Basic IDOL with BYOL

Software Version 12.11

Getting Started with Basic IDOL with BYOL on AWS Marketplace

MICRO FOCUS®

Legal notices

© Copyright 2022-2023 Micro Focus or one of its affiliates.

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

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:

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

Many areas of the portal require you to sign in. If you need an account, you can create one when prompted to sign in.

About this PDF version of online Help

This document is a PDF version of the online help, and is provided so you can easily print multiple topics or read the online help. Because this content was originally created to be viewed as online help in a web browser, some topics may not be formatted properly. Some interactive topics may not be present in this PDF version. Those topics can be successfully printed from within the online help.

Contents

Introduction

Micro Focus IDOL is a data platform that converts your source content to an index of useful data that you can search and analyze.

Micro Focus has added Basic IDOL with BYOL (Bring Your Own License) to the Amazon Web Services (AWS) Marketplace, so that you can easily deploy a simple IDOL setup on hardware managed by AWS. Micro Focus provides an Amazon Machine Image (AMI) with the Content, View Server, and Community components, the Find and SiteAdmin User Interfaces, and NiFi ingestion pre-installed.

To use Basic IDOL with BYOL, you must have an IDOL license suitable for AWS usage, which you can purchase from Micro Focus. You can then deploy the Basic IDOL with BYOL stack through the AWS Marketplace.

This document describes how to get started with Basic IDOL with BYOL on AWS, but does not attempt to describe all of the features that IDOL provides. If you are not familiar with IDOL, you can use this guide in conjunction with other IDOL documentation.

Which IDOL Components are Available?

The following IDOL components are included:

- Content component
- Community component
- Agentstore component
- View Server
- Find
- IDOL Site Admin
- NiFi Ingest

The NiFi ingest deployment includes the following connectors:

- File System Connector
- Web Connector
- Amazon S3 Connector
- Exchange OData Connector
- OneDrive Connector
- SharePoint OData Connector
- Teams Connector

Prerequisites

To deploy a Basic IDOL with BYOL stack, you must have:

- A valid Micro Focus IDOL license. You can purchase this from Micro Focus.

  > **IMPORTANT:** When you request a license from Support, you must request a license suitable for AWS usage. This style of license ensures that the License Server correctly detects that it is running on AWS.

- An Amazon S3 bucket to store your license key file. The Basic IDOL with BYOL stack retrieves this license when you create it.

- (Optional) An Amazon S3 bucket that contains the files that you want to ingest into your IDOL system.

  > **NOTE:** The Basic IDOL with BYOL stack deploys a sample workflow with a NiFi Amazon S3 connector and ingest flow configured. If you do not want to use the S3 connector, you can use a dummy value for the S3 bucket, and the system deploys as expected. However, after deployment you must modify your NiFi flow to correct the errors that occur because the bucket is not available.

For information about how to create an Amazon S3 bucket, refer to the AWS documentation.

Create a New Basic IDOL with BYOL Instance

This section provides a brief overview of how to subscribe to the Basic IDOL with BYOL product from the Amazon Marketplace, and start your first instance of Basic IDOL. After you have subscribed to Basic IDOL with BYOL you can create as many instances as you want through the AWS Management Console. Micro Focus recommends referring to the Amazon documentation for comprehensive information about using and configuring Amazon Web Services.

To subscribe to Basic IDOL with BYOL and create a new instance

1. Go to the Amazon Marketplace and search for Micro Focus Basic IDOL with BYOL.

2. On the Micro Focus Basic IDOL with BYOL product page, click **Continue to Subscribe**.

   The Subscribe to this software page opens.

3. Read the license agreement and, if you agree to the terms, click **Accept Terms**.

   Amazon processes your subscription request. The page is updated when the subscription becomes active. The Expiration date is not applicable (N/A) because your usage depends on the license that you purchase separately from Micro Focus.

4. Click **Continue to Configuration**.

   The Configure this software page opens.

5. In the **Region** box, choose a region in which to deploy the software. For example, you might prefer to have the software deployed in an AWS data center that is close to your location.

6. Click **Continue to Launch**.

   The Launch this software page opens.

7. In the **Choose Action** list select **Launch CloudFormation**, and then click **Launch**.

   The Amazon Web Service management console opens on the Create stack page.

   The Basic IDOL with BYOL product uses a CloudFormation template, which is pre-selected.

8. Under **Prerequisite - Prepare template**, check that **Template is ready** is selected.

9. Under **Specify template**, check that **Amazon S3 URL** is selected, and that the **Amazon S3 URL** has the URL of the Basic IDOL with BYOL CloudFormation template. You can click **View in Designer** to view the template.

10. Click **Next**.

    The Specify stack details page opens.

11. In the **Stack name** box, type a name for your stack.

12. In the **Parameters** section, provide the parameters that the CloudFormation template uses for your Basic IDOL with BYOL instance. You must provide these values for the instance to launch successfully. The following table describes the available parameters and provides more

information about how to set these values.

Section	Parameter	Description
InstanceType Configuration		Settings for the AWS EC2 instance.
	ServerInstanceType	The AWS EC2 InstanceType for the server instance. This value determines the specifications of the machine that the software is deployed on. Basic IDOL with BYOL requires at least 4GB of memory, so some of the instance types are unavailable. Micro Focus recommends the c5d.2xlarge instance type as a good starting point but you can choose a different instance type depending on your requirements.
License Configuration		Settings for the location of your IDOL license.
	LicenseKeyBucketName	The name of an Amazon S3 bucket that contains the license key that you want to use to run the Basic IDOL with BYOL components.
	LicenseKeyBucketPath	The path to the license key in the bucket.
	LicenseKeyBucketRegion	The AWS region where your S3 bucket is hosted.
Self-Signed Certificate Configuration		Settings for the self-signed certificate that your Basic IDOL with BYOL instance uses in the HTTPS endpoint for your IDOL components.
	Country	The value to use in the Country field of the self-signed certificate.
	StateProvinceCounty	The value to use in the State/Province/County field of the self-signed certificate.
	Locality	The value to use in the Locality field of the self-signed certificate.
	Organisation	The value to use in the Organisation field of the self-signed certificate.
	OrganisationalUnit	The value to use in the Organisational Unit field of the self-signed certificate.
	EmailAddress	The value to use in the Email Address field of the self-signed certificate.
NiFi Ingest Configuration		Settings for the IDOL NiFi Ingest component in your Basic IDOL with BYOL.
	NiFiS3Bucket	The name of an Amazon S3 bucket that contains

Section	Parameter	Description
		the files that you want to ingest into IDOL through NiFi Ingest.
		NOTE: The Basic IDOL with BYOL stack deploys a sample workflow with a NiFi Amazon S3 connector and ingest flow configured. If you do not want to use the S3 connector, you can use a dummy value for the S3 bucket, and the system deploys as expected. However, after deployment you must modify your NiFi flow to correct the errors that occur because the bucket is not available.
Other parameters		
	PrivateSubnetCIDR	The block of IP addresses, in CIDR notation, to use for the private subnet that the IDOL components in the Basic IDOL with BYOL instance use (that is, the IP addresses that the IDOL components use to connect to each other). This block must not overlap with PublicSubnetCIDR.
	PublicAccessCIDR	The block of IP addresses, in CIDR notation, that are allowed to connect to the public interfaces in your stack (such as Find and IDOL Site Admin). You can set this parameter to `0.0.0.0/0` to grant open network access to the stack's endpoints.
	PublicSubnetCIDR	The block of IP addresses, in CIDR notation, to use for the public subnet that the IDOL components in the Basic IDOL with BYOL stack instance use. This option allows you to assign your deployment IP addresses so that they do not clash with other stacks you have deployed in Amazon EC2. This block must not overlap with PrivateSubnetCIDR.
	VPCCIDR	The block of IP addresses, in CIDR notation, for the Virtual Private Cloud.

Complete the values for these parameters, and then click **Next**.

The Configure stack options page opens.

13. On the Configure stack options page, you can set standard AWS options for your stack, such as tags and permissions, and what to do if the stack fails. For more information about these settings, click the AWS help links on this page.

   Update any parameters that you want to change, or accept the default values. Click **Next**.

   The Review *StackName* page opens.

14. Check all the details for your stack. You can click **Edit** for a section if you want to change any values. Otherwise, scroll to the **Capabilities** section. Read and click the checkbox for each capability to acknowledge the requirements.

15. Click **Create stack**.

   The CloudFormation console opens, displaying the creation events, with any errors. Deployment might take several minutes.

   When the deployment is successful you will see a CREATE_COMPLETE success message for your stack (with the name that you specified) in the list of stacks, and an associated network stack.

Troubleshoot Issues During Stack Creation

The following list includes some basic checks to perform if your stack does not deploy successfully:

- Check that there is a value for every parameter in the CloudFormation template parameters. The parameters are all required, and the stack deployment will fail if you do not provide values for parameters that do not have a default value.

- Check that the license bucket is accessible, and that the license key is valid. The components in the stack will not start up if the license is not valid, and the deployment will fail.

- Check for any AWS limitations on your account usage, either in total or for the region that you are attempting to deploy on.

Configure the NiFi S3 Ingest Bucket

When you create your stack, you set the name of your NiFiS3Bucket. The bucket that you use for this configuration must grant access to the CloudFormation stack. To ensure this, you can:

- Use an open/public S3 bucket.

- Grant access to the bucket from the Virtual Private Cloud (VPC) endpoint of your Basic IDOL with BYOL stack.

   > **NOTE:** The stack does not configure this option automatically, so you must update it manually.

You can find the VPC endpoint for your stack in the resources section of the nested network stack. The resource is of type `AWS::EC2::VPCEndpoint`.

For more information, refer to the [AWS documentation](#).

Run IDOL Components

When you have your stack running successfully, you can view and access the available IDOL endpoints.

To find the endpoints, find the CloudFormation console for your Basic IDOL with BYOL stack and click the Outputs tab. This tab has a list of the available endpoints.

The following endpoints are available:

- IDOL Content component
- Find
- IDOL Site Admin

There is also a note in the outputs list about how to find your Find and IDOL Site Admin initial password. This password is automatically generated during stack creation, and is stored on the EC2 instance.

In addition, you can access the NiFi ingest component. The NiFi password is stored in the home directory of the ec2-user, in a text file named `nifi-password`.

Access Initial Passwords

The following procedures describe how to access the initial passwords for Find and Site Admin (which share a password), and NiFi Ingest.

To access the Find and IDOL Site Admin initial password

1. On the CloudFormation console, go to the **Outputs** tab. Find the initial password key, and copy the path to the password listed in the value column. Copy or save this path so that you can access it easily in a later step.

2. On the CloudFormation console, go to the **Resources** tab.

3. Find the EC2 instance in the resources list. The EC2 instance has the type **AWS::EC2::Instance**. Click the link in the Physical ID column.

   The EC2 console opens.

4. In the list of EC2 instance, select the checkbox for the EC2 instance for your Basic IDOL with BYOL stack, and click **Connect**.

   The Connect to instance page opens.

5. Go to the Session Manager tab and then click **Connect**.

   A session manager window opens.

6. Type the following command into the session manager command line:

```
more path/to/initialpassword
```

where `path/to/initialpassword` is the path that you copied from the CloudFormation console. For example:

```
more /opt/idol-docker/passwords/admin_password.txt
```

This command displays the contents of the password file. Copy the password value and save it to use to log in to Find and IDOL Site Admin.

7. Click Terminate to terminate the session.

> **TIP:** After you log in for the first time, you can change the admin password for Find and IDOL Site Admin by sending an action to the Community component in the IDOL Site Admin interface.

To access the NiFi Ingest initial password

1. On the CloudFormation console, go to the **Outputs** tab. Find the initial password key, and copy the path to the password listed in the value column. Copy or save this path so that you can access it easily in a later step.

2. On the CloudFormation console, go to the **Resources** tab.

3. Find the EC2 instance in the resources list. The EC2 instance has the type **AWS::EC2::Instance**. Click the link in the Physical ID column.

   The EC2 console opens.

4. In the list of EC2 instance, select the checkbox for the EC2 instance for your Basic IDOL with BYOL stack, and click **Connect**.

   The Connect to instance page opens.

5. Go to the Session Manager tab and then click **Connect**.

   A session manager window opens.

6. Similarly, the NiFi password is stored in the home directory of the ec2-user, in a text file named `nifi-password`. To access it, type the following command into the session manager command line:

```
sudo more /home/ec2-user/nifi-password
```

> **TIP:** If you log in to the EC2 instance as ec2-user, you do not need to use sudo. This command assumes that you use the default login, which is root.

> **TIP:** After you log in to NiFi, you can change the NiFi access password from the Ingest Tools page.

Log in to Find

Find is a basic user interface that you can use to search data that you ingest into your Basic IDOL with BYOL system.

For more information about Find, refer to the *Find Administration Guide*.

The following procedure describes how to log in to Find.

To log in to Find

1. In the CloudFormation console, go to the **Outputs** tab.

2. Next to the Find key, click the link in the value column.

   Your browser is likely to display a security warning because the server uses a self-signed SSL certificate that it generated when it created the stack. After you acknowledge the warning, the Find login page opens.

3. In the username box, type **admin**.

4. In the password box, paste the password that you copied from the EC2 instance, as described in Access Initial Passwords, on page 10.

5. Click **Login**.

   Find opens.

Log in to IDOL Site Admin

IDOL Site Admin allows you to administer the IDOL components in the Basic IDOL with BYOL stack. For example, you can use it to manage users and roles through the IDOL Community component.

For more information about how to use IDOL Site Admin, refer to the *IDOL Site Admin User Guide*.

The following procedure describes how to log in to IDOL Site Admin.

To log in to IDOL Site Admin

1. In the CloudFormation console, go to the **Outputs** tab.

2. Next to the SiteAdmin key, click the link in the value column.

   Your browser is likely to display a security warning because the server uses a self-signed SSL certificate that it generated when it created the stack. After you acknowledge the warning, the IDOL Site Admin login page opens.

3. In the username box, type **admin**.

4. In the password box, paste the password that you copied from the EC2 instance, as described in Access Initial Passwords, on page 10.

5. Click **Login**.

   IDOL Site Admin opens.

Access the IDOL Content Component

The IDOL Content component provides the central index and query functionality for IDOL.

You can use the Content endpoint in Basic IDOL with BYOL to query the IDOL Content component directly, rather than using the Find user interface, and perform some additional operations on the data in your index. For more information about how to use Content, refer to the *IDOL Content Component Reference*, and the *IDOL Server Administration Guide*.

The following procedure describes how to access and send actions to the IDOL Content component.

To access the IDOL Content component

1. In the CloudFormation console, go to the **Outputs** tab.

2. Next to the Content key, click the link in the value column.

    Your browser is likely to display a security warning because the server uses a self-signed SSL certificate that it generated when it created the stack. After you acknowledge the warning, an ACI response is displayed.

    This is the Content component link. You can add IDOL Content actions to the end of this link to access Content directly. For example:

    ```
    https://AWS_IPAddress:Port/content/action=getversion
    ```

    where `AWS_IPAddress` is the public IPv4 DNS address of your stack, and `Port` is the port.

Access NiFi Ingest

NiFi ingest is a set of IDOL components based on Apache NiFi, that allow you to fetch, process, and index documents. In the Basic IDOL with BYOL stack, the NiFi Ingest instance comes with a flow that ingests documents from the Amazon S3 bucket that you specified when you set up the instance.

You can also modify the flow, if you want additional features. For more information, refer to the *IDOL NiFi Ingest Help*.

The following procedure describes how to access IDOL NiFi Ingest.

To log in to NiFi

1. In the CloudFormation console, go to the **Outputs** tab.

2. For any of the listed endpoints, copy the IP address.

3. In your browser, paste in the public IPv4 DNS address and then add **/IDOLIngest**. For example:

    ```
    https://AWS_IPAddress/IDOLIngest
    ```

    Your browser is likely to display a security warning because the server uses a self-signed SSL certificate that it generated when it created the stack. After you acknowledge the warning, the IDOL Ingest home page opens.

4. Click NiFi to go to the Apache NiFi login page.

5. In the username box, type **nifi**.

6. In the password box, paste the password that you copied from the EC2 instance, as described in Access Initial Passwords, on page 10.

7. Click Log in.

    IDOL NiFi Ingest Opens.

Documentation

The following documentation provides more information about IDOL.

- For information about the Content, Community, and View Server components, refer to:
  - *IDOL Server Administration Guide*
  - *IDOL Content Component Reference*
  - *IDOL Community Component Reference*
  - *View Server Reference*
  - *IDOL Expert*
- For information about Find, refer to the *Find Administration Guide*.
- For information about IDOL Site Admin, refer to the *IDOL Site Admin Installation Guide*, and *IDOL Site Admin User Guide*.
- For information about IDOL Ingest components, refer to the *IDOL NiFi Ingest Help*.
- For information about using connectors, refer to the IDOL Connector Documentation. A help system is available for each IDOL Connector.

IDOL documentation is available from https://www.microfocus.com/documentation/idol.

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 Micro Focus Basic IDOL with BYOL 12.11 Getting Started with Basic IDOL with BYOL on AWS Marketplace

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!