

This presentation provides an overview of the administration and configuration steps for the WebSphere Commerce Search solution. You should be familiar with the WebSphere Commerce Search solution before viewing this presentation. An overview of the search solution can be found in the Programming Model section.

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The presentation begins with an overview of the steps for deploying WebSphere Commerce Search. Following deployment is an overview of index management. The next section introduces the configuration options and the presentation concludes with some problem determination tips.

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Deployment	
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This section covers deployment of WebSphere Commerce Search.



Solr does not come with its own installer. To simplify the deployment of the Solr war file, WebSphere Commerce provides scripts that assist with deployment. There are three deployment options for your WebSphere Commerce search solution. The first option, embedded mode, applies to WebSphere Commerce Developer only. In this case it becomes part of your WebSphere Commerce EAR file and runs directly on your WebSphere Commerce test server.

The other two deployment options are standard and advanced. The standard deployment is suitable for small sites with fairly low traffic volumes. In this case, Solr is configured to run in another profile on your existing WebSphere Application Server . Similar to the embedded configuration, this option can be automatically configured during feature enablement. The advanced deployment option is used in most production scenarios. In this scenario, Solr is manually deployed on it's own WebSphere Application Server providing greater flexibility and scalability for your solution. Although it is a manual configuration process, scripts are provided to assist in the deployment.



This diagram shows how the advanced configuration gives you the most flexibility and scalability in your search solution. You can have multiple WebSphere Commerce server nodes and WebSphere Commerce search nodes with a workload balancer managing traffic to the servers. Your search index is built in a staging environment along with your WebSphere Commerce application. When updates are ready for production, the WebSphere Commerce application and data are propagated to the WebSphere Commerce index is replicated to the production master index. From there it is replicated across the WebSphere Commerce search nodes.



This slide outlines the high level steps for deploying your search server. The Administering WebSphere Commerce search section of the WebSphere Commerce Information Center contains the details. The first step is to deploy the Solr war file. For embedded and standard deployments, this is included in foundation feature enablement. For advanced deployment it is a manual process with scripts provided. The next step for standard and advanced deployments is to configure the web server for the Solr application. WebSphere Commerce must be able to send search results to the search server.

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After deployment		
 Publish your store – Starter store code in enhancement 	ents sar	
 Create the search indexes for the m – setupSearchIndex.bat -masterCa – Two-part process for advanced of 	aster catalog atalogId masterCatalogId deployment	
 Enable search based navigation – New store function selection opt 	ion under Catalog tab	
Search-based navigation 📝		
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After deploying Solr, the next step is to publish your store. The enhancement sar files provided with feature pack 2 contain examples of the storefront code needed to call the catalog search services. Once your store is published, take note of the master catalog ID. The setupSearchIndex script provided with feature pack 2 identifies the languages supported by your store and creates each required index. There is a search index created for each combination of master catalog and supported language. With the advanced deployment option, creating the search index is a two part process. The script is run on both the WebSphere Commerce server and the search server using different parameters. The final step is to enable the search-based navigation option for your store. This store function selection option is enabled using the Store Management tool. It is located on the Catalog tab.

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This section covers index management.



The standard deployment configuration, with WebSphere Commerce and Solr sharing the same application server, is appropriate for managing small indexes. When data is updated in WebSphere Commerce, the production search index must be updated. Performing index updating activities on the production index can slow the performance of customer searches. There is also a delay in updates being reflected in the search index.

The improve performance, small and medium deployments can choose to include a dedicated index building machine. This requires the advanced deployment option where Solr is installed on a separate application server. When data is updated in WebSphere Commerce, the search master machine updates the index and then uses Solr index replication to update the production search servers. While there is no performance hit to production, there is still a delay in updates being reflected in the search index.



For large index scenarios, a full staging system is recommended. All data updates and index building activities are performed within the staging environment. When the updates are tested and ready for production, the WebSphere Commerce updates are promoted to production using the StagingProp utility and the search index is replicated to the production search servers using Solr replication. There is no performance hit to the production system and the WebSphere Commerce database and search index are always synchronized.



The method for updating an index depends on the type of update being made. This slide outlines three index updating options.

Full indexing or re-indexing of the catalog takes the longest time but is required in certain scenarios. When you first load your index, or make significant changes to your catalog data, a full index update is required. If you have an authoring server you also need to perform a full index update to pick up workspace updates. Rebuilding your index occasionally, even if large changes haven't been made, is recommended to keep it performing at its best.

In between full index builds, delta re-indexing can be used to pick up small updates and make them quickly available in your staging index for testing. This takes less time than fully rebuilding the index, but should be limited to simple updates on small amounts of data. Delta updates are batched and processed when an index synchronization is requested.

In situations where data in a production index is incorrect and must be fixed you can perform an emergency update. This is essentially a delta re-index applied to your production environment. The index being updated is in your production environment, but is not a live machine. The update is applied to the index immediately rather than waiting for a batch job to run. Once the update is complete, the index is replicated across your live production indexes.

SearchConfigAndAdmin.ppt



Full index building begins with a pre-processing step. Pre-processing is used to flatten the relational data in your WebSphere Commerce database and reduce the time needed to load the index. This pre-processing step typically takes longer to complete than the index loading step. XML configuration files are used to define the flat table structure and which data requires pre-processing. These files are discussed in more detail in the configuration section of this presentation. The di-preprocess script is provided to perform the pre-processing.

Once the data has been flattened, it is ready to load into the index. The di-buildindex script calls the Solr data import handler to load the index. Indexes for each language and master catalog are loaded.

Unstructured content can only be loaded using the full index process. A variety of document types are supported by WebSphere Commerce search and the solution can be extended to support additional document types. Unstructured content also undergoes a preprocessing step and the index is loaded by the same di-buildindex script used for the catalog index load.



The diagram on this slide shows the re-indexing flow. When you update an existing product in Management Center, an event called ChangeCatalogEntry is issued. A pre-configured event listener receives the event and determines which type of re-indexing is required. Next, a ChangeCatalogNavigationView event is issued for the product. The catalog entry ID and type of re-indexing required are added to the queue for the next index synchronization.

When you preview your change from the storefront, the first search request triggers an index synchronization event. Catalog entries flagged for delta re-indexing are re-indexed through a separate background process. In store preview mode, you can see the status of the re-indexing.

	IBM
Tasks requiring a full index update	
 Committing workspace changes to the base schema 	
 Adding a new master catalog 	
 Changing the catalog hierarchy 	
 Changing values for an attribute already assigned to products 	
 Uploading an new attachment and associating it with a product 	
 Re-uploading or deleting an existing attachment associated with a product 	
 Replacing a category with a previously stored version 	
 Loading catalog data 	
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This slide summarizes the type of business tasks that require a full index update. In general, any task that affects more than one catalog entry requires a full re-index. Also any tasks related to unstructured content require a full re-index. In feature pack 2, delta re-indexing is not supported for changes committed by a workspace into the base schema. To test your workspace changes, a full re-index must be performed.

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This section covers configuration of WebSphere Commerce Search.



The search profile controls many aspects of the search behavior in the storefront. You can define multiple search profiles and use them on different pages within your store. This slide shows some examples of display options you can control with the search profile. There are three options for displaying price. The first is to display only the computed price. This means the price is always calculated by the WebSphere Commerce server and never comes from the search index. Price facets and advanced search by price are not used in the store. The second option is to use indexed prices. This is the default setting. The third option is to use computed prices for display, but still allow price facets and advanced search based on indexed prices.

	IBM
Search profile – query and result	
 Maximum rows to return 	
 Maximum time to run 	
 Search term expression providers Expression providers build portions of the Solr query SolrSearchBasedMerchandisingExpressionProvider SolrSearchProductEntitlementExpressionProvider 	
Index fields to search against	
List of fields to return in the result	
 File location: <wc_eardir>\xml\config\com.ibm.commerce.catalog-fep\</wc_eardir> 	
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The search profile also allows you to configure the search query and results. You can set the maximum number of search results to return and the maximum length of time a query can run. As discussed in the search overview and architecture presentation, the search profile is also where you define the expression builders that convert the XPath request from the storefront into a Solr search expression. Each expression provider class listed in the search profile is run by the search service façade and contributes a portion of the overall query. You can configure the search profile to call your own expression providers to customize the Solr search expression or generate a query for another search engine.

The search profile can also specify which fields to run the query against and which fields to return in the result set.

The location of the search profile is shown on the slide. You should create a custom version of this file for your changes rather than edit the file directory. The steps for changing search profile properties can be found in the WebSphere Commerce Information Center.

	IBM
Pre-processing scripts	
 Dictionary and non-dictionary attributes Number of allowable attributes is predefined 	
 Catalog IDs Store path enabled queries, sales catalogs 	
 Parent catalog groups All parent catalog groups in the catalog hierarchy Selected parent catalog group for faceting 	
 Products sets for entitlement 	
 Default offer price 	
 Unstructured content 	
 File location: <wcsearchdir>\pre-processConfig\MC_masterCatalogId\<datab< li=""> </datab<></wcsearchdir>	ase type>
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The preprocessing scripts convert data in the WebSphere Commerce database into a form that can be more efficiently imported into the Solr index. This slide summarizes the types of WebSphere Commerce data that are pre-processed. For both dictionary and nondictionary product attributes, each attribute is stored in a separate field in the index. A number of attribute fields are predefined and if these are filled, more can be allocated.

Catalog data is pre-processed so that each catalog entry is mapped to all the catalogs it belongs to. This information is used to support store path enabled queries and sales catalogs. The hierarchy for each catalog is flattened to allow search-based navigation and category faceting.

The product sets a catalog entry that its default offer price also belong part of the preprocessing scripts. These scripts also prepare the information in the attachment table for the unstructured content index.

You can extend the pre-processing scripts to prepare your custom tables for indexing. Not all custom tables need to be pre-processed. If your custom table has a simple one-to-one mapping to the CATENTRY table, you do not need to pre-process the data. It can be indexed directly from the custom table.

The location of the pre-processing scripts is shown on the slide. SearchConfigAndAdmin.ppt



The conf directory for each Solr core contains the configuration files for the index. The schema.xml file defines the index schema. You customize this file to add new fields to the index. The solrconfig.xml file contains Solr configurations options. The wc-data-config.xml file defines the queries that are used by the Data Import Handler to build the search index. If you are adding fields to the index, you need to customize this file to load your new data.



The WebSphere Commerce search solution introduces three new tables. The first table, search configuration, is populated by the index creation script. It contains general configuration details for each search index.

The second table, search attributes, contains the logical name for each catalog attribute in the search schema. There can be multiple fields in the index, such as tokenized and non-tokenized, that represent a single logical field.

The third table, search attribute properties, contains the usage information for each index field. The usage type for a field can be one or more of display, sort, facet, rank, search, filter, and catalogFilter. Each row in the table represents one usage type for a field. The search attribute and search attribute properties tables are updated automatically when you mark an attribute dictionary attribute as searchable in Management Center.



This section covers some problem determination tips.



Mistakes in configuring WebSphere Commerce search can lead to errors that prevent your storefront from displaying correctly. Problems with the web server or WebSphere Commerce server configuration files are most likely to occur when search is initially configured. This error can also occur if the search server is not running.



The most common class of problem is unexpected search results. These problems can be divided into two main root causes.

The first is that data is missing from the index. If search results are missing either products or product updates, a likely cause is the index is out of sync with the WebSphere Commerce database. Querying the Solr index directly allows you to verify whether the data is present. If not, there might have been a problem during pre-processing or index building. The pre-processing tables can be queried to verify the state of the data being loaded into the index. Store preview can be used to check whether a delta update is awaiting processing or a manual indexing step is required.

The second main cause of unexpected search results is incorrect business rules. You can use store preview or the log files to verify which search rules are being applied to adjust the search results. The rule itself might be incorrect or the start date, end date or priority might be wrong. Catalog filters handle inclusion and exclusion of products from the search and navigation results. Verify that your filter rules are correctly assigned and that the filter has been assigned to the contract. If custom expression providers are part of your solution you might have an incorrect Solr fragment being generated or the expression provider might not be correctly configured in the search profile.



The first step in debugging unexpected query results is to examine the query that was run and determine whether it is correct. All queries are logged in SystemOut.log. If you have access to Management Center, queries can also be viewed in store preview mode as can any search rules that contributed to the query. If you find a portion of the query that is incorrect, you can enable the catalog trace and check the input to and output from the expression provider that generates that portion of the query. In situations where the query looks correct, the problem might be with the data contained in the index. You can run test queries against Solr directly to examine the contents of the index. If both the query and the index are correct there might be a problem in the storefront code, in your caching solution or in the business object mediator that creates the CatalogNavigationView noun.

The rest of this presentation shows you how to debug search queries and run test queries against the index.



This slide displays the business rules that are used for demonstration purposes in the upcoming slides. There is one search rule that adjusts the search results ranking by manufacturer name. There is also one catalog filter rule that excludes a specific manufacturer name from the results.



This slide shows the results of searching for the term 'coffee' with these business rules in place. The search rule ranks Enzi products higher in the search results and the catalog filter removes all results from the Sharpson manufacturer.



This slide shows a highlighted version of a search term from the SystemOut log file. Escape characters normally seen in the log file have been replaced for readability. The search term entered by the shopper is shown in blue. The search profile defines which index fields are searched. In this example, the name and short description fields are searched. The search rule is shown in green. It boosts results from Enzi so they are ranked higher in the result set. This portion of the query is injected by the expression builder for marketing rules. The catalog filter is shown in purple. It excludes results from the Sharpson manufacturer. The number of search result hits is also returned in the log file. This is highlighted in orange at the bottom of the slide.

Search rule and	query in store p	review mode	
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earch Rule			
Search rule summar	y: coffee		
Marra	Priorit	y Start Date	End Date
Name			
Sample Customer Submits Seard Perform action "Order Se Search indexing is o	0 n Trigger - Customer searches fo earch Results".	r a phrase starting with an	y of: "coffee"
Sample Customer Submits Seard Perform action "Order So Search indexing is o Search query expression	0 n Trigger - Customer searches fo sarch Results". currently idle.	r a phrase starting with an	y of: "coffee" ∅

The same query is shown here in the search rule viewer available in store preview mode. In addition to the query, you can also see exactly which search rules are applied.

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Sample expres	sion provider trace		
		XPat	h input
invoke(SelectionCrit '{_wcf.ap='IBM_St meAndShortDescr ='0';_wcf.search.e: cf.search.price.mir xclude.facet='';_wc '/CatalogNavigatio	eria) ENTRY XPath ore_CatalogEntrySearch';_wcf.se iption';_wcf.search.term='coffee';_ kclude.term=";_wcf.search.exclud nimum=";_wcf.search.price.maxim of.search.sort=";_wcf.search.meta nView', access profile 'IBM_Store	arch.profile='IBM_find(_wcf.search.category=' e.type=";_wcf.search.r hum=";_wcf.search.fac he"}/CatalogNavigation _CatalogEntrySearch'	CatalogEntryByNa ';_wcf.search.type nanufacturer='';_w et='';_wcf.search.e View', XPath key
runSearchActivities	ENTRY coffee		
runSearchActivities	RETURN bq=mfName_ntk_cs:"Er	ızi"^1.5	
Adding boost query:	'mfName_ntk_cs:"Enzi"^1.5'		
Internal boost querie	s: '[mfName_ntk_cs:"Enzi"^1.5]'	(Search
invoke(SelectionCrite	eria) RETURN		fragment output
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On this slide, you see the input and output for the SolrSearchBasedMerchandisingExpressionProvider. This data can be viewed by enabling the catalog trace component.



Running a query directly against Solr can help to determine whether the problem is in the index itself or in the result processing or display. You can enter a Solr query into a browser window and the Solr response object is displayed as the result.

query in	Luite							
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To get a deeper look into the index, you can install the Lucene index tool called Luke. Luke is not shipped as part of WebSphere Commerce feature pack 2 and must be separately downloaded and installed. This screen capture shows the results of the query on the previous slide as seen in Luke.



The WebSphere Commerce search solution adds one new trace component for the services dealing with search term association management. The majority of the search runtime trace statements can be viewed by enabling the existing catalog, marketing and foundation trace components.

	IBM
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Temporary table schema definition http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.developer.doc/concepts/csdsearchindex	temptables.htm
 Working with the WebSphere Commerce search configuration file http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.developer.doc/tasks/tsdwcsearchworking 	gwith.htm
Store preview - http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.management-center.doc/concepts/cpvpr	eview.htm
Debugging WebSphere Commerce search - http://publib.boulder.ibm.com/infocenter/wchelp/v7r0m0/topic/com.ibm.commerce.developer.doc/tasks/tsdsearchdebug.httr	<u>n</u>
Luke - Lucene Index Toolbox – <u>http://code.google.com/p/luke/</u>	
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This slide contains some useful references.

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The presentation began with an overview of the steps for deploying WebSphere Commerce Search. Following deployment was an overview of index management. The next section introduced the configuration options and the presentation concluded with some problem determination tips.

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