation/.

Support

Visit the MySupport portal to access contact information and details about the products, services, and support that Micro Focus offers.

This portal also provides customer self-solve capabilities. It gives you 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 MySupport portal to:

- Search for knowledge documents of interest
- Access product documentation
- View software vulnerability alerts
- Enter into discussions with other software customers
- Download software patches
- Manage software licenses, downloads, and support contracts
- Submit and track service requests
- Contact customer support
- View information about all services that Support offers

Many areas of the portal require you to sign in. If you need an account, you can create one when prompted to sign in. To learn about the different access levels the portal uses, see the Access Levels descriptions.

Contents

Chapter 1: Introduction

This section gives an overview of Micro Focus IDOL Site Admin, and its components and structure.

IDOL Site Admin

Micro Focus IDOL Site Admin is an administration component used to monitor and manage IDOL services. You can use IDOL Site Admin to start and stop services, and monitor individual services and the overall health of your IDOL services. You can also view all log files and configuration files.

For information on how to install and access IDOL Site Admin, see the *IDOL Site Admin Installation Guide*.

The IDOL Site Admin interface enables you to perform the following tasks for each service that it is used with.

- View information on any warnings or errors for your IDOL services, and view information on recent tasks (see View Errors, Warnings, and Recent Tasks, on page 8).

- Track any documents that might need reindexing because of errors during indexing and ingestion (see Track Documents, on page 13).

- Use the embedded version of IDOL Admin to perform the following tasks (see Monitor Services, on page 14):

  - View status information for your services.

  - View the index queue.

  - View log files.

  - View information about server performance and memory usage.

  - Validate the configuration file.

  - View information on the indexing fields that are defined for the documents in the data index.

  - Perform various data operations, such as querying, indexing, modifying, and so on.

  - Carry out data administration tasks.

  - Monitor queued asynchronous actions.

- Control the IDOL Server service.

- Start, stop, and restart services (see Control Services, on page 14).

- View statistics on host and service performance (see Monitor Statistics, on page 15).

- Monitor your systems (see Monitor System Notifications, on page 15).

- Manage scheduled actions (see Schedule Actions, on page 16).

- Register hosts (see Discover Hosts, on page 19).

- Register services (see Discover Services, on page 21).

- Add groups and assign groups to services (see Work With Groups, on page 23).

- Manage Lua script groups (see Manage Lua Groups, on page 25).

IDOL Site Admin provides an alternative to constructing actions and sending them from your web browser.

The IDOL Platform

At the core of IDOL Site Admin is the *Intelligent Data Operating Layer* (IDOL).

IDOL gathers and processes unstructured, semi-structured, and structured information in any format from multiple repositories using IDOL connectors and a global relational index. It can automatically form a contextual understanding of the information in real time, linking disparate data sources together based on the concepts contained within them. For example, IDOL can automatically link concepts contained in an email message to a recorded phone conversation, that can be associated with a stock trade. This information is then imported into a format that is easily searchable, adding advanced retrieval, collaboration, and personalization to an application that integrates the technology.

For more information about IDOL, see the *IDOL Getting Started Guide*.

IDOL Site Admin Architecture

IDOL Site Admin uses the following components to gather information about the IDOL services that it controls. You can view this information in the IDOL Site Admin web application user interface.
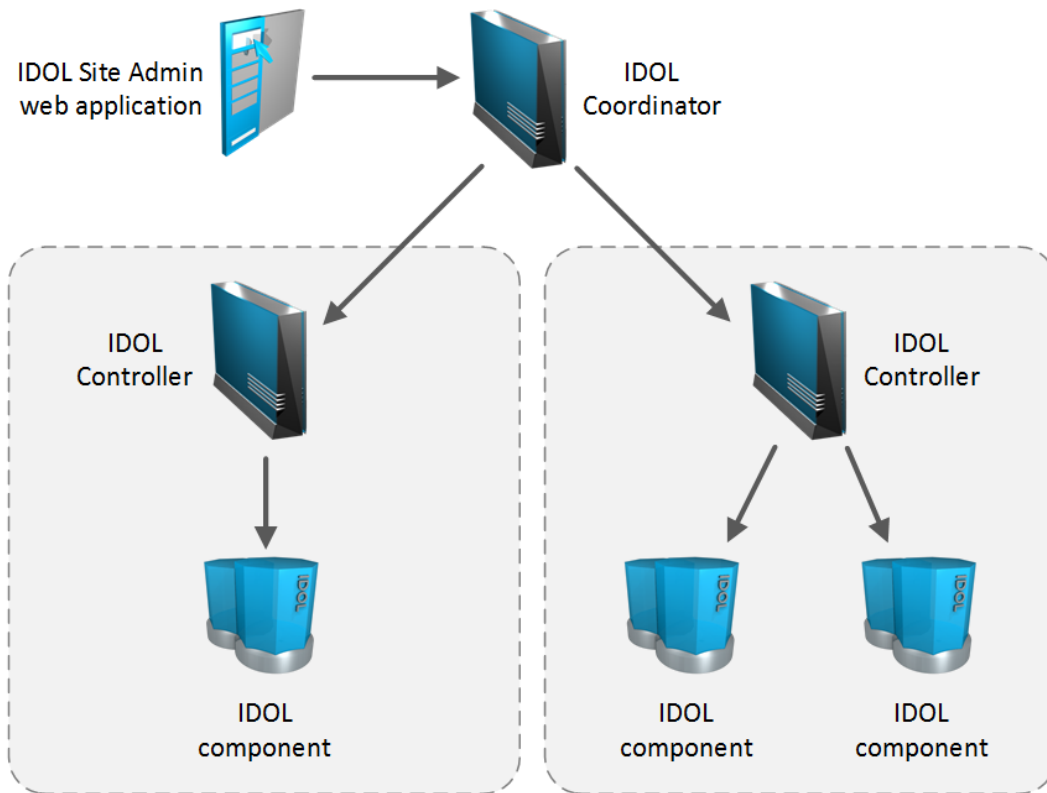
Coordinator Server

The Coordinator server is the central point from which you can view the logs and monitor the status of your components, and manage any component. The Coordinator server connects to, and collects status information from, all available Controller servers.

For more information about how to configure Coordinator, refer to the *Coordinator Reference.*

Controller Server

The Controller server performs the direct monitoring of IDOL services, and communicates with the Coordinator server. Each host that runs IDOL system components must contain a Controller server.

For more information about how to configure Controller, refer to the *Controller Reference.*

IDOL Site Admin Structure

IDOL Site Admin consists of several pages, which you open by clicking the menu options along the top of the window.
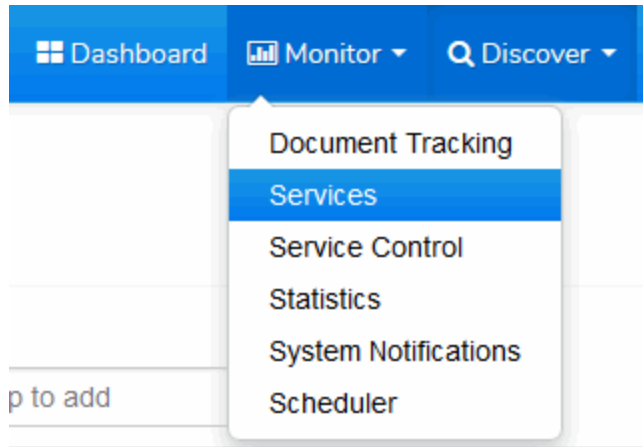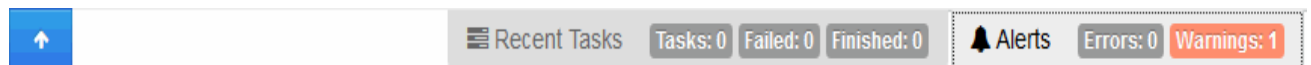
The Services page contains several subsidiary pages and tabs. The pages and tabs contain the information and tools that you need to administer your IDOL services.

View Errors, Warnings, and Recent Tasks

An information bar at the bottom of the window displays counts for tasks, errors, and warnings.

Click the arrow on the left side of the bar to open a pane in the lower section of the window. This pane displays more information on any tasks, errors, or warnings. Click **Recent Tasks** or **Alerts** to move between the sections.
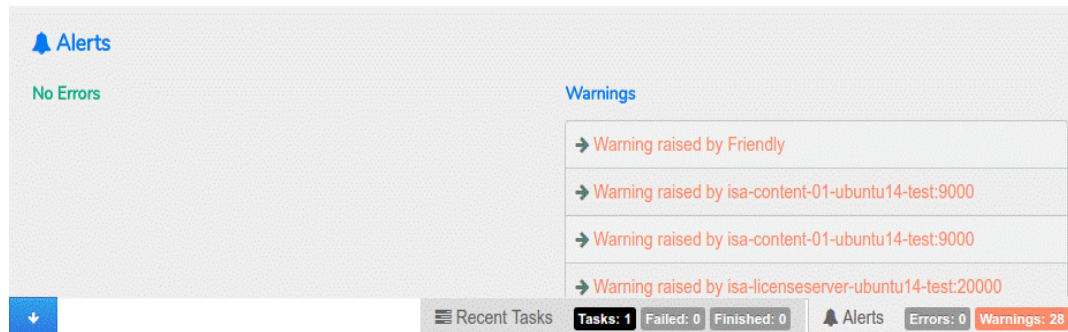
Click a link in the Errors or Warnings section to go to the relevant page in the user interface.

If an entry in your Recent Tasks lists relates to an IDOL action (for example, Sync or Backup), you can click the name of the action in the task list to view it in the form in which it was submitted to IDOL.

> **NOTE:** You can also view information on errors, warnings, and recent tasks from the IDOL Site Admin Dashboard page. You can also view information about previous tasks on the Task History page, which is available from the **Settings** link in the main navigation.

Sometimes the `IndexerGetStatus` action can no longer track a task, either because the service is unregistered (and therefore cannot be queried by Coordinator), or because you have used the `DREINITIAL` index action and the index ID numbers have changed. The message **This command can no longer be tracked** is displayed for these tasks in Recent Tasks and Task History.

View Document Tracking Information

You can view summary information about any issues that occurred during the IDOL indexing and ingestion process for your documents.

The Dashboard shows summary information for any recent documents that failed, stopped, or produced a warning during ingestion. You can view more information for errored documents and search for specific errors on the main Document Tracking page; see Track Documents, on page 13 for more information.

Edit IDOL Site Admin Configuration Settings

The first time that you log on to IDOL Site Admin, the Settings Wizard guides you through the setup process. In subsequent sessions, you can use the **Settings** page to edit the IDOL Site Admin configuration file.

The Settings page enables you to carry out the following configuration tasks:

- Specify the connection type, host, and port information for the Coordinator server that IDOL Site Admin is deployed against.

- Specify the connection type, host, port, and logon type information for the IDOL Community component that handles IDOL Site Admin user authentication.

- Choose whether you want to run IDOL Site Admin with an embedded database or a PostgreSQL database.

- Specify the host, port, database, and logon information for the PostgreSQL database that IDOL Site Admin uses for structured data storage.

- Configure a mail server to use to send email from IDOL Site Admin.

- Enable or disable email.

- Specify the amount of time for which alerts and tasks should display in the IDOL Site Admin interface.

- Specify the language in which the IDOL Site Admin interface should display.

- Specify the method used to compress log files, the number of historic log files to retain, the frequency with which new log files are created, and the maximum log file size. You can also specify the host and port information for your syslog server, send a test message to your syslog server, and switch syslog integration and IDOL Site Admin logging off or on.

  > **NOTE:** If you disable logging, IDOL Site Admin first logs that logging has been disabled and by whom.

- Set the default path for IDOL Site Admin to use to locate IDOL services on a host.

- Set the default port for IDOL Site Admin to use to locate a Controller on a host.

- Specify the host, port, database, and logon information for the PostgreSQL database that IDOL Site Admin uses for document tracking, and enable or disable document tracking.

- Test your database and server connections.

Click a heading to open or close the sections on the page.

IDOL Site Admin validates any changes to your server settings, and prompts you to correct any information that is not valid before you can save your settings.

Edit User Information

You can use the **User Management** page to create new user profiles and edit existing user profiles. To open the **User Management** page, click **Settings** in the main navigation, then choose **Users** from the list.

See the *IDOL Site Admin Installation Guide* for more details on user roles and privileges.

Access Help

For more information about IDOL Site Admin, click the **Settings** option in the main navigation, then choose **Help** or **About**.

Help Page

On the **Help** page, you can access the installed help for IDOL Site Admin and IDOL Server, including *IDOL Server Reference* and *IDOL Expert*. The *IDOL Server Reference* contains information about the

actions and configuration parameters that you can use in IDOL Server; *IDOL Expert* describes the capabilities of IDOL, and aims to get you started with using IDOL in your system.

About Page

On the **About** page, you can view copyright, version, and licensing information for IDOL Site Admin.

Chapter 2: Monitor Systems and Services

This section describes how to use IDOL Site Admin to monitor your systems and services.

Track Documents

You can use the Document Tracking page in the Monitor section of IDOL Site Admin to view the document tracking events in your IDOL system. You can filter the list for particular types of document tracking events; for example, you can display only those documents that have been deleted or committed, or you can search for documents that produced errors or warnings and therefore require reindexing or reingestion.

The Document Tracking page displays the following information for each document:
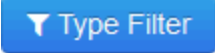
- The date and time of the tracking event.

- The event type (for example, Rejected, Committed, Indexed).

- The source (that is, the component that indexed the document).

- The ID number for the document.

- The Document Reference. This is the information that the connector stores during the indexing process. For example, the Document Reference field for a document indexed by the File System Connector contains the path of the indexed file.

Click a column header to sort the list by that field and display the list in ascending or descending order.

You can filter the list by date, document ID, and source (component type). Click the check box next to the field or fields that you want to filter by, then enter your terms. IDOL Site Admin refreshes the document tracking list to show only events that match what you entered.

You can also filter the list by event type; for example, you can display only those documents that produced errors or warnings during ingestion or indexing.

To filter by type

1. Click **▼ Type Filter**. The Select Types dialog box opens.

2. Click the check boxes next to the types that you want to display, or use the buttons at the top of the page to select predefined type groups.

3. Click **OK**.

   The Document Tracking page displays only the event types that you selected.

If an IDOL component indexed the document, you can click in the **Source** column to go to the Services page for the component in your IDOL Site Admin cluster. See Monitor Services, below for more information.

Monitor Services

You can use the embedded version of IDOL Admin on the Services page in the Monitor section of IDOL Site Admin to monitor the performance and status of a particular host and service.

Enable Autorefresh to update the information for your host and service automatically.

Choose a host, group, and service from the lists at the top of the page. The Services page refreshes with the relevant information.

The text links below the Host and Service lists take you to pages where you can view a variety of information about your services. For more information, see the *IDOL Admin User Guide*.

> **NOTE:** When you use the embedded version of IDOL Admin to run IDOL actions, IDOL Site Admin records these actions in the IDOL Site Admin log file, `siteadmin.log`.

Control Services

You can carry out service control tasks (for example, stop or restart a service) for all your services from the Service Control page.

The Service Control page provides an overview of all your services, and displays the following information for each service.

- The name of the service.

- The host name and action port number where the service is installed.

- Any groups that the service belongs to. Click to open the Groups page, where you can view and edit group information. See Groups, on page 23 for more details.

- The status of the service (for example, running or stopped).

Click an item in the lists at the top of the page to filter the list to show only services for a particular host or group.

You can use the icons in the Control section to perform the following tasks:

Start the service.

Stop the service.

Restart the service.

Go to the Services page to view more detailed information about the service, or to perform operations on the data.

Monitor Statistics

You can use the Statistics page in the Monitor section of IDOL Site Admin to view a range of performance data for your hosts and services on a single graph.

Select the host for which you want to view statistics from the list at the top of the page, then choose the statistics that you want to view from the list on the left. IDOL Site Admin updates the graph with your chosen statistics. Click a statistic again to remove it from the graph.

The different axis values are displayed in the same color as the corresponding graph line. Hover over a data point to display the statistic name and value.

You can use the following options at the top of the page to customize the display of the data.

- Click **Update** to refresh the graph. You can also choose intervals to automatically refresh the graph. Click the arrow beside **Update** to display a list with the available intervals.

- Click **Legend** to hide the legend displayed at the bottom of the graph. You can also change the default position of the legend. Click the arrow beside **Legend** to display a list with the available options.

- Click **Start** and **End** and use the calendars to specify a date or range of dates for which to display statistics.

- Click **Jump to last...** and select an option to filter the graph according to preset time periods.

Monitor System Notifications

Controller regularly runs Lua scripts to monitor services. You can view the results of this monitoring, along with general status information for your services, on the System Notifications page in IDOL Site Admin.

By default, the System Notifications page shows details for all services. You can filter the list to show only services where monitoring was successful, or only services where monitoring resulted in an error or warning.

To filter the System Notifications page

- In the **Severity** list, select the check boxes next to the notifications that you want to display.

After you filter the list, you can click **Severity** to switch between the full display and the filtered display.

You can also click an item in the **Host**, **Service Group**, or **Lua Group** lists to display only notifications for a particular host or group.

The System Notifications page shows the following information for each service.

Host	The name of the host that runs the service.
Service	The name of the service.
Service Group	The name of any groups that the service belongs to. Click ![icon] to go to the Groups page, where you can edit group information for the service.
Script Name	The name of the Lua script that the Controller runs to monitor the service.
Lua Group	The group that the script used to monitor the service belongs to. Click ![icon] to go to the Lua Groups page and edit Lua group details. See Manage Lua Groups, on page 25 for more information.
Status	The status of the service, including the time it was last monitored and whether the monitoring was successful or resulted in an error or warning.
Controls	Click ![icon] to view a full status history for the service.
	Click ![icon] to run a script again to see if a change that you have made has resolved any errors, without having to wait until the next scheduled cycle of tests.

Schedule Actions

The Scheduler page in the Monitor section of IDOL Site Admin allows you to set up schedules to send specific actions (such as connector fetch tasks, or regular maintenance tasks) to a service at regular intervals.

The Controller component actions `AddSchedule`, `EditSchedule`, `GetSchedules`, `PauseSchedule`, `RemoveSchedule`, and `ResumeSchedule` perform these tasks. For information about these actions, see the *Controller Reference*.

To set up a schedule

1. Click **New Schedule**.

   The Add New Schedule dialog box opens.

2. Type a name for your schedule.

3. In the **Host** list, click the service for which you want to schedule the action.

4. Click an option to choose the type of action that you want to schedule. You can schedule **ACI** actions or **Index** actions.

5. In the **Schedule Command** field, type the action that you want to schedule.

6. If you want to add parameters to your scheduled action, click **Add Parameter**, then enter the parameter name and value. You can add as many parameters as you need. To remove a parameter, click **-** next to the parameter.

7. Click **Next**.

8. Click 📅 , then use the calendar and date sliders to choose the date and time at which the schedule should start to run. If you want to start your schedule from the current date and time, click **Now**.

9. Click **Done**.

10. In the **Recurrence** box, type or select the amount of time that must pass after a schedule has run before it runs again. You can set up schedules to run hourly, daily, or weekly.

11. In the **Repeat Count** field, specify the number of times to run the scheduled action. If you choose **Run forever or until Schedule end**, you can click a date in the **End** list, then use the calendar to select the end date for the schedule in the same way as in step 8.

12. Click **Next** to review a summary of the schedule details.

13. Click **Finish**. IDOL Site Admin adds your new schedule to the list.

The Scheduler page displays the following information for each schedule.

Schedule name	The name of the schedule.
Host	The host name of the service to run the schedule on.
Port	The port to run the schedule on.
Scheduled command	The action to schedule, including any additional parameters.
Start	The date and time to start the schedule.
Interval	The amount of time that must pass after a schedule has run before it runs again.
Repeat Count	The number of times to run the schedule.
Finish	The date and time to stop the schedule.
Next execution	The date and time that the schedule is next due to run.

Schedule Control	You can use the icons in the Schedule Control section to start, stop, edit, or delete schedules. This column also includes details of the status of the schedule (for example, running or paused).

To search the list, type some text in the search box. The list of schedules refreshes to show only schedules that match the text that you entered. Click the arrows beside a column name to order the table by the values in that column. Click the arrows again to change the order from ascending to descending value, or from descending to ascending value.

To edit a schedule

1. Click next to the schedule that you want to edit.

   The Edit Schedule dialog box opens.

2. Edit your schedule details.

   > **NOTE:** You can edit any of the settings except for the host details and schedule name.

3. Click **Finish**.

   IDOL Site Admin updates the schedule with your new settings.

To delete a schedule

1. Click **X** next to the schedule that you want to delete.

   A confirmation dialog box opens.

2. Click **Delete**.

   IDOL Site Admin deletes the schedule and removes it from the list.

Chapter 3: Discover Hosts

This section describes how use the **Discover Hosts** page to add hosts to IDOL Site Admin.

Discover Hosts Page

Coordinator uses Simple Service Discovery Protocol (SSDP) to locate Controller servers that are not part of a cluster, or group of services, in IDOL Site Admin. You can use the Discover Hosts page to add unregistered Controller servers to a cluster. This enables you to monitor and manage services on the same host as the Controller through the IDOL Site Admin interface.

To add a Controller to a cluster

- Click the green arrow to move an unregistered Controller from the **Discovered Controllers** panel to the **Cluster** panel, or drag the Controller across.

  Alternatively, you can manually specify the details for the Controller that you want to add, then click **Add**.

To remove a Controller from a cluster

- Click the red arrow to move a registered Controller server from the **Cluster** panel to the **Discovered Controllers** panel, or drag the Controller across.

After you add a Controller server to a cluster, you can click **Services** to register the individual services that run on the host that the Controller server monitors. See Discover Services, on page 21 for more information.

Chapter 4: Discover Services

This section describes how use the **Discover Services** page to add services to IDOL Site Admin.

Discover Services Page

A service is an IDOL component that is installed on a host with a Controller. After you add a Controller server to a cluster (see Discover Hosts, on page 19 for more information), you can use the Discover Services page to register individual services with IDOL Site Admin for monitoring purposes.

To register a service

1. From the **Registered Controllers** list, select the host that you want to scan for services.

2. Enter a directory path on the host and click the magnifying glass to scan for services. Alternatively, if the host is running Windows and the IDOL components are installed as services, click **Windows Services** to scan for services.

   > **TIP:** If your servers have components installed across more than one drive, you can specify multiple paths to use for service discovery rather than having to manually modify the path each time. Click **+** to add as many **Lookup path** fields as you need, then specify the directory paths. When you click the magnifying glass, IDOL Site Admin scans all the paths.

3. IDOL Site Admin lists discovered services in the central panel. Click the green arrow next to a discovered service or drag the service to the **Registered** column to add the service to IDOL Site Admin for monitoring.

After you register a service, you can click **Groups** to go to the Discover Groups page, where you can assign that service to a group or groups. See Work With Groups, on page 23 for more information.

You can also click to add a descriptive name and notes to the service.

By default, IDOL Site Admin controls services by starting and stopping the process directly. Alternatively, you can specify an init script to use.

To specify an init script to use

1. Click next to a service. The Edit Service Control Method dialog box opens.

2. Click **Script**, then type the init script path and name.

3. Click **Edit**.

When you no longer need a service, you can unregister it.

To unregister a service

- Click the red arrow to unregister a service, or drag the service across.

Chapter 5: Groups

This section describes how to group related services together for reporting and monitoring purposes.

Work With Groups

The **Groups** page in the Discover section of IDOL Site Admin enables you to group services together. You can set up your own groups, or use the predefined common service groups that are supplied with IDOL Site Admin. You can then use the System Notifications, Service Control, and Discover Services pages in the IDOL Site Admin user interface to monitor and identify issues that relate to the whole group.

Related Topics

- Monitor System Notifications, on page 15
- Control Services, on page 14
- Discover Services, on page 21
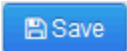
Assign Groups to Services
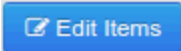
IDOL Site Admin displays a list of all available groups on the left of the page, and a list of available services on the right of the page. The list of services also indicates the groups to which each service is already assigned. You can filter the list of services to view only those services from a specific service group, a specific host, or both.

IDOL Site Admin is supplied with the following predefined common service groups:

- Administration
- Content
  - Archive
  - Current
- Distribution
- End User
- Ingestion

- Connectors
    - File System
    - HTTP
- Security

To add a service to a group

1. In the list of groups, click [Edit Items] next to the group that you want to add the service to.

2. In the list of services, select the check boxes next to the services that you want to add to the group.

3. Click [Save].

    IDOL Site Admin adds the selected services to the group.

Edit Group Information

You can set up new groups, rename or delete existing groups, add subgroups to groups, view details of all services in a group, and remove services from a group.

To set up a new group

1. Enter a name for your new group in the text box.

2. Click [+].

    IDOL Site Admin creates the new group and adds it to the list of existing groups.

To rename an existing group

1. In the groups list, click [pencil icon] next to the group that you want to rename.

    The Rename Group dialog box opens.

2. Enter the new name for the group, then click **Rename Group**.

    IDOL Site Admin updates the name of the group in the groups list.

To delete an existing group

1. In the groups list, click [X] next to the group that you want to delete.

    A confirmation dialog box opens.

2. Click **Delete Group**.

   IDOL Site Admin deletes the group and removes it from the groups list.

To add a subgroup to a group

1. In the groups list, click [icon] next to the group for which you want to add a subgroup.
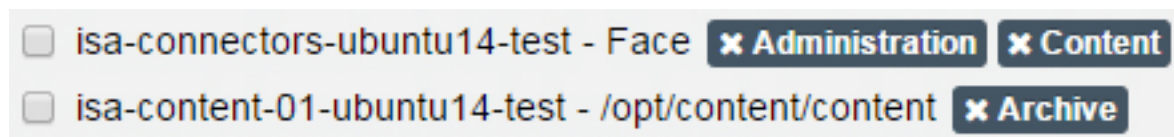
   The Add Subgroup dialog box opens.

2. Enter the name of the subgroup.

3. Click **+ Add**.

   IDOL Site Admin creates the subgroup and adds it to the hierarchy in the groups list.
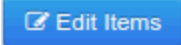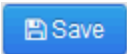
To view details of the services in a group

- Each entry in the list of services also displays icons that indicate the groups to which that service belongs.

To remove a service from a group

- Click the icon of the group that you wish to remove the service from. For example, to remove the `/opt/content/content` service from the **Archive** group in the above example, click **x Archive**.

Alternatively, you can use the following procedure to remove services from a group by using the check boxes.

1. In the list of groups, click [Edit Items] next to the group that you want to remove the service from.

2. In the list of services, select the check boxes next to the services that you want to remove from the group.

3. Click [Save].

   IDOL Site Admin removes the selected services from the group.

Manage Lua Groups

You can define Lua scripts to use to monitor services themselves in the Controller configuration file; the Coordinator then displays all the scripts in the IDOL Site Admin interface. The Lua Groups page in the

Discover section enables you to create groups of related Lua scripts (for eaxmple, all scripts used for error checking).

To set up a new Lua script group

1. Type the name of the group to add, then click [+].

    IDOL Site Admin creates the new group and adds it to the list of existing groups.

2. Click **Add Items**.

3. In the list of available Lua scripts, select the check boxes next to the scripts that you want to add to the group.

    > **NOTE:** If there are no Lua scripts listed, add the scripts to the `[LuaTasks]` section of the Controller configuration file. See the *Controller Reference* for more information.

4. Click **Save**.

    > **NOTE:** You cannot add a script to more than one group. After you add a script to a group, a label is shown next to the script indicating the group that it belongs to. Click **x** to remove the script from the group.

You can filter the list of available Lua scripts to show only those scripts that belong to a particular group.

To filter the list of scripts

-   In the **Lua Group** list, click a group. The list of Lua scripts refreshes to show only the scripts in the group that you selected.

To rename a Lua script group

1. In the group list, click [✎] next to the group that you want to rename.

    The Rename Group dialog box opens.

2. Type the new name for the group, then click **Rename Group**.

    IDOL Site Admin renames the group and updates the group list.

To delete a Lua script group

1. In the group list, click [✕] next to the group that you want to delete.

    A confirmation dialog box opens.

2. Click **Delete Group**.

    IDOL Site Admin deletes the group and removes it from the groups list.

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 User Guide (Micro Focus IDOL Site Admin 12.6)

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!