

6.2

Luna Imaging Inc.

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Insight® + LUNA

# Installation and Configuration Guide

6.2.1 Revision

## Insight® + LUNA

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## Table of Contents

<b>TABLE OF CONTENTS.....</b>	<b>3</b>
<b>LIST OF TABLES .....</b>	<b>9</b>
<b>LIST OF FIGURES .....</b>	<b>9</b>
<b><u>WELCOME TO INSIGHT AND LUNA.....</u></b>	<b><u>10</u></b>
<b>FINDING INSTALLERS AND TOOLS ON THE CDS .....</b>	<b>14</b>
<b>LOCATIONS OF COMMONLY USED COMPONENTS .....</b>	<b>15</b>
<b>BASIC STRUCTURE FOR THE INSIGHT SERVER COMPONENTS.....</b>	<b>16</b>
<b>BASIC STRUCTURE OF THE MEDIA MANAGER SOURCE FILE DIRECTORY ....</b>	<b>17</b>
<b><u>INSTALLING INSIGHT.....</u></b>	<b><u>19</u></b>
<b>INSTALLATION PROCESS .....</b>	<b>19</b>
<b>PREREQUISITES .....</b>	<b>19</b>
<b>CHOOSING THE FEATURES YOU PLAN TO INSTALL .....</b>	<b>20</b>
<b>SUGGESTED INSTALLATION METHODOLOGY .....</b>	<b>20</b>
<b>SPACE REQUIREMENTS .....</b>	<b>20</b>
<b>SPACE FOR INSTALLATION .....</b>	<b>20</b>
<b>SPACE FOR IMAGES AND MULTIMEDIA .....</b>	<b>20</b>
<b>SPACE FOR THE DATABASE .....</b>	<b>21</b>
<b>PRE-INSTALLATION CHECKLIST.....</b>	<b>21</b>
<b>OBTAINING THE HOSTNAME.....</b>	<b>21</b>
<b>SETTING UP YOUR DATABASE .....</b>	<b>22</b>
<b>MICROSOFT SQL SERVER.....</b>	<b>22</b>
<b>ORACLE .....</b>	<b>24</b>
<b>MYSQL 4.1.....</b>	<b>25</b>
<b>BACKING UP YOUR DATABASES .....</b>	<b>25</b>
<b>INSTALLING ON WINDOWS .....</b>	<b>25</b>
<b>INSTALLING ON SOLARIS OR LINUX .....</b>	<b>25</b>
<b>RUNNING THE INSIGHT SUITE INSTALLER .....</b>	<b>25</b>
<b>WHERE TO FIND THE INSTALLER.....</b>	<b>26</b>
<b>RUNNING THE INSTALLER .....</b>	<b>26</b>
<b>SELECTING AN INSTALLATION TYPE .....</b>	<b>26</b>
<b>CHOOSING AN INSTALLATION LOCATION ..</b>	<b>27</b>
<b>CREATING A SHORTCUT FOLDER .....</b>	<b>28</b>
<b>CONFIGURING THE SERVER COMPONENTS</b>	<b>28</b>
<b>SELECTING A USER MANAGER ADDRESS .</b>	<b>29</b>
<b>SPECIFYING AN ADMINISTRATIVE USERNAME AND PASSWORD FOR INSIGHT</b>	<b>30</b>
<b>SPECIFYING AN INSTITUTION ID.....</b>	<b>30</b>
<b>CHOOSING A DATABASE TYPE .....</b>	<b>31</b>
<b>CONFIGURING TOMCAT 5.0 .....</b>	<b>31</b>
<b>CHOOSING A HOSTNAME AND PORT FOR TOMCAT .....</b>	<b>32</b>
<b>REVIEW YOUR TOMCAT &amp; USER MANAGER SETTINGS .....</b>	<b>32</b>
<b>CONFIGURING THE MEDIA MANAGER.....</b>	<b>33</b>
<b>SPECIFYING A MEDIA DIRECTORY.....</b>	<b>33</b>
<b>CONFIGURING THE COLLECTION OR PERSONAL INSIGHT MANAGER.....</b>	<b>33</b>
<b>CHOOSING CATALOG TEMPLATE(S) .....</b>	<b>34</b>
<b>DATABASE INFORMATION .....</b>	<b>34</b>
<b>DATABASE USERNAME AND PASSWORD ..</b>	<b>35</b>
<b>NAME YOUR SERVER AND CHOOSE A PORT .....</b>	<b>35</b>
<b>TESTING THE DATABASE CONNECTION....</b>	<b>36</b>
<b>CREATING THE INSIGHT COLLECTION MANAGER DATABASE .....</b>	<b>37</b>
<b>CONFIGURING THE USER MANAGER .....</b>	<b>38</b>
<b>DATABASE INFORMATION .....</b>	<b>38</b>
<b>DATABASE USERNAME AND PASSWORD ..</b>	<b>39</b>
<b>TESTING THE DATABASE CONNECTION....</b>	<b>39</b>
<b>CREATING THE INSIGHT USER MANAGER DATABASE .....</b>	<b>40</b>
<b>CONFIGURING BROWSERINSIGHT.....</b>	<b>41</b>
<b>USER MANAGER ADDRESS .....</b>	<b>42</b>
<b>CONFIGURING THE XML GATEWAY.....</b>	<b>42</b>
<b>FINAL REVIEW .....</b>	<b>43</b>
<b>INSTALLING FILES.....</b>	<b>43</b>
<b>REGISTERING INSIGHT AND REQUESTING YOUR LICENSE KEY .....</b>	<b>44</b>
<b>COMPLETING THE INSTALL.....</b>	<b>45</b>
<b>LICENSING .....</b>	<b>46</b>
<b>INSTALLATION ERRORS .....</b>	<b>46</b>
<b>NEXT STEPS FOR A NEW INSTALLATION ..</b>	<b>46</b>
<b>NEXT STEPS WHEN ADDING A NEW COLLECTION OR PERSONAL INSIGHT MANAGER .....</b>	<b>47</b>
<b><u>INSTALLING LUNA .....</u></b>	<b><u>48</u></b>

MY UPLOADS SERVER TESTING.....	74
ADDING INSIGHT CONTENT TO LUNA.....	75
LET'S GET STARTED .....	78

## **MIGRATING INSIGHT MEDIA GROUPS AND SHARES TO LUNA** .....82

INTRODUCTION .....	82
--------------------	----

## **MANAGING LUNA WITH THE ADMINISTRATOR TOOLS**.....86

INTRODUCTION .....	86
MANAGING USER RIGHTS AND ACCESS PRIVILEGES .....	86
CREDENTIALS .....	88
APPLICATION CONFIGURATION .....	96
MAINTENANCE MODE .....	96
ADMIN ACCOUNTS .....	97

## **VIRTUAL COLLECTIONS IN LUNA**.....98

INTRODUCTION .....	98
UPDATING YOUR INSIGHT DATABASE ...	98
PREPARING YOUR VIRTUAL COLLECTION WITH THE ADMINISTRATOR TOOLS.....	98

## **ADDING LUNA AND UPGRADING INSIGHT 6.2**.....101

INTRODUCTION .....	101
PREPARING YOUR SYSTEM FOR THE UPGRADE .....	101
CHECK YOUR SYSTEM FOR JAVA .....	101
BACKING UP YOUR DATABASES .....	102
SHUTTING DOWN YOUR INSIGHT SERVER COMPONENTS .....	102
RUNNING THE UPGRADE INSTALLER....	102
RUNNING THE GUI INSTALLER.....	102
RUNNING THE COMMAND-LINE INSTALLER .....	102
CHOOSING INSTALLATION LOCATION .....	102
VERIFY INSTALLATION CHOICES.....	103
RUNNING UPGRADE.....	103

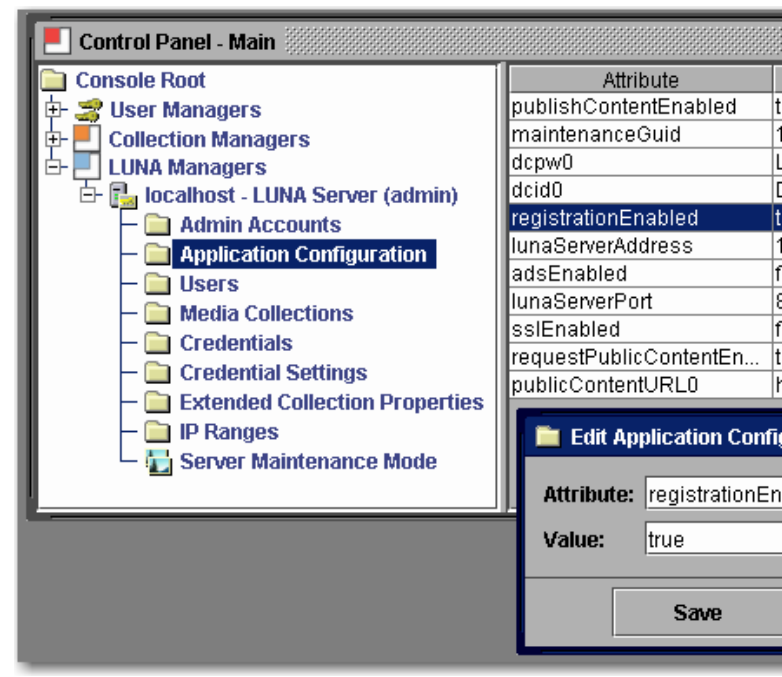
LICENSING .....	103
INSTALLATION ERRORS .....	103
ADDING SUPPORT FOR SOURCE IMAGES AND MISCELLANEOUS FILE TYPES .....	103
INSIGHT ADMINISTRATOR TOOLS	
UPGRADE NOTE.....	106
DEPLOY DIRECTOR UPDATES.....	106
CLIENT INSTALLERS .....	107
INSIGHT JAVA CLIENT HELP .....	107

## **UPGRADING FROM INSIGHT 4.X**..... 108

## **YOU WILL NEED THE INSIGHTSERVER.DAT FOR EACH COLLECTION YOU PLAN TO MIGRATE THE COLLECTION LEVEL GROUPS FROM.** ..... 147

## **YOU NEED THE INSIGHTUSERSERVER.DAT FOR THE USER MANAGER.** ..... 147

## **LUNA SELF REGISTRATION**..... 152



## ..... 161



**DURING THE INSTALLATION  
PROCESS THESE SETTINGS  
WERE DEFINED. IF YOU NEED TO  
MAKE MODIFICATIONS TO ANY OF  
THESE PROPERTIES, BE AWARE  
THAT IT WILL AFFECT HOW LUNA  
FUNCTIONS. IF YOU ARE UNSURE  
OF WHAT A PARTICULAR SETTING  
IS FOR, DO NOT CHANGE IT  
WITHOUT FIRST CONTACTING  
LUNA SUPPORT FOR AN  
EXPLANATION OF THE SETTING. 161**

<b>PRE-INSTALLATION CHECKLIST: .....</b>	<b>167</b>
<b>PREPARING YOUR SYSTEM FOR THE UPGRADE .....</b>	<b>169</b>
BACKING UP YOUR DATABASES .....	169
BACKING UP YOUR CONFIGURATION FILES .....	169
ACCEPTING ALL PENDING CHANGES IN INSCRIBE .....	169
<b>SHUTTING DOWN YOUR COLLECTION MANAGER .....</b>	<b>171</b>
<b>INSIGHT VRA v1 MODEL UPGRADE SCRIPT.....</b>	<b>171</b>
TO RUN THE VRA UPGRADE SCRIPT .....	172
TESTING THE VRA UPGRADE SCRIPT .....	172
<b>RUNNING THE DATABASE UPGRADE SCRIPT.....</b>	<b>172</b>
TO RUN THE USER MANAGER UPGRADE SCRIPT .....	173
TO RUN THE COLLECTION MANAGER UPGRADE SCRIPT .....	174
<b>RUNNING THE UPGRADE INSTALLER....</b>	<b>175</b>
RUNNING THE INSTALLER.....	175
SELECTING THE COMPONENTS TO UPGRADE .....	176
CHOOSING INSTALLATION LOCATION .....	177
CREATING A SHORTCUT FOLDER .....	177
PREPARE YOUR DATABASES.....	177
UPGRADING THE USER MANAGER .....	178
SPECIFY YOUR USER MANAGER ADDRESS .....	178
SPECIFY YOUR INSIGHT 4.X USER MANAGER DIRECTORY .....	179
VERIFYING SUCCESSFUL DATABASE UPGRADE .....	179
UPGRADING THE COLLECTION MANAGER .....	180

SPECIFY YOUR INSIGHT 4.X COLLECTION MANAGER DIRECTORY .....	180
SPECIFYING A COLLECTION SHORT NAME AND SERVER NAME IF YOU HAVEN'T ALREADY .....	181
VERIFYING SUCCESSFUL DATABASE UPGRADE .....	181
UPGRADING MULTIPLE COLLECTION MANAGERS .....	182
INSTALLING THE BUNDLED VERSION OF TOMCAT 5 .....	182
UPGRADING THE SECURE MEDIA SERVER & INSTALLING THE MEDIA MANAGER .....	183
INSTALLING THE MEDIA MANAGER .....	183
SPECIFYING THE SECURE MEDIA SERVER CONFIGURATION FILE.....	184
SPECIFYING THE MEDIA DIRECTORY.....	184
UPGRADING BROWSERINSIGHT .....	185
LOCATE YOUR BROWSERINSIGHT.CONF.	185
UPGRADING THE XML GATEWAY.....	185
SPECIFYING THE LOCATION FOR THE 4.1 XML GATEWAY CONFIGURATION FILE .	186
VERIFY INSTALLATION CHOICES .....	186
RUNNING UPGRADE .....	186
LICENSING .....	187
INSTALLATION ERRORS .....	187
INSTALLING NEW COMPONENTS.....	188
<b>RUNNING THE INSIGHT ADMINISTRATOR TOOLS AND THE INDEXER.....</b>	<b>188</b>
<b>TESTING YOUR 5.0 UPGRADE .....</b>	<b>190</b>
<b>CONFIGURING YOUR COLLECTIONS FOR ACCESS USING INSIGHT STUDIO.....</b>	<b>191</b>
DEFINING A MASTER SERVER ENTRY ....	191
CONFIRMING YOU HAVE THE ADMINISTRATIVE RIGHTS TO MANAGE A COLLECTION WITH INSIGHT STUDIO.....	192
ADDING THE USER TO THE USER MANAGER .....	193
ENABLING A USER TO MANAGE USERS WITH INSIGHT STUDIO.....	195
<b>UPGRADING FROM IIS OR APACHE TO THE INSIGHT MEDIA MANAGER .....</b>	<b>196</b>
UPDATING YOUR INSIGHT COLLECTION PROFILES TO USE THE MEDIA MANAGER	196
USING THE MEDIA MANAGER WITH CONTENT FROM MULTIPLE LEGACY COLLECTIONS .....	198
CONFIGURE AN INSIGHT COLLECTION MANAGER TO USE THE INSIGHT MEDIA MANAGER .....	198

CONFIGURING BROWSERINSIGHT TO USE THE INSIGHT MEDIA MANAGER .....	199
TESTING YOUR NEW MEDIA MANAGER ..	200
<b>ENABLING MEDIA SECURITY .....</b>	<b>200</b>
TO ENABLE MEDIA SECURITY IN THE MEDIA MANAGER.....	201
ENABLE THE BROWSER SECURITY PROPERTY .....	202
USING YOUR OWN VERSION OF TOMCAT OR USING RESIN.....	203
NEXT STEPS .....	203

## **STARTING THE INSIGHT SERVER COMPONENTS FOR THE FIRST TIME (IN CONSOLE MODE).....**

TESTING THE INSTALLATION OF THE USER MANAGER .....	204
TESTING THE COLLECTION AND PERSONAL INSIGHT MANAGERS .....	205
STARTING INSIGHT STUDIO.....	206
TESTING APACHE TOMCAT 5.0.19 .....	207
IDENTIFYING EXCEPTIONS WHILE WATCHING THE TOMCAT CONSOLE.....	209
TESTING THE JPEG2000 DECODER & THE MEDIA MANAGER .....	209
TESTING THAT THE MEDIA MANAGER IS INSTALLED. ....	209
TESTING THE JPEG2000 DECODER: .....	210
TROUBLESHOOTING AN UNSATISFIED LINK ERROR ON SOLARIS .....	213
TROUBLESHOOTING A MEDIA FILE COMPROMISED ERROR .....	214
TESTING YOUR BROWSERINSIGHT INSTALLATION.....	215
TROUBLESHOOTING COLLECTIONS NOT DISPLAYING IN BROWSERINSIGHT .....	216
TESTING THE XML GATEWAY.....	216

## **PACKAGING AND DISTRIBUTING THE JAVA CLIENT .....**

REPACKAGING THE JAVA CLIENT WITH YOUR USER MANAGER ADDRESS .....	220
DISTRIBUTING THE JAVA CLIENT USING DEPLOY DIRECTOR.....	220

UPDATING DEPLOY DIRECTOR WITH THE 6.2 VERSION OF THE INSIGHT JAVA CLIENT .....	221
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## **CONFIGURING THE COLLECTION AND USER MANAGERS TO RUN AS SERVICES.....**

INSTALLING THE INSIGHT SERVER COMPONENTS AS A SERVICE ON WINDOWS.....	222
INSTALLING THE INSIGHT SERVER COMPONENTS AS A SERVICE ON LINUX OR SOLARIS .....	226

## **APACHE TOMCAT 5.0.....**

TOMCAT MANAGER .....	228
TOMCAT CONFIGURATION FILES .....	228
THE TOMCAT SERVER.XML.....	228
THE TOMCAT CONTEXT AREA.....	229
WEB.XML FILES.....	229
TOMCAT HELP FILES.....	229
MANAGING TOMCAT ADMINISTRATIVE USERS .....	229

## **CONFIGURING BROWSERINSIGHT.....**

DIFFERENCES IN BROWSERINSIGHT BETWEEN 4.1 AND 5.X.....	230
CONFIGURING BROWSERINSIGHT BY EDITING THE BROWSERINSIGHT.CONF CONFIGURATION FILE .....	231
LOCATING THE BROWSERINSIGHT.CONF CONFIGURATION FILE.....	231
CONFIGURING BROWSERINSIGHT TO BYPASS THE LOGIN PAGE .....	231
CONFIGURING BROWSERINSIGHT TO CLOSE THE COLLECTION SELECTION WINDOW AFTER OPENING A COLLECTION IN THE GROUP WORKSPACE OR IMAGE WORKSPACE .....	232
CONFIGURE COLLECTION MANAGER SERVER DATABASE SETTINGS .....	232

**ENABLING MEDIA FILE  
DELETION.....235**

**CONFIGURING THE XML  
GATEWAY.....237**

CONFIGURING THE XML GATEWAY WITH  
A USERNAME AND A CONNECTION TO A  
USER MANAGER.....237  
CONFIGURING THE SIMPLE SEARCH  
EXAMPLE SERVLET.....238

**DEPLOY DIRECTOR .....239**

INSTALLATION OF DEPLOY DIRECTOR 239  
CONFIGURING DEPLOY DIRECTOR FOR  
INSIGHT.....242  
STARTING DEPLOY DIRECTOR AND THE  
DEPLOY DIRECTOR ADMINISTRATIVE  
CLIENT.....242  
ON WINDOWS .....242  
ON SOLARIS / LINUX.....243  
CUSTOMIZING THE INSIGHT.DAT FILE FOR  
USE WITHIN DEPLOY DIRECTOR .....245  
VERIFYING YOUR INSTALLATION .....250  
ENABLING DEPLOY DIRECTOR'S REMOTE  
LAUNCH FUNCTIONALITY .....250  
POST INSTALLATION .....252  
UPGRADING THE INSIGHT CLIENT  
BUNDLE TO 5.6.....252

**CONFIGURING  
BROWSERINSIGHT TO USE SSL  
.....257**

ADDITIONAL INSTALLATION  
INSTRUCTIONS FOR RESIN.....259  
ADDITIONAL INSTALLATION  
INSTRUCTIONS FOR APACHE'S TOMCAT  
4.X.....259

**USING YOUR OWN VERSION OF  
APACHE'S TOMCAT OR USING  
CAUCHO'S RESIN .....261**

PREREQUISITES .....261  
SUPPORTED VERSIONS OF SUN'S JDK .....261

SUPPORTED VERSIONS OF TOMCAT ..... 261  
SUPPORTED VERSIONS OF RESIN..... 261  
**INSIGHT SERVLET COMPONENTS..... 262**  
LOCATING THE SERVLET COMPONENTS  
CONTEXT FILES..... 262  
**CONFIGURING THE INSIGHT SERVLET  
COMPONENTS TO RUN IN A CUSTOM  
VERSION OF TOMCAT ..... 262**  
ADDING THE INSIGHT SERVLET CONTEXTS  
TO THE TOMCAT 4.X SERVER.XML ..... 262  
ADDING THE INSIGHT SERVLET CONTEXTS  
TO AN INSTANCE OF TOMCAT 5 ..... 263  
**CONFIGURING THE INSIGHT SERVLET  
COMPONENTS TO RUN CAUCHO'S RESIN  
APPLICATION SERVER ..... 264**  
ADDING THE INSIGHT SERVLET CONTEXTS  
TO THE RESIN.CONF..... 264  
**TESTING YOUR CUSTOM CONFIGURATION  
..... 265**  
**TROUBLESHOOTING ERRORS WITH THE  
XML GATEWAY ..... 265**  
**TROUBLESHOOTING ERRORS WITH RESIN  
AND THE MEDIA MANAGER..... 266**

**DEBUGGING THE INSIGHT  
SERVER COMPONENTS..... 267**

**CHECKING THE VERSION OF ALL  
INSTALLED COMPONENTS ..... 268**  
**ENABLING DEBUG INFORMATION..... 269**  
TO CHANGE THE DEBUG LEVEL..... 269  
DATABASE DEBUG MODE..... 270  
STARTING THE USER MANAGER IN  
CONSOLE MODE..... 270  
STARTING THE COLLECTION MANAGER OR  
PERSONAL INSIGHT MANAGER IN CONSOLE  
MODE ..... 271  
DEBUGGING A DATABASE CONNECTION FOR  
THE USER, COLLECTION, OR PERSONAL  
INSIGHT MANAGERS ..... 272  
TESTING THE NETWORK CONNECTION... 275  
ENABLING DEBUG INFORMATION FOR  
BROWSERINSIGHT..... 276

**PERFORMANCE TUNING FOR  
THE INSIGHT/ INSCRIBE  
SERVER COMPONENTS..... 278**

<b>INSCRIBE PERFORMANCE ENHANCEMENTS.....</b>	<b>278</b>
---	------------

## **REPACKAGING & ADVANCED CONFIGURATION OF THE INSIGHT CLIENT APPLICATIONS.....**

<b>PACKAGING AND DISTRIBUTING THE INSIGHT CLIENT APPLICATIONS.....</b>	<b>280</b>
PACKAGING THE INSIGHT CLIENT APPLICATIONS .....	281
<b>INSIGHT CLIENT APPLICATION CONFIGURATION FILES .....</b>	<b>283</b>
USE-BASED CONFIGURATIONS .....	284
<b>COMMON PROPERTIES FOR THE INSIGHT CLIENT APPLICATIONS.....</b>	<b>290</b>

## **CONFIGURING INSIGHT'S ADVANCED AUTHENTICATION AND AUTHORIZATION FEATURES.....**

<b>PURE LDAP .....</b>	<b>291</b>
<b>KERBEROS &amp; LDAP OR (WINDOWS® ACTIVE DIRECTORY) .....</b>	<b>291</b>
ENABLING SIMPLE LDAP AUTHENTICATION FOR THE INSIGHT USER MANAGER.....	292
ASSOCIATING LDAP USERS WITH INSIGHT USERS .....	295
USING LDAP SSL CERTIFICATES WITH INSIGHT.....	295
<b>KERBEROS &amp; LDAP AUTHENTICATION AND AUTHORIZATION .....</b>	<b>296</b>
KERBEROS AUTHENTICATION - OVERVIEW .....	296
SPECIFYING THE KERBEROS SETTINGS....	297

<b>ENABLING KERBEROS AUTHENTICATION FOR THE INSIGHT USER MANAGER .....</b>	<b>298</b>
<b>LDAP AUTHORIZATION - OVERVIEW .....</b>	<b>298</b>
<b>SPECIFYING THE LDAP SETTINGS .....</b>	<b>299</b>
<b>ENABLING LDAP AUTHORIZATION FOR THE INSIGHT USER MANAGER .....</b>	<b>301</b>
<b>INTERACTION OF KERBEROS &amp; LDAP USERS AND USERS IN THE INSIGHT USER TABLE .....</b>	<b>301</b>
<b>USING THE INSIGHT ADMINISTRATOR TOOL TO IDENTIFY INSIGHT ACCESS PROFILES</b>	<b>301</b>
<b>WINDOWS® ACTIVE DIRECTORY &amp; INSIGHT USER ACCOUNT INFORMATION .....</b>	<b>303</b>
<b>RESTORING THE DEFAULT SECURITY CONFIGURATION FOR INSIGHT .....</b>	<b>305</b>
<b>RESOURCES.....</b>	<b>307</b>
<b>INSIGHT SECURITY RELEASE – IMPLEMENTATION WORKSHEET.....</b>	<b>308</b>

## **JDBC DATABASE CONFIGURATION PROPERTIES.....**

## **INTRODUCTION TO THE INSIGHT CONFIGURATION FILES.....**

<b>COLLECTION MANAGER AND PERSONAL INSIGHT MANAGER .....</b>	<b>312</b>
<b>USER MANAGER .....</b>	<b>313</b>
<b>MEDIA MANAGER.....</b>	<b>314</b>
<b>BROWSERINSIGHT.....</b>	<b>314</b>
<b>XML GATEWAY .....</b>	<b>316</b>
<b>INSIGHT CLIENT APPLICATIONS .....</b>	<b>316</b>
<b>INSIGHT ADMINISTRATOR TOOLS.....</b>	<b>316</b>

## **INDEX .....**

## List of Tables

Table 1: Distribution CD Contents.....	14
Table 2: Pre-Installation Checklist .....	21
Table 3: Microsoft SQL Server Database Creation Worksheet.....	23
Table 4: Oracle Database Creation Worksheet .....	24
Table 5: MySQL Database Creation Worksheet .....	25
Table 6: Pre-Installation Checklist .....	167
Table 7: Locations for the Insight VRA 4.1 to 5.0 Upgrade Script .....	172
Table 8: Locations for the User Manager 4.1 - 5.0 Upgrade Script .....	173
Table 9: Locations for the Collection Manager 4.1 - 5.0 Upgrade Script .....	174
Table 10: Common Installation Locations for the Insight User Manager.....	204
Table 11: Common Installation Locations for the Insight Collection Manager.....	205
Table 12: Common Installation Locations for the Personal Insight Manager .....	205
Table 14: Common Installation Locations for Tomcat.....	207
Table 15: Required Entries for a Collection or Server Entry in BrowserInsight .....	233
Table 16: Optional Entries for a Collection or Server Entry .....	233
Table 17: Debug Levels for the Insight Server Components.....	269
Table 18: Database Debug Mode settings .....	270
Table 19: Default Ports for Insight Server Components.....	275
Table 20: Locations of the Client Installers.....	280
Table 21: Client Configuration Files.....	283
Table 22: Default Client Installation Locations .....	283
Table 23: Common Temporary Locations Per Platform .....	286
Table 24: Operation System User Preference Directory .....	287
Table 25: Consolidated Properties by Client Application .....	290
Table 26: XML Gateway Configuration Files.....	316

## List of Figures

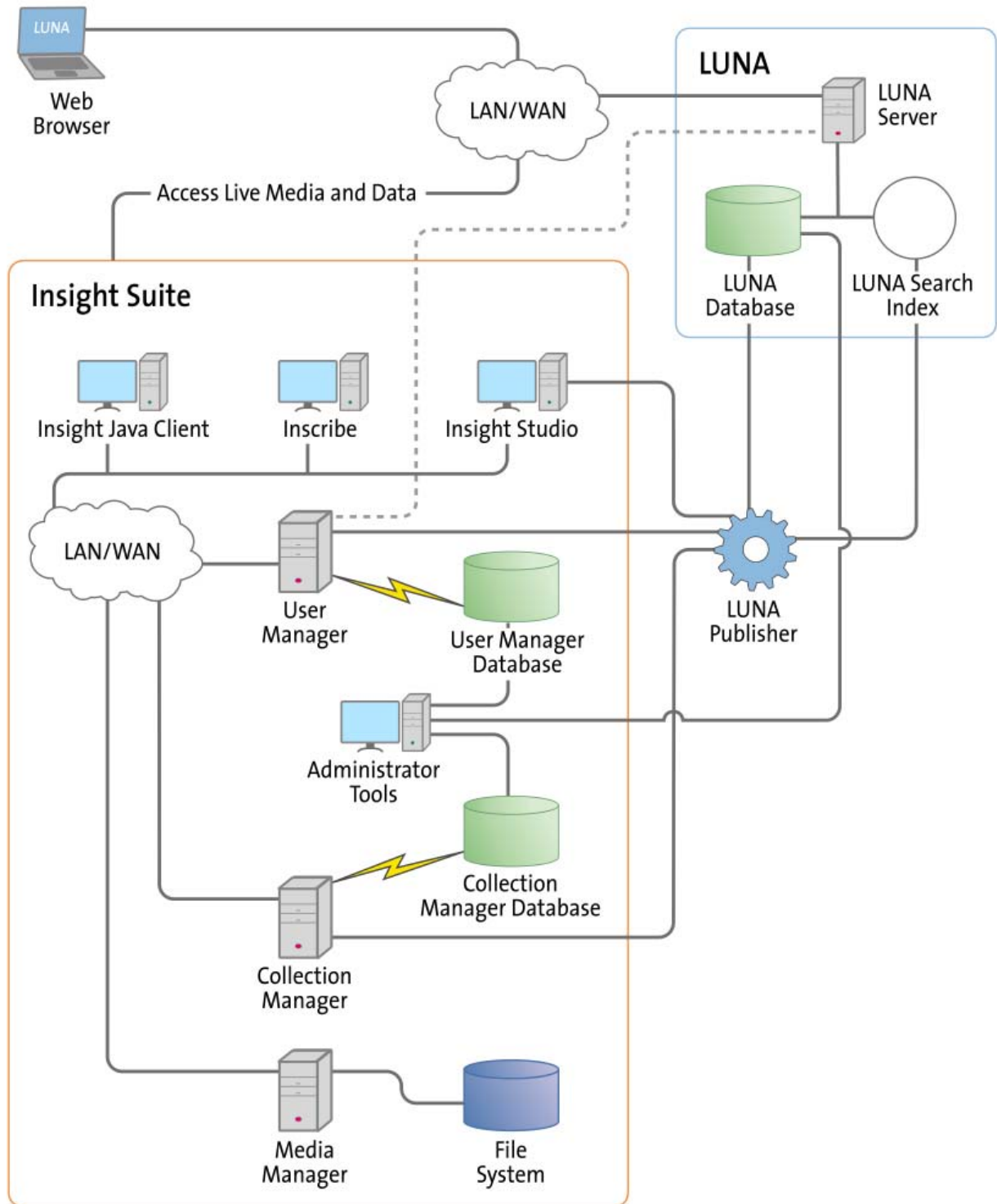
Figure 1: Insight and LUNA Component Diagram .....	11
Figure 2: Insight Installation Directory <installation directory> .....	16
Figure 3: Media Manager Directory Organization.....	17
Figure 4: Enabling SQL Server & Windows Authentication for Microsoft SQL Server.....	23
Figure 5: BrowserInsight Attributes .....	203
Figure 6: Finding Media Manager Context in Tomcat.....	210
Figure 7: Failure to find Media Manager Context in Tomcat .....	210
Figure 8: Successful Test of the JPEG2000 decoder .....	211
Figure 9: Missing JPEG2000 Library Error .....	211
Figure 10: Media Manager Message with Ticketed Security Disabled .....	212
Figure 11: Media Manager Message with Ticketed Security Enabled .....	213
Figure 12: Media File Compromised Error .....	215
Figure 13: Windows Service Manager.....	225

# Welcome to Insight and LUNA

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This document is intended mainly for system administrators and secondarily for Insight administrators to provide context and information on how to Install & Configure Insight and LUNA. Readers are expected to have a basic knowledge of the UNIX / Windows Operating Systems, Microsoft SQL Server / Oracle Databases / MySQL, and Apache Tomcat and Jboss JSP Server.

**Figure 1: Insight and LUNA Component Diagram**



## **LUNA Components are as follow:**

**LUNA Publisher:** Schedules and is used to pull data out of the Insight Collection Manager, storing it in an XML format. The LUNA Publisher then converts the archive data into a Lucene index for each collection and merges all Collection indexes into one single search index. Once merged, the LUNA Server is placed into a maintenance mode and the newly merged index replaces the existing one.

**LUNA** is the dynamic web based front end to Insight collections. With LUNA, users can perform simple keyword searches as well as more complex structured queries, and control how they view, browse, and organize their results to create groups and presentations. LUNA includes the Web 2.0 tools your users are demanding which enable them to save and share their work by linking and embedding any view, image, group, or presentation.

## **Insight's Components are as follow:**

**User Manager:** The User Manager functions as a single point of entry for all Insight Collections and Personal Insight Managers. It consolidates the functions of authentication and authorization for all shared resources within Insight and for LUNA. The User Manager can integrate with an existing security infrastructure if an institution already has a single sign-on solution in place. The User Manager also provides access to resources such as shared folders and groups within Insight. LUNA enables end-user management of viewing preferences, and storage folders for media groups and presentations.

**Collection Manager:** The Insight Collection Manager provides a common interface between client requests and the underlying data repository. Each Collection Manager may contain multiple collections and Virtual Collections of consistent or heterogeneous structures. The Collection Manager also functions as a broker between the clients (the Insight Java Client, Inscribe data editor, Studio (LUNA Publisher and XML Gateway) and the underlying database, coordinating search requests, and data updates.

**Personal Insight Manager:** The Personal Insight Manager is a specialized version of the Collection Manager which supports the creation of Personal Collections with the Insight Java Client.

**Media Manager:** The Insight Media Manager is built around a basic JSP Server, and manages access to Insight's media content. The Media Manager supports direct upload of processed content and also manages access to the JPEG2000 wavelet images that power Insight's Image Workspace.

**Insight Browser & Java Clients:** The Insight Browser and Java Clients are the core of Insight. They provide the end-user interface for searching, viewing, and managing images, audio, video, and other media. These clients provide unique tools to interact with visual content. The Java Client also provides end-user collection building tools with Personal Insight and the ability to create Virtual Collections – a subset of content with different access levels.

**Inscribe®:** The optional Inscribe data editor is an end-user cataloging tool designed to support all of an institution's cataloging needs. The Inscribe data editor includes built-in support for controlled vocabularies, date and numeric validation, and complex data relationships. Inscribe



also supports an institution's workflow requirements by facilitating the publishing and review processes.

**Studio:** Studio provides collection administrators with the tools to build and manage collections. Studio is a wizard-based tool supporting batch processing of media, batch import of metadata, user management, catalog template creation and management, and other basic functions. The **LUNA Publisher** is accessible from within the Studio client.

**Administrator Tools:** The Insight Administrator Tools allow a collection administrator to dynamically manage collections. Components of the Insight Administrator Tools include tools for batch media processing, user and resource management, data indexing, and configuring of the search and user interface.

**JPEG2000 Wavelet Encoder:** The Administrator Tools and Studio include a JPEG2000 Wavelet Encoder. Wavelet encoded images improve performance when accessing large images, reduce storage requirements, and optimize network usage on image delivery.

**Insight XML Gateway:** The XML Gateway provides a web-services based interface for searching and retrieving content stored within Insight collections. The XML Gateway is middleware which allows backend interaction between Insight and other XML aware applications.

## Finding Installers and Tools on the CDs

Insight 6.2 is shipped on two or three separate CDs. There is one CD for the general installers, one for the clients and one if you are upgrading Insight. Below is a list of the tools / installers available on each CD:

**Table 1: Distribution CD Contents**

	CD1 – Insight	CD2 – Clients	CD3 – Upgrade
Insight Suite Installer including installers for: User Manager, Collection Manager, Personal Insight Manager, BrowserInsight, XML Gateway, Media Manager, Insight Studio, Tomcat 5.0	X		
Insight Upgrade Installer including upgrade installers for: User Manager, Collection Manager, BrowserInsight, XML Gateway, Media Manager, Tomcat 5.0			X
Insight 6.2	X	X	X
Inscribe 6.2	X	X	X
Insight Studio 6.2	X	X	X
Insight Administrator Tools 6.2	X	X	X
Command Line Indexer	X		X
Background template	X		X
Browser background template	X		X
XML Gateway test application (with source code)	X		X
Log Analyzer	X		X
Insight Launch Manager	X		X
Insight client bundles for Deploy Director			X
Simple Search Servlet for the Insight XML Gateway	X		X
Collection Reporting Tools	X		X
Check Hostname	X		X

**The LUNA Suite** is contained on it's own DVD and is available for download at the Luna Imaging Inc Support website

## **Locations of Commonly Used Components**

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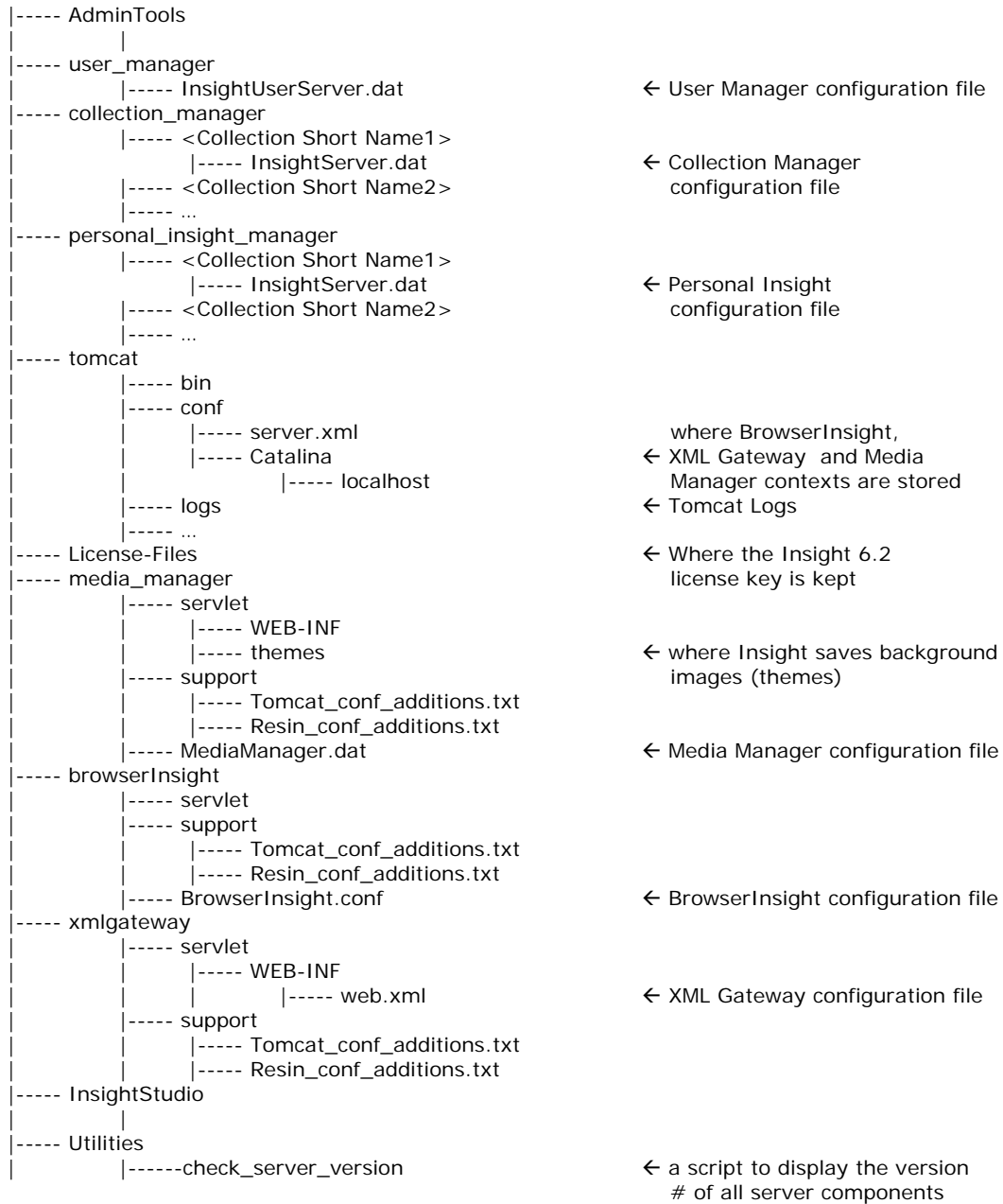
The Suite installer for Insight 6.2 manages where all of the components are installed.

Platform	Location
Windows	C:\program files\LunaImaging\6.x
Solaris / Linux	/home/<username> /LunaImaging/6.x

## Basic structure for the Insight Server Components

This structure may be useful in understanding where to find common components.

**Figure 2: Insight Installation Directory**  
<installation directory>



## Basic Structure of the Media Manager Source File Directory

---

The Media Manager organizes files by size / file-type, collection, and batch. The top level directory is the size / filetype (one size for each JPEG derivative, then SID, Audio, Video, and JP2K). Content is organized in this sub-directory structure to ensure that the Media Manager can manage content from multiple collections as well as multiple Collection or Personal Insight Managers.

**Figure 3: Media Manager Directory Organization**

<media source directory>

```
|----- Size0
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- Images
|----- Size1
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- Images
|----- Size2
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- Images
|----- Size3
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- Images
|----- Size4
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- Images
|----- JP2k
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- Images
|----- AUDIO
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- Audio
|----- VIDEO
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- Video
|----- QTVR
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- QTVR
|----- MISC
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- Files
|----- SOURCE
|         |----- Collection-Triplet
|         |         |----- BatchID
|         |         |----- Images
```

The second piece of the directory structure is the Collection-Triplet, which is the combination of the InstitutionID, CollectionID, and Virtual CollectionID, separated by hyphens. The final directory is the Media Batch, which helps with the organization of

content based on processing logic – Media Batches are created by the end-user and may separate images digitized at one time, or simply imported at one time.

# Installing Insight

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This section will walk you through every step of installing and configuring the Insight server components from scratch. (For information about installing the client applications, see [Repackaging & Advanced Configuration of the Insight Client Applications](#).) By the end of this section, you should have a fully working version of Insight and be able to build collections.

**NOTE:** Please note that there is plenty of useful information throughout this document, so you will most likely want to use it as a reference in the future.

## Installation Process

---

The installation process is broken down into five stages:

1. Create Databases
2. Install Insight
3. Configure & Test Installation
4. Configure components to run as services
5. Run Insight Studio

## Prerequisites

---

Before installing Insight, you should make sure that you have reviewed this entire section and completed the pre-install checklist, prepared your database, and planned for the disk storage requirements for Insight.

## Choosing the Features you Plan to Install

If you have not already, please decide which features you plan to install. By default the installer will install the following:

- Insight User Manager
- Insight Collection Manager
- Tomcat 5
- BrowserInsight
- Insight Media Manager
- Insight Administrator Tools

Optionally, the installer allows you to separately install:

- Insight Studio
- Personal Insight Manager
- Insight XML Gateway

## Suggested Installation Methodology

As the Suite Installer will configure all of the Insight server components as it runs, it is suggested that for ease of configuration in the future you install ALL components, even if you do not plan to implement them right away.

**NOTE:** After Installation you will be required to activate the product by obtaining a license key and copying it into the main License-Files directory.

## Space Requirements

There are three main disk storage requirements for the Insight server components. Storage must be allocated for:

- The installed application
- The database
- The media (Images, Video and Audio).

## Space for Installation

Depending on the specific features installed, the Insight server components will use between 200MB and 500MB.

## Space for Images and Multimedia

Before you install Insight, ensure that you have enough storage set aside for images to support the growth of your collection. Insight uses a set of JPEGs for lower resolution images and a wavelet compressed image format to manage its high-quality images. Wavelet images are compressed with a ratio that varies from 15:1 to 30:1, based on the size and other qualities of the image. To estimate the space necessary for images in a collection, assume that a 20MB TIFF file (containing detail roughly equivalent to a 35mm slide) will take up 1-2MB of space, while a 70MB TIFF file (roughly equivalent to a 4x5 Color Transparency) will take up 5-7MB.

**NOTE:** Multimedia files (Audio, Video, & QTVR) will not be altered during processing and will remain the same size on your server.



## Space for the Database

We suggest that you start by allocating 500MB per Insight collection or Personal Insight database, and 50MB for the Insight User Manager database.

## Pre-Installation Checklist

Below is a checklist for all of the information necessary to perform a complete installation of the server. It is **strongly** suggested that you complete the checklist before beginning your installation.

**NOTE:** Topics discussed in the checklist will be covered throughout this chapter. It may be helpful to print out the checklist and keep it for future reference and ease of completion.

## Obtaining the Hostname

Insight comes with a simple utility that will allow you to obtain the hostname of your server. The utility is located in \utilities\check\_hostname. Please execute checkHostname.cmd (for Windows) or checkHostname.sh (for UNIX/Linux) on the server where you will be installing the Insight server components.

**Table 2: Pre-Installation Checklist**

<b>General Information</b>	
Installation Location:	
Insight Administrator Username:	
Insight Administrator Password:	
<b>NOTE:</b> This username and password will be needed to administer the User Manager, Collection Manager, and Personal Insight Manager. It will also be used in Insight Studio and the Administrator Tools. You may want to Choose a name that reflects this privilege level.	
Institution ID:	
<b>User Manager</b>	
User Manager Address:	
<b>NOTE:</b> This should be a fully qualified Hostname, not an IP	
Database Type:	MSSQL Server 7+ ____ Oracle 8, Oracle 9+ ____ MySQL 4.1 ____
Database Hostname / IP:	
Database Port:	
<i>Common Ports (MSSQL 1433, Oracle: 1521, MySQL 3306)</i>	
Database Username:	
Database Password:	
Database Name / SID Name	
<i>(SID is for oracle)</i>	
Database Service Name (Windows only):	
<b>Collection Manager</b>	
Database Type:	MSSQL Server 7+ ____

	Oracle 8, Oracle 9+ ____ MySQL 4.1 ____
Database Hostname / IP:	
Database Port:	
<i>Common Ports (MSSQL 1433, Oracle: 1521, MySQL 3306)</i>	
Database Username:	
Database Password:	
Database Name / SID Name:	
<i>(SID is for oracle)</i>	
Database Service Name (Windows only):	
<b>Personal Insight Manager</b>	
Database Type:	MSSQL Server 7+ ____ Oracle 8, Oracle 9+ ____ MySQL 4.1 ____
Database Hostname / IP:	
Database Port:	
<i>Common Ports (MSSQL 1433, Oracle: 1521, MySQL 3306)</i>	
Database Username:	
Database Password:	
Database Name / SID Name:	
<i>(SID is for oracle)</i>	
Database Service Name (Windows only):	
<b>Tomcat</b>	
Tomcat Hostname:	
<b>NOTE:</b> This is commonly the same as the User Manager Address	
Tomcat Port	
<b>Media Manager:</b>	
Media Storage Location:	
<b>NOTE:</b> The Hostname information for Collection Manager will be used for registering your license key.	

## Setting up your Database

Please ensure that your database server is installed and is running properly before you continue. During Insight's installation process, the Suite Installer will create the database tables, indexes, and keys necessary to run Insight. Therefore, you must create the databases and tablespaces for Insight's server components before running the installer. Please review the following section for information on creating the Insight Databases.

### Microsoft SQL Server

For Microsoft SQL Server, you will need to create a database for each component of Insight you plan to install. To run the installer, the MSSQLSERVER and SQLSERVERAGENT services must be running. It is also highly recommended that you create a Login in Microsoft SQL Server for Insight and grant the Login the following roles in the Insight Database:

- **public**
- **db\_owner**

**Table 3: Microsoft SQL Server Database Creation Worksheet**

Component	Database Name	Insight User
Insight User Manager		
Insight Collection Manager		
Personal Insight Manager		

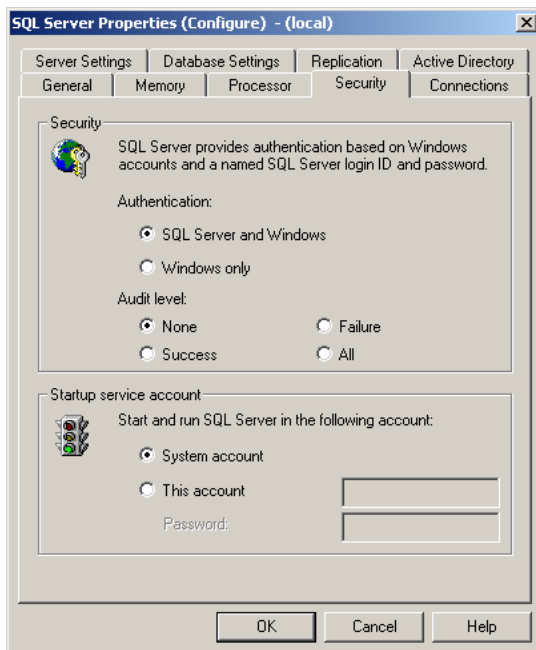
## Enabling SQL Authentication

By default, Microsoft SQL Server ships with “OS based authentication”, i.e. authenticating using Windows-based authentication. Insight, however, **requires SQL Authentication** to be enabled. Prior to enabling SQL Authentication, check with your DBA to ensure that this will not affect other systems.

To enable SQL Authentication on Microsoft SQL Server:

- 1) Launch the Microsoft SQL Server Enterprise Console.
- 2) Locate the entry for your server (if you have more than one).
- 3) Right-click on your server in the tree and choose Properties.
- 4) Select the security settings tab and change the default authentication method from “Windows Only” to “SQL Server and Windows” (supporting both Windows and SQL authentication methods).
- 5) Restart SQL server.

**Figure 4: Enabling SQL Server & Windows Authentication for Microsoft SQL Server**



## Oracle

For Oracle, you will need to create a **tablespace**, a **temporary tablespace** and a **user** for each of the Insight server component you wish to install. You can create the tablespaces in Oracle's "Enterprise Manager Console". If you do not have access or do not know about creating tablespaces, please contact your Oracle DBA.

For the User Manager, the tablespace should be 50MB in size with equal temporary space. For the Collection Manager and Personal Insight Manager, the tablespace and temp tablespace should be 500MB in size to start.

Once you have created the tablespaces, create a user for each tablespace, grant the user default access to the corresponding tablespace, and also grant the user the following role: **Connect**.

**NOTE:** If you need to access your database tables via Oracle's Enterprise Manager, you will need to add the **Select Any Dictionary** system privilege to the user.

**NOTE:** Once you have Insight system up and running and have added some data to the system, it is recommended that you perform analysis to generate statistics on your database and do this periodically as your database grows. This will help to ensure your insight platform is operating in an optimal environment.

**NOTE:** Future upgrade scripts may require the Resource role as well. Optionally, you may choose to grant the user this role to simplify the process in the future.

**Table 4: Oracle Database Creation Worksheet**

Component	Oracle User	Oracle Tablespace	Tablespace Size	Temp Tablespace
Insight User Manager			50MB (suggested)	
Insight Collection Manager			1GB (suggested)	
Personal Insight Manager			1GB (suggested)	

**NOTE:** Be aware of the default character set and collation of your oracle instance. We suggest either ISO8859-1, LATIN-1, or Unicode by default as it will properly support special characters and other content in Insight.

## UNICODE (UTF-8) Support

If you intend to catalog content in other languages than English, you will need to setup Oracle to use the UTF Character Set. Specifically, the Oracle Instance should be setup with the **NLS\_CHARACTERSET** value of "**UTF8**". This will ensure that the database is properly configured and setup.

**NOTE:** Unicode characters take up twice as much space as Non-Unicode characters, hence, you will need to allocate extra space.

## MySQL 4.1

For MySQL 4.1, you will need to create a schema for each Insight server component you wish to install. It is also strongly suggested that you create a user specifically for Insight to use to connect to the database.

**Table 5: MySQL Database Creation Worksheet**

Component	Schema Name	Insight User
Insight User Manager		
Insight Collection Manager		
Personal Insight Manager		

## Backing Up Your Databases

It is good practice to back up your databases on a regular basis. We suggest using the following procedure:

- daily backup of the database is rotated on a 3 day cycle
- once a week, a backup is set aside and saved for a month
- the first backup of every month is saved for a year
- perform specific backups before major operations such as applying patches or major data import / update procedures.



**WARNING:** It is important to run regular backups and to test your backup system.

## Installing on Windows

It is suggested that you run the installer while on console. If you are running the installer through PC Anywhere, VNC, or Terminal Services, the installer may not launch properly.

## Installing on Solaris or Linux

It is suggested that you create a specific user in a Linux or Solaris environment for Insight and run the application as that user. As Insight contains a number of components, all of which interact with each other, this simplifies rights issues as well as provides organization to the installation.

**NOTE:** It is **STRONGLY** recommended that you install and configure Insight as the **SAME USER** that will be running Insight on the server.

## Running the Insight Suite Installer

All Insight 6.2 Server components are installed from a single Suite Installer. Individual components may be included or excluded from the installation process via checkboxes. If you need to install components later, then you can run the Suite

Installer again, choose “Custom” installation and select the specific components you wish to install.

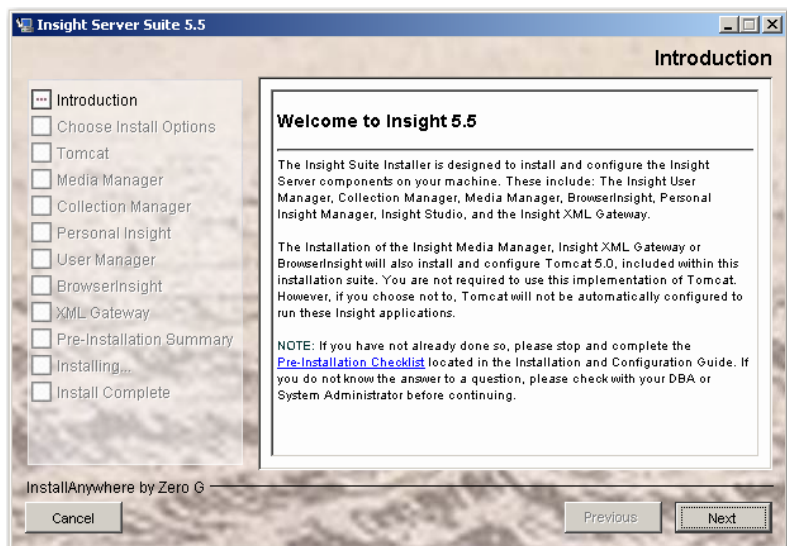
**NOTE:** Plan to spend approximately an hour running the installer. Complete the checklist before running the installer.

## Where to Find the Installer

The Insight Suite Installer can be found in the suite\_install directory of CD1. The installers are platform-specific and separated into directories specific to each platform.

## Running the Installer

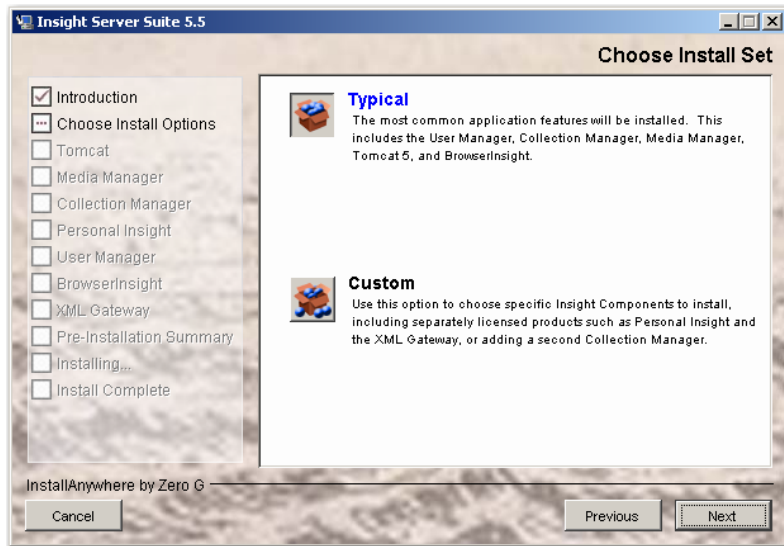
To run the installer, double-click on the installServerSuite executable appropriate to your platform. Please note, the installer is around 100MB, so it may take a few minutes to initially load.



**NOTE:** The Installer is GUI-based and will require an X-Windows environment on any UNIX based system.

## Selecting an Installation Type

The Insight Suite Installer allows you to perform either a “Typical” or a “Custom” installation.

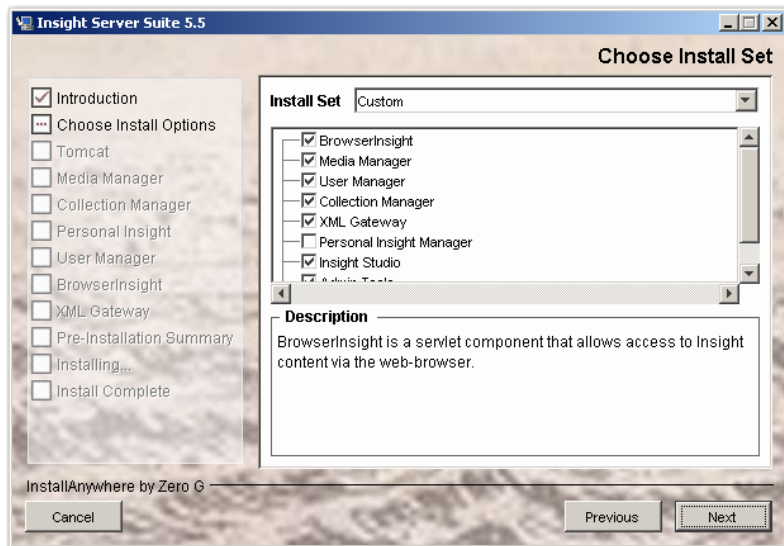


## Performing a Typical Installation

“Typical” installation includes User Manager, Collection Manager, Media Manager, Insight Studio, an optimized version of Tomcat, and BrowserInsight.

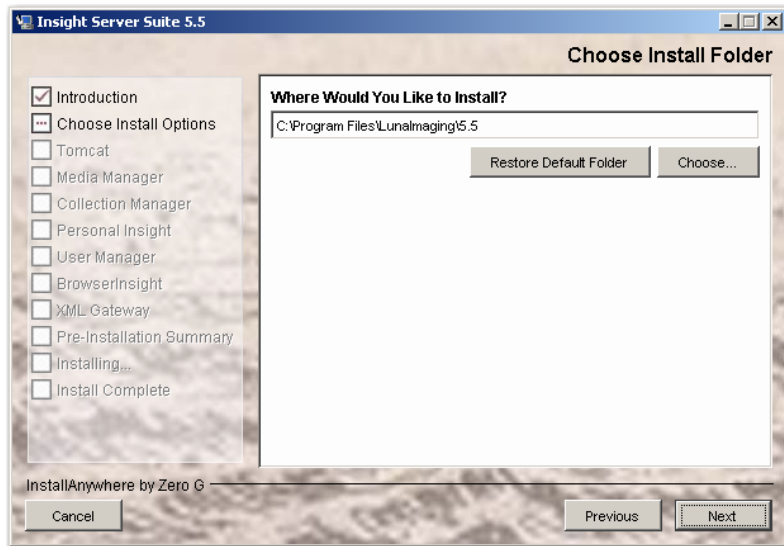
## Performing a Custom Installation

“Custom” installation allows you to choose a subset of the above components, and allows selection of the XML Gateway and Personal Insight products.



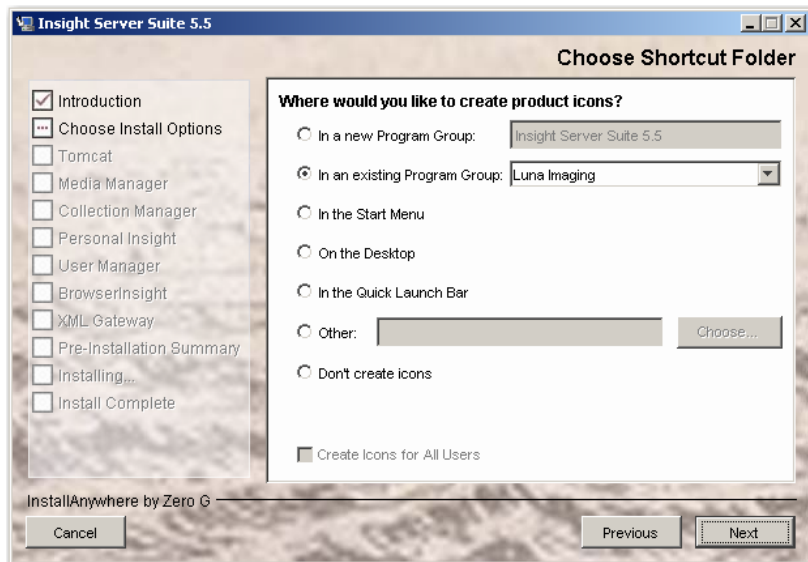
## Choosing an Installation Location

The Installation of the Insight server components can take up to 300MB, please plan accordingly when installing the server components.



## Creating a Shortcut Folder

The installer can create a series of links to the server components and documentation on install. Please choose the location you would like to create these in. On Windows, the default is a "Luna Imaging" program group.

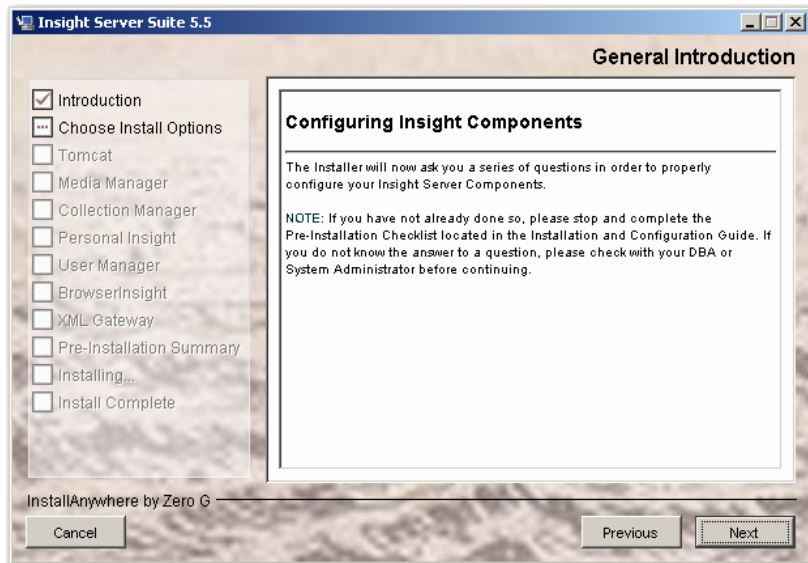


## Configuring the Server Components

The installer will now walk you through configuring the insight server components. Before proceeding, you should have:

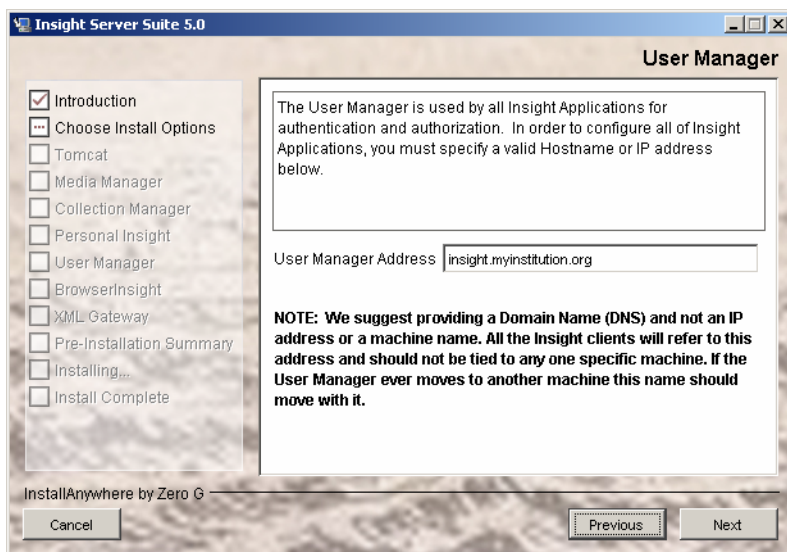
- Created the databases for the insight server components
- Completed the installation checklist





## Selecting a User Manager Address

The Insight User Manager provides authentication and authorization services for all of the Insight Components. In order to run properly, many of these components, including BrowserInsight and the Java Clients need to communicate with the Insight User Manager. The User Manager Address, therefore, should be a **Fully-Qualified Domain Name** address that anyone can access from anywhere. The User Manager Address identified here will be used throughout the installer to configure the rest of your components.



**NOTE:** Luna suggests you choose a fully-qualified DNS resolvable Hostname as opposed to an IP Address to provide more flexibility in the installation and management.

## Specifying an Administrative Username and Password for Insight

Insight requires you to specify an administrative username and password. This username and password will be used for authentication within the Insight Administrator Tools and Insight Studio. Users with this username and password have access to tools that can create / delete collections and make major modifications to Insight's configuration, so be careful who it is shared with.

The screenshot shows the 'Administrative Username and Password' window in the Insight Server Suite 5.0 installer. On the left is a list of installation steps: Introduction (checked), Choose Install Options (checked), Tomcat, Media Manager, Collection Manager, Personal Insight, User Manager, BrowserInsight, XML Gateway, Pre-Installation Summary, Installing..., and Install Complete. The main area contains instructions: 'Please specify a username and password for the Insight Administrator Account. This username will be used to manage the User Manager, Collection Manager, and Personal Insight Manager.' Below this are two text input fields: 'Insight Administrator Username' with the value 'admin' and 'Password' with masked characters '\*\*\*\*\*'. A section titled 'Please confirm your password' follows, with another 'Password' field also containing '\*\*\*\*\*'. At the bottom are 'Cancel', 'Previous', and 'Next' buttons. The footer text reads 'InstallAnywhere by Zero G'.

**NOTE:** This password is not encrypted. Do not use your network or system administrator password.

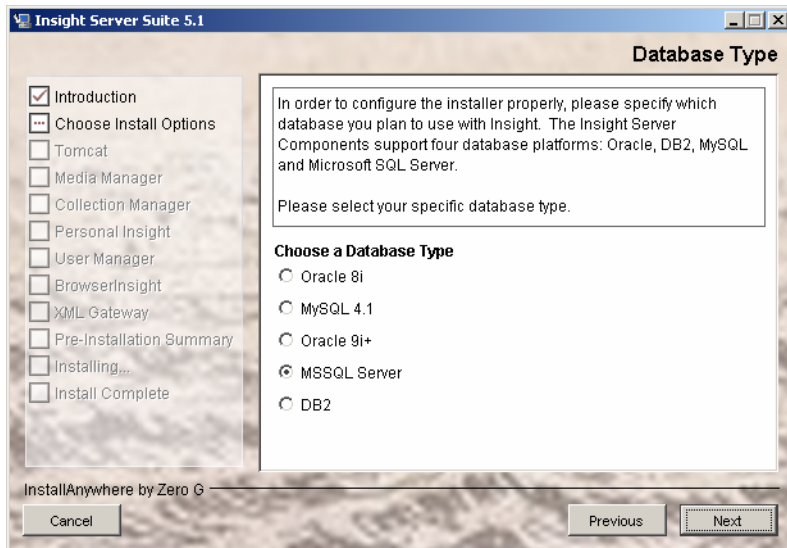
## Specifying an Institution ID

The Institution ID is used in the User Manager to help differentiate shared collections. Specify a value that would be unique to your institution. This is commonly your institution's name or an abbreviation (up to 8 characters).

The screenshot shows the 'Institution ID' window in the Insight Server Suite 5.0 installer. The left sidebar is identical to the previous window, with 'Introduction' and 'Choose Install Options' checked. The main area contains instructions: 'Please enter an Institution ID/Name. This will be used to help identify your Collection & Personal Insight Managers.' Below this is a text input field labeled 'Institution ID' containing the value 'MYINSTITUTION'. At the bottom are 'Cancel', 'Previous', and 'Next' buttons. The footer text reads 'InstallAnywhere by Zero G'.

## Choosing a Database Type

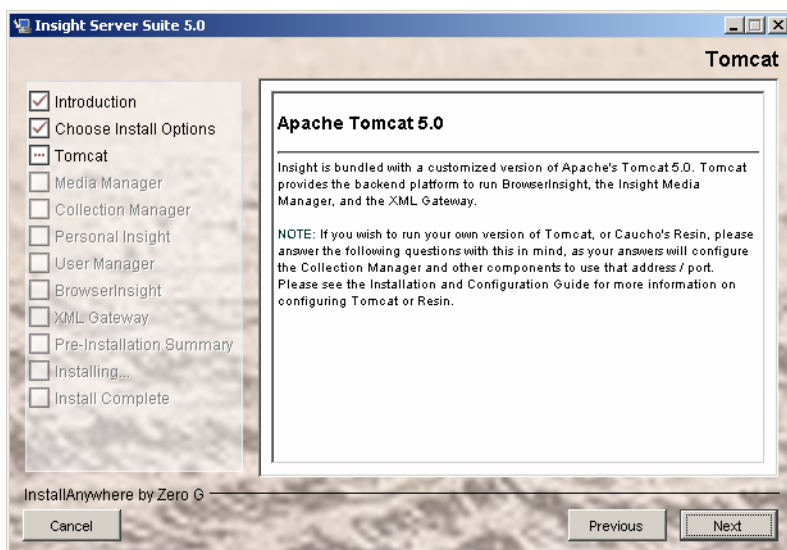
The installer is designed to connect to your database server, create database tables, fields and indexes for your Collection Manager, User Manager, and Personal Insight Manager. Please choose the database type you wish to use. The information you identify here will be used to configure Insight.



**NOTE:** If you have not yet created the databases for the Insight server components you plan to install, please review “Setting up your Database on page 22” for more information.

## Configuring Tomcat 5.0

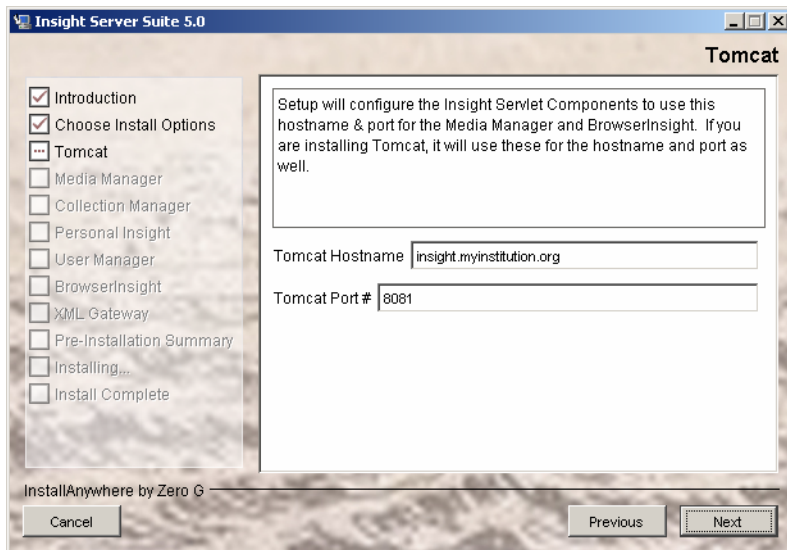
Insight is bundled with a customized version of Apache’s Tomcat 5. This version of Tomcat has been configured with most of the default servlets disabled and a customized set of configuration files.



If you would like to use your own version of Tomcat (or Caucho's Resin), please enter the HOSTNAME and PORT for your version of Tomcat or Resin so that the installer can configure all Insight Components with this information. When you have completed your installation, please see the "Using a Standalone Application Server with the Insight Servlet Components" document for more information.

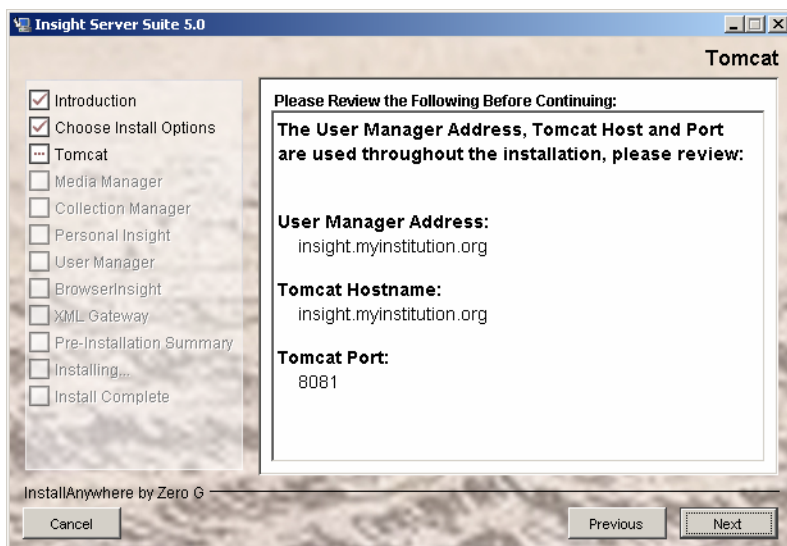
## Choosing a Hostname and Port for Tomcat

To properly configure Tomcat, you must specify the port you wish Tomcat to run on. The default is port 8081 – but if you are currently running Tomcat or another application on port 8081 you will need to choose another port to avoid a conflict.



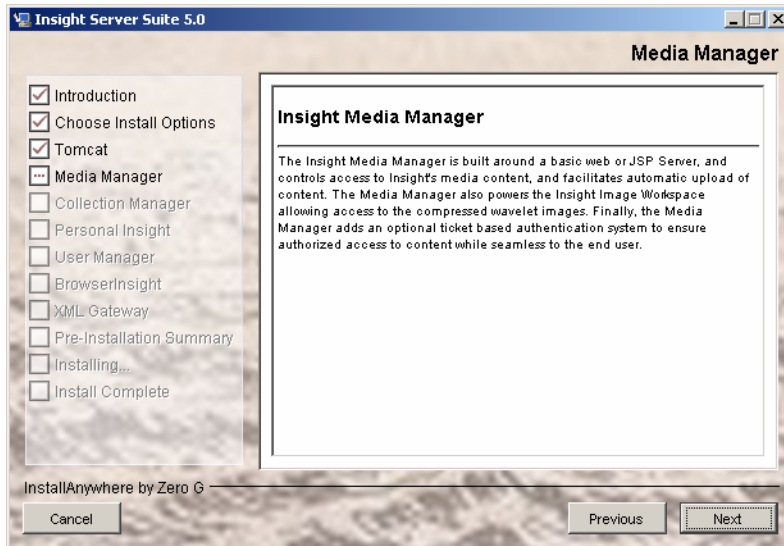
## Review your Tomcat & User Manager Settings

Please review your Tomcat and User Manager hostnames and ports. This information is populated throughout all of Insight's configuration files.



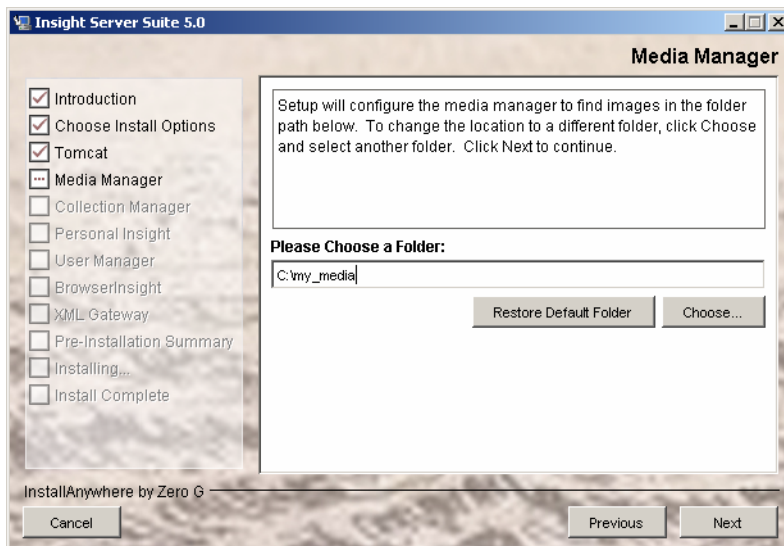
## Configuring the Media Manager

The Insight Media Manager provides access to all of Insight's media and runs as a servlet within Tomcat. To configure the Media Manager, you must specify the location where you wish to store all of your media.



## Specifying a Media Directory

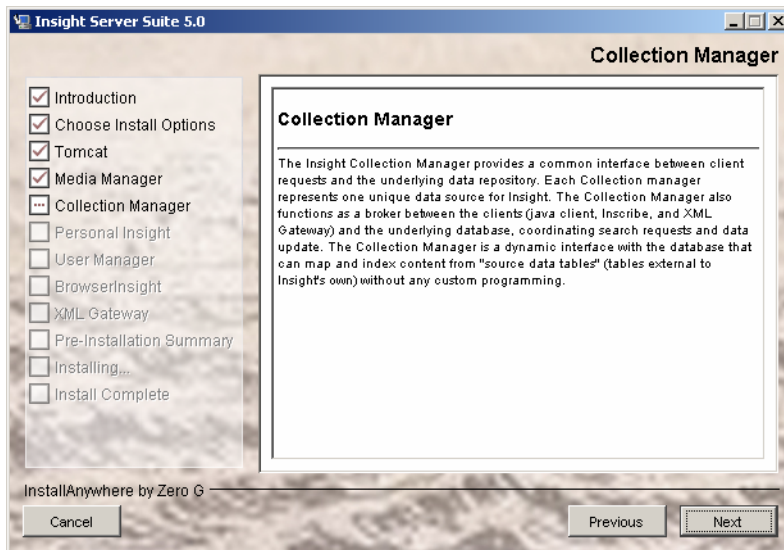
Specify a directory for media content. The Media Manager will place all processed media files from Personal Insight and Insight Studio in this directory.



## Configuring the Collection or Personal Insight Manager

To configure the Collection Manager or Personal Insight Manager, you must first specify the appropriate information so that the installer can connect to the database.

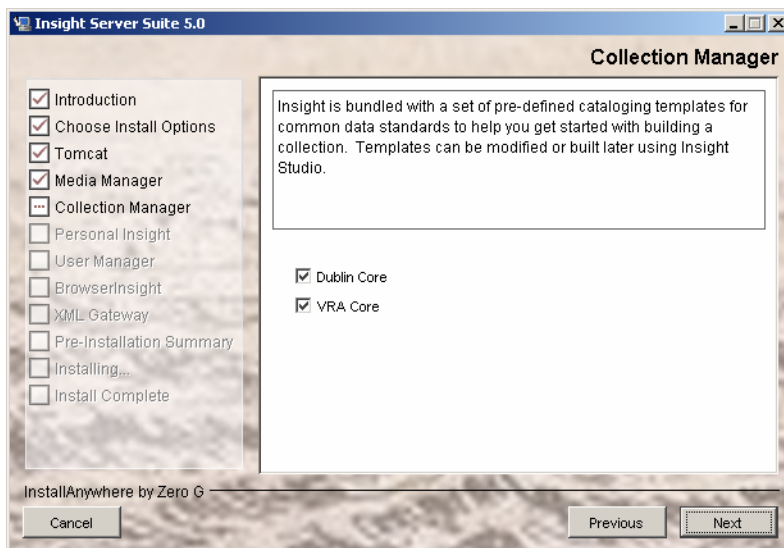
This information will be saved in the Insight Collection Manager and/or Personal Insight Manager's configuration file (InsightServer.dat).



**NOTE:** Each Collection Manager or Personal Insight Manager has its own InsightServer.dat file.

## Choosing Catalog Template(s)

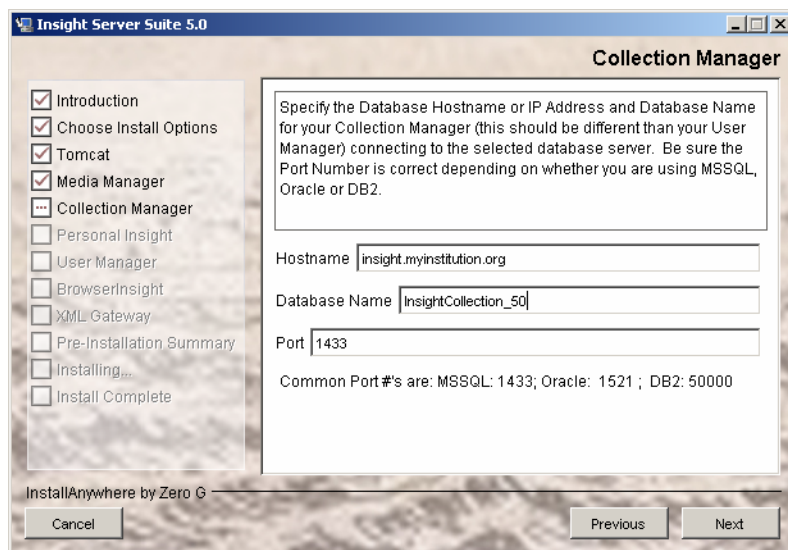
The installer can optionally install a set of catalog templates based on the VRA Core v3 and Dublin Core Data Models.



## Database Information

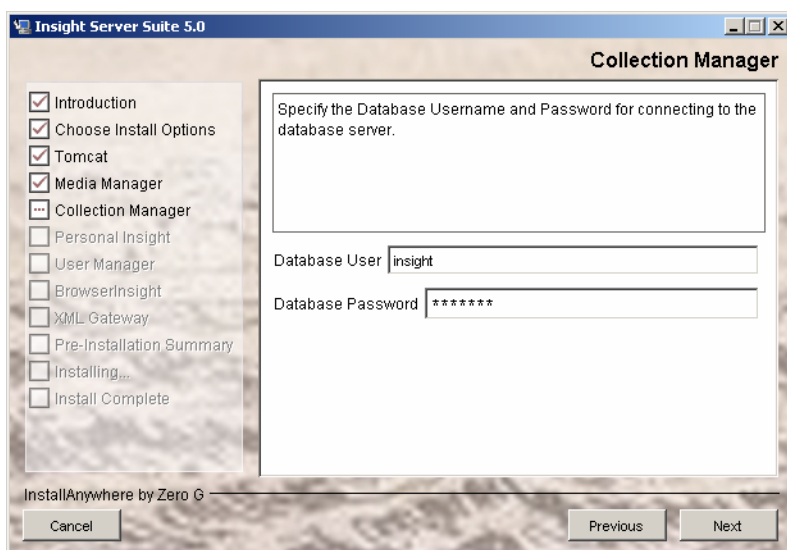
Provide the information necessary to connect to your database, including the hostname, database name (SID Name if you're using Oracle), and database port. The installer will offer default values based on information provided earlier. Review the defaults (and change them as needed).





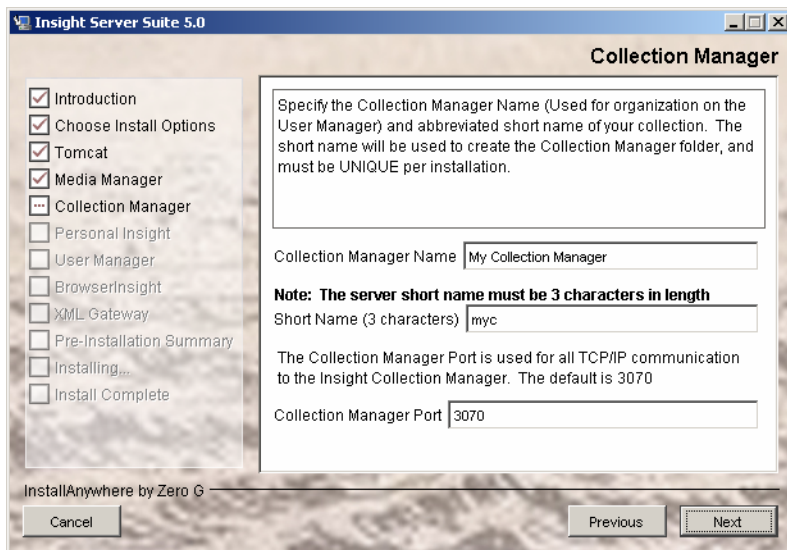
## Database Username and Password

Please specify the username and password for your database. This is the username and password that Insight should use to connect to the database.



## Name your Server and Choose a Port

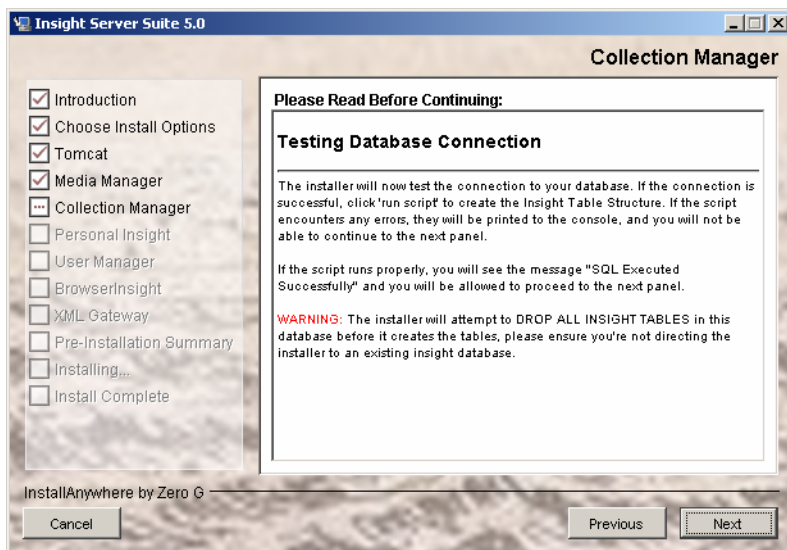
Please provide a name and short name for your Collection Manager. The name will be used to identify the Collection Manager in the User Manager and will be visible to end-users. The short name is used internally to identify directories related to this Collection Manager. Choose a port for your Collection Manager or Personal Insight. The Default port is **3070** for a Collection Manager and **3080** for Personal Insight. However, if you have more than one Collection Manager, you should increment the port on the new Collection Manager so that it does not match any other.



**NOTE:** The server short name is used to create the folder for the Collection Manager.

## Testing the Database Connection

The installer will now test the database connection. If it can connect to the database, it will check for an existing installation of Insight.

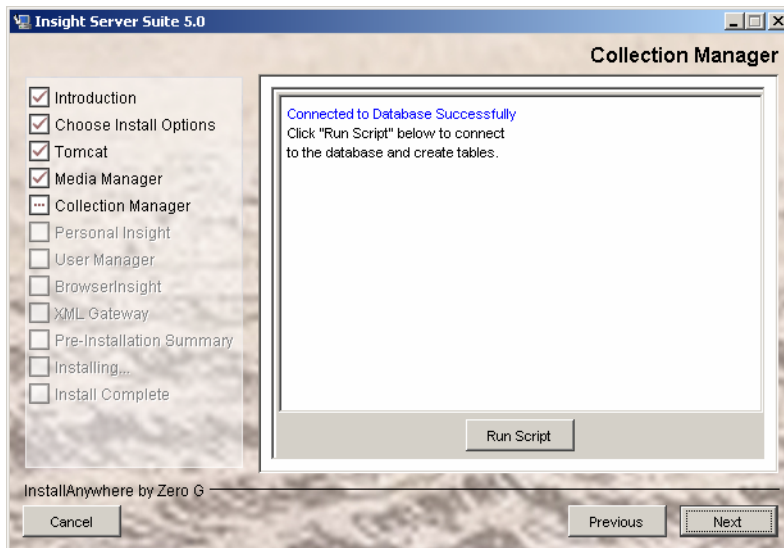


**WARNING:** the installer will **DROP ALL INSIGHT TABLES** once it has connected, so be sure that you are not installing over an existing version of Insight. (The installer will warn you again before it actually drops any tables.)

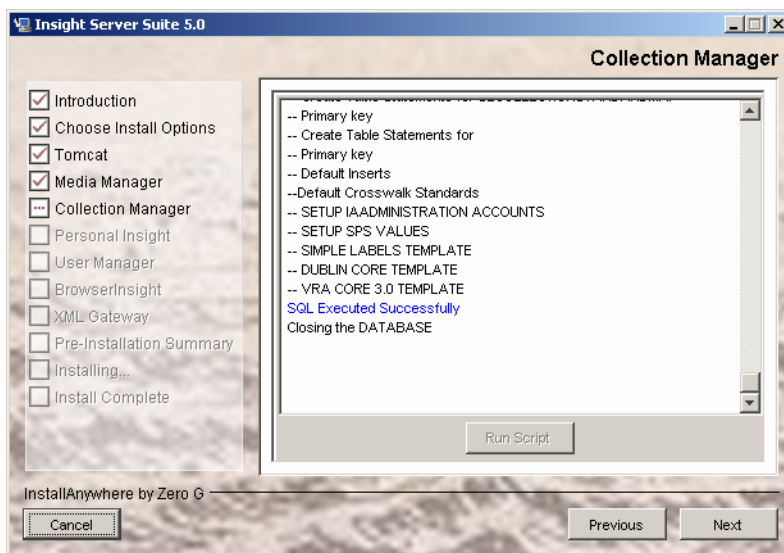


## Creating the Insight Collection Manager Database

Once the installer has tested the connection, it will present you with the database creation script window. Click "Run Script" to create the Insight tables and indexes.



**NOTE:** The installer will not let you continue until it has successfully created the database tables.



Once the installer has run, it will either print "SQL Executed Successfully" or print error messages in **RED**. Please review error messages before continuing. Common reasons for errors include:

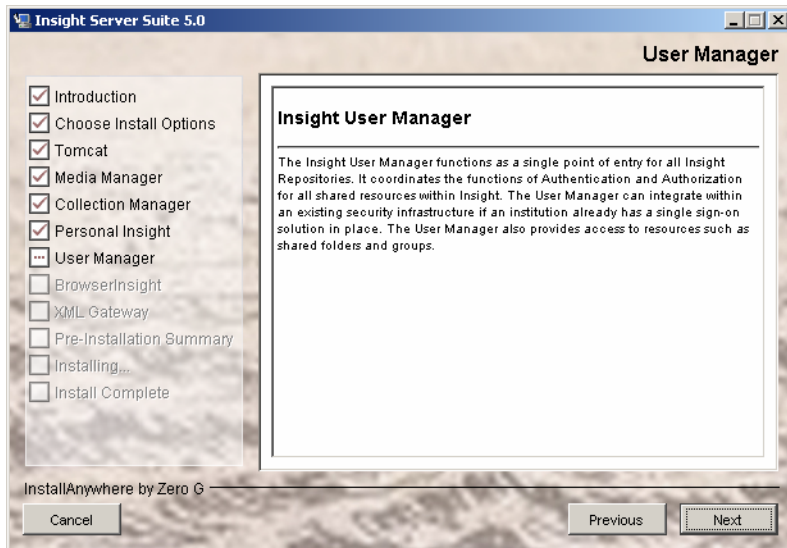
- there is not enough space in the database
- the tablespace
- the user does not have rights to create tables, indexes and keys
- there are not enough cursors available in the Database (Oracle)

- SQL Authentication is not enabled (MSSQL). You may also see “Not Associated with a Trusted SQL Server connection” (might simply mean you need to restart SQL server).

**NOTE:** If you would like to maintain a log of the installer’s database actions, or need to send an error to LUNA, you can copy the text from the installer log.

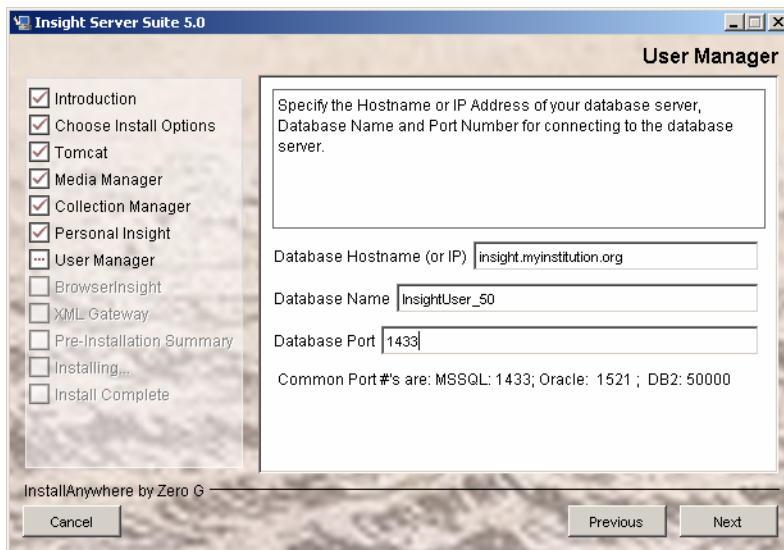
## Configuring the User Manager

To configure the User Manager, you must first specify the appropriate information so that the installer can connect to the database. This information will be saved in the Insight User Manager’s configuration files (InsightUserServer.dat).



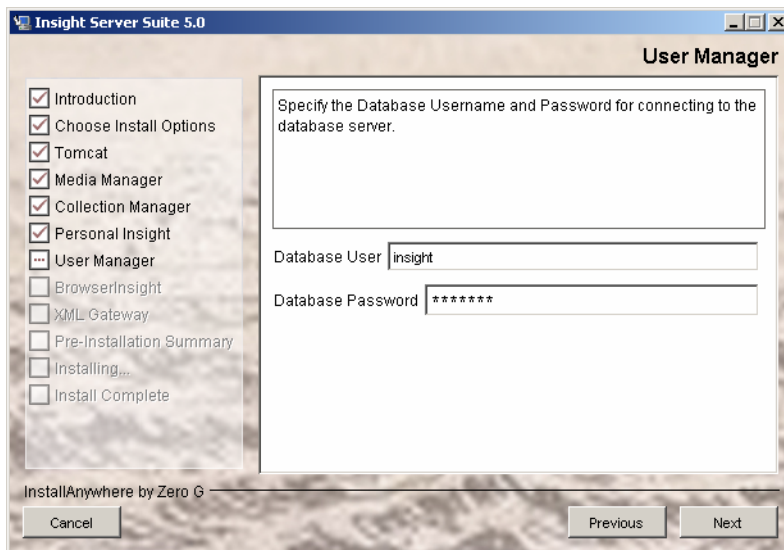
## Database Information

Provide the information necessary to connect to your database, including the hostname, database name (SID Name if you’re using Oracle), and database port. The installer will offer default values based on information provided earlier. Review the defaults (and change them as needed).



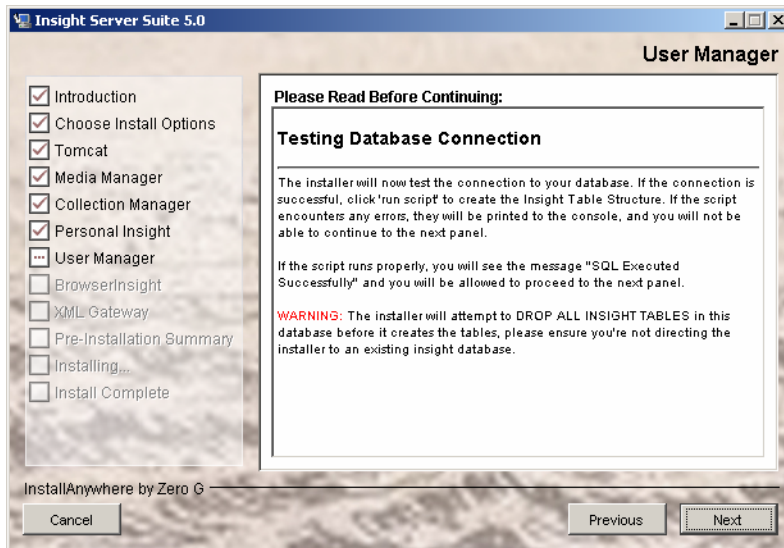
## Database Username and Password

Please specify the username and password for your database. This is the username and password that Insight should use to connect to the database.



## Testing the Database Connection

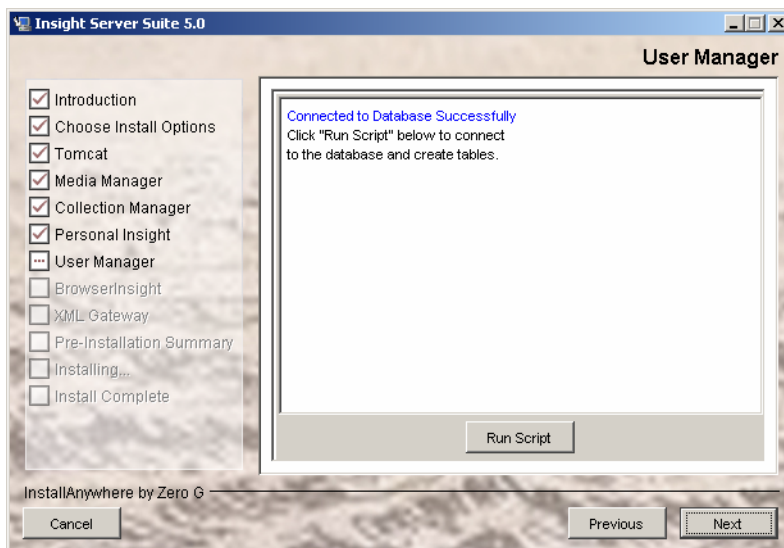
The installer will now test the database connection. If it can connect to the database, it will check for an existing installation of Insight.



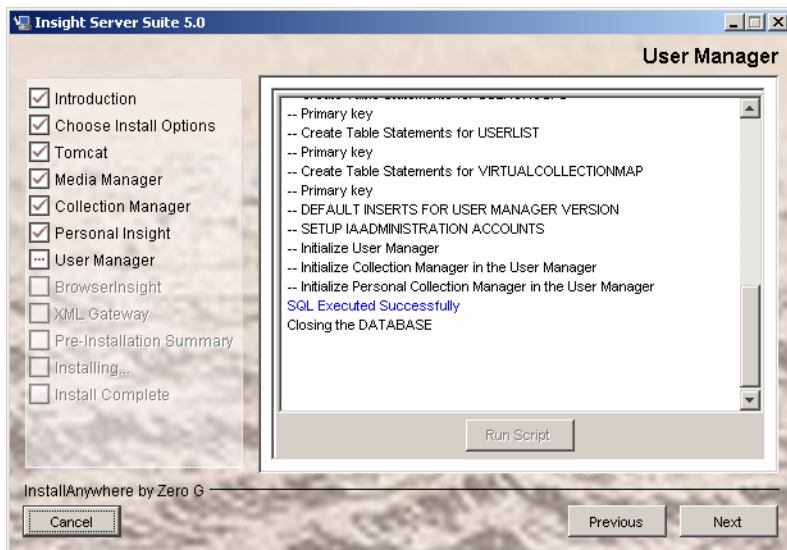
**WARNING:** the installer will **DROP ALL INSIGHT TABLES** once it has connected, so be sure that you are not installing over an existing version of Insight. (The installer will warn you again before it actually drops any tables.)

## Creating the Insight User Manager Database

Once the installer has tested the connection, it will present you with the database creation script window. Click "Run Script" to create the insight tables and indexes.



**NOTE:** The installer will not let you continue until it has successfully created the database tables.

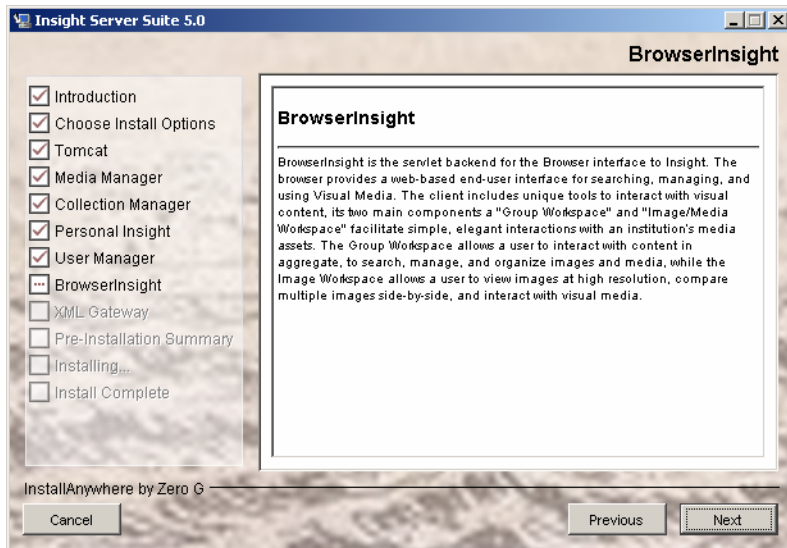


Once the installer has run, it will either print “SQL Executed Successfully” or print error messages in **RED**. Please review error messages before continuing. Common reasons for errors include:

- there is not enough space in the database
- the tablespace
- the user does not have rights to create tables, indexes and keys
- there are not enough cursors available in the Database (Oracle)
- SQL Authentication is not enabled (MSSQL). You may also see “Not Associated with a Trusted SQL Server connection”

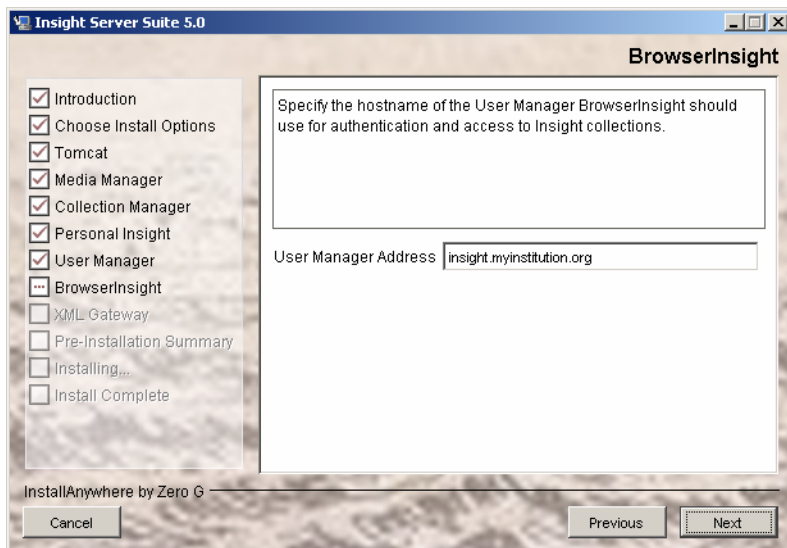
## Configuring BrowserInsight

BrowserInsight is the web interface for Insight and runs as a servlet within Tomcat. To configure BrowserInsight, you must specify the User Manager it should use for authenticating users. By default, this will be set to the address specified when you installed earlier.



## User Manager Address

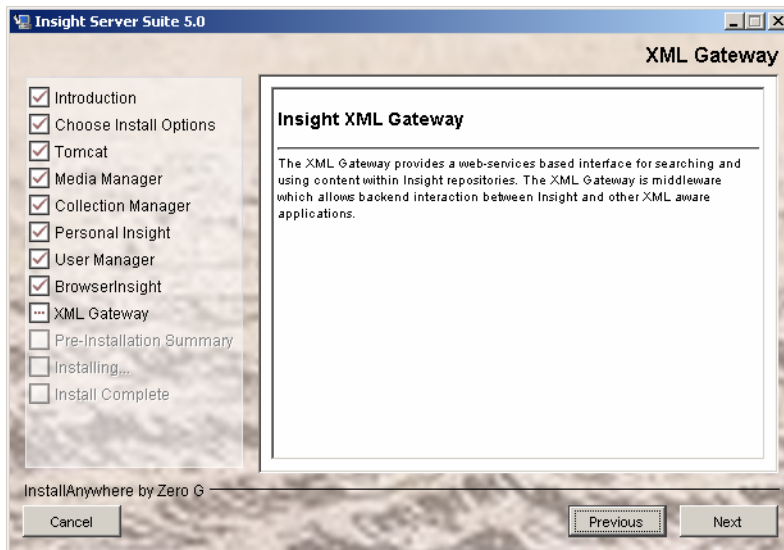
Please enter your User Manager Address.



## Configuring the XML Gateway

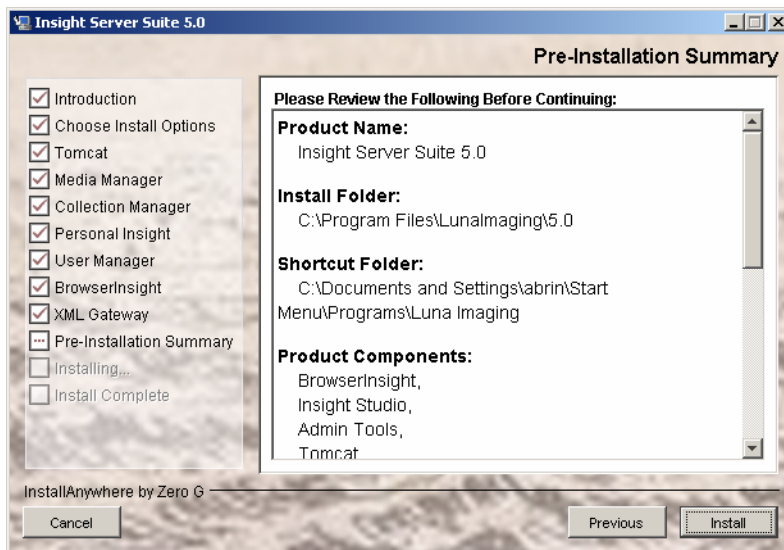
The XML Gateway provides a method for accessing Insight content from any XML-aware application and runs as a servlet within Tomcat. Once the XML Gateway has been installed, you will need to configure with information about how to connect to your User Manager. For more information on configuring the XML Gateway, please see

Configuring the XML Gateway on page 237.



## Final Review

Before continuing, please review the installation choices one last time.



## Installing Files

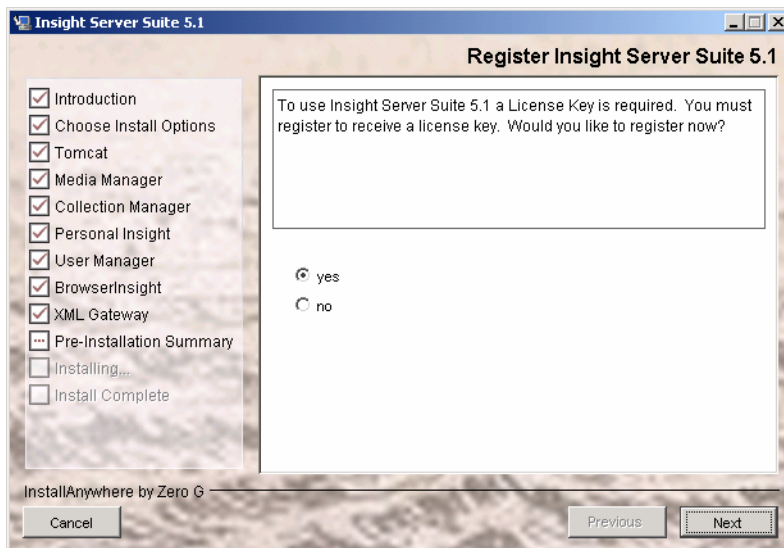
At this point, the Insight Database(s) have been created and configured, but no files have been installed. Press "Install" to install and configure the server components.





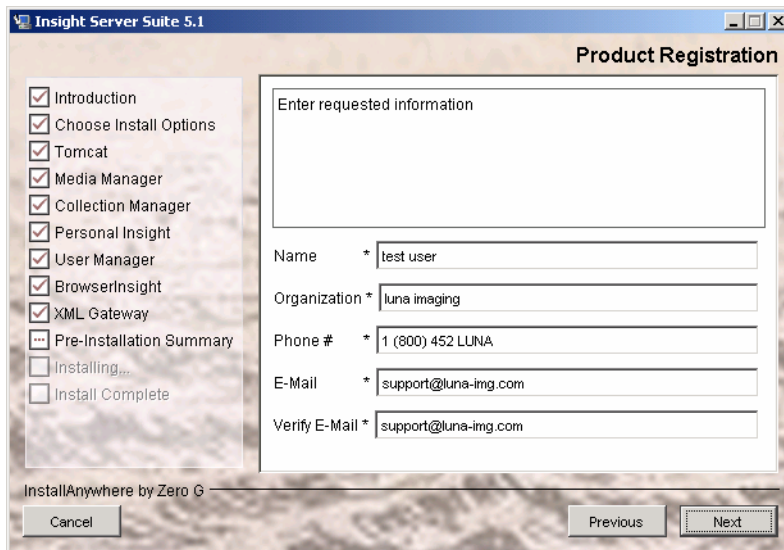
## Registering Insight and Requesting Your License Key

Insight 6.2 integrates the licensing and registration of the server products into the installer.





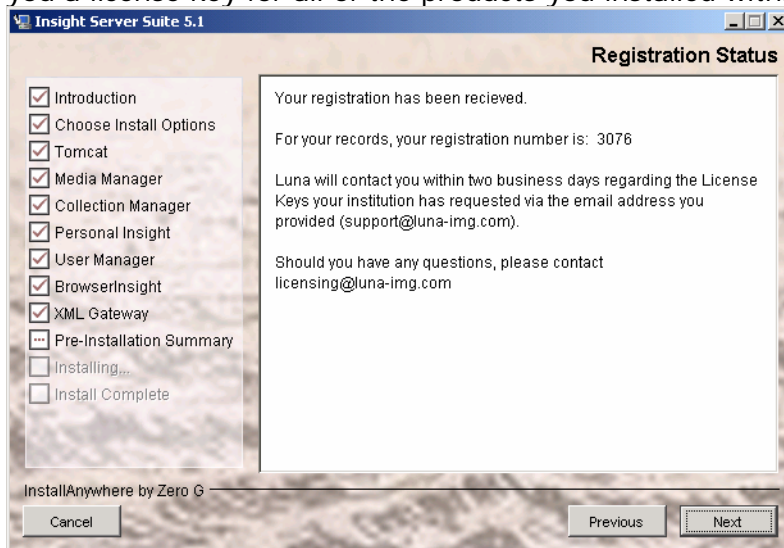
## Complete the Registration Form



The 'Product Registration' window for Insight Server Suite 5.1 features a left-hand sidebar with a list of components and their installation status. The components listed are: Introduction (checked), Choose Install Options (checked), Tomcat (checked), Media Manager (checked), Collection Manager (checked), Personal Insight (checked), User Manager (checked), BrowserInsight (checked), XML Gateway (checked), Pre-Installation Summary (unchecked), Installing... (unchecked), and Install Complete (unchecked). The main area is titled 'Enter requested information' and contains five text input fields: 'Name' (filled with 'test user'), 'Organization' (filled with 'luna imaging'), 'Phone #' (filled with '1 (800) 452 LUNA'), 'E-Mail' (filled with 'support@luna-img.com'), and 'Verify E-Mail' (filled with 'support@luna-img.com'). At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.

## Registration Status

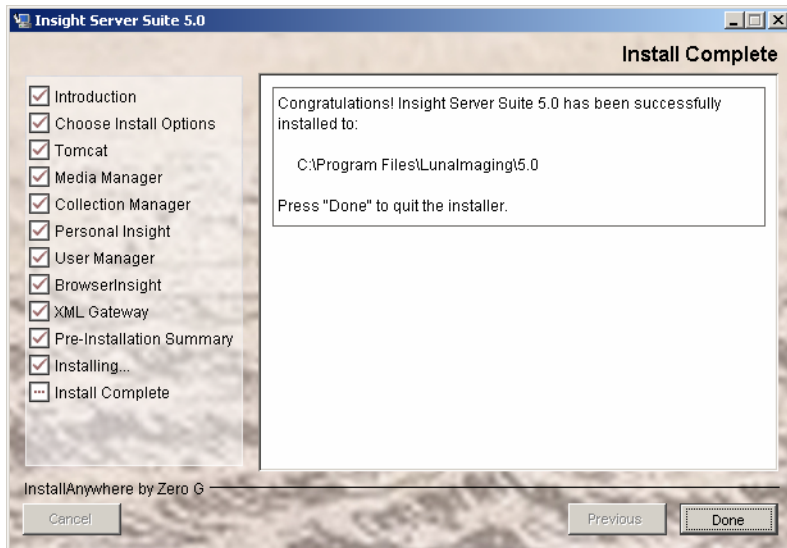
Once complete, the installer will present you with a registration ID. Luna will email you a license key for all of the products you installed within a short period of time.



The 'Registration Status' window for Insight Server Suite 5.1 displays the registration details. The left sidebar is identical to the previous window. The main area contains the following text: 'Your registration has been recieved.', 'For your records, your registration number is: 3076', 'Luna will contact you within two business days regarding the License Keys your institution has requested via the email address you provided (support@luna-img.com).', and 'Should you have any questions, please contact licensing@luna-img.com'. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons.

## Completing the Install

After the installer has finished, each of the installed server components should be started in console mode to ensure that they are working properly. Once you have logged-in successfully and tested the configuration, you will complete installation by configuring each component to run as a service.



## Licensing

If you did not complete registration during the installation and would like to register online, you can access the form at the following URL.

<http://www.lunaimaging.com/support/register/55.html>

Once you have completed the form with your contact information, Luna will contact you with a license key for your product. If you have any questions, please contact <mailto:licensing@luna-img.com> or call (800) 452-LUNA.

## Installation Errors

If your installer has an error during the install process you will receive the following panel indicating an error has occurred. Press the Done button, and then go to the installation directory to review the `Insight_Server_Suite_6.2_InstallLog.log`. This log will indicate where a failure may have occurred. If you are unsure about what the error reported, please forward the report to Luna Imaging's Support department: <mailto:LunaSupport@lunaimaging.com>.

## Next Steps for a New Installation

- 1) Testing the server components and connecting to the Collection and User Managers for the first time with Insight Studio (see page 204).
- 2) Configuring the server components to run as services under Windows and Linux (please see page 222).
- 3) Packaging and Distributing the Java Client (please see page 220).
- 4) Building your first collection (please see the Insight Administrative Guide)

## **Next Steps when adding a new Collection or Personal Insight Manager**

- 1) Testing the server components and connecting to the Collection and User Managers for the first time with Insight Studio (please see page 204).
- 2) Adding a reference to a new Collection Manager or Personal Insight Manager in your User Manager (please see page 191).
- 3) Configuring the server components to run as services under Windows and Linux (please see page 222).
- 4) Packaging and Distributing the Java Client (please see page 220).
- 5) Building your first collection (please see the Insight Administrator Guide).

# Installing LUNA

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## Introduction

LUNA is an additive component to Insight. You will need to have a working Insight installation and collection(s) to make full use of LUNA.

LUNA can be installed into any of the supported Insight configurations with the exception of Oracle 8. Add the necessary database and ensure you have a minimum of 512MB of free memory, or the recommended 1500MB of free memory, on your server.

There are two major components to LUNA, the LUNA Publisher and LUNA. Each item requires a database. Follow the same guidelines described in the Insight installation to prepare these databases. Both databases will only store user generated information and will not store contents of the collections. This means the storage requirements for these databases are fairly small. 100MB should be plenty of space.



Create two databases. One for LUNA and one for the LUNA Publisher

## Running the Installer

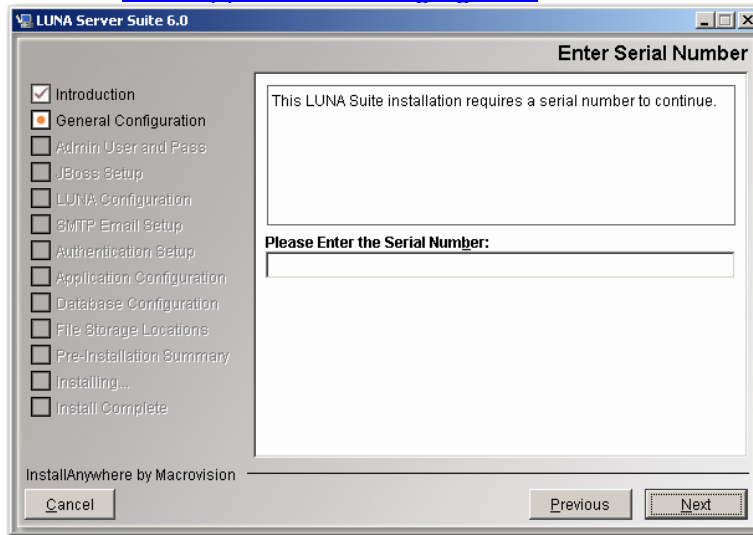
The LUNA installer, like the Insight installer, requires a GUI. If you are installing on Linux or Solaris, you will need X Windows to run the installer or other GUI interface.

Start the LUNA installer on your system and follow the prompts described in the following section.

## Serial Number

The install requires a Serial Number to continue the installation process.

As a licensed institution, you should have been issued one. If not, contact our support department to obtain a valid licensed Serial Number. [lunasupport@lunaimaging.com](mailto:lunasupport@lunaimaging.com)



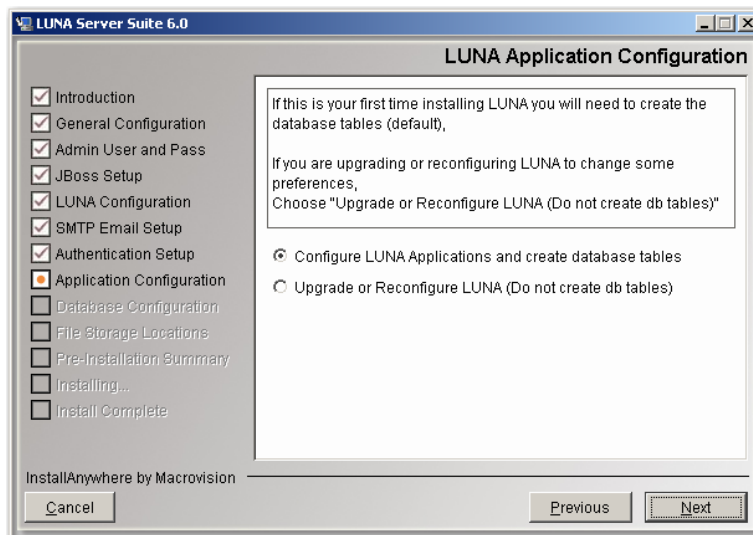
## LUNA Application Configuration

If this is the first time you install LUNA, then you must choose the first option "Configure LUNA Applications and create database tables".

If this is a subsequent installation and you just want to **upgrade** or reconfigure the LUNA application without deleting any user generated information, then choose "Upgrade or Reconfigure LUNA (Do not create db tables)".

**NOTE: If you are upgrading, Stop Jboss before running the installer**

LUNA and the LUNA Publisher are deployed using Java [WAR](#) files. This option will just configure the WAR file and deploy it.



### For Upgrade or Reconfigure Only

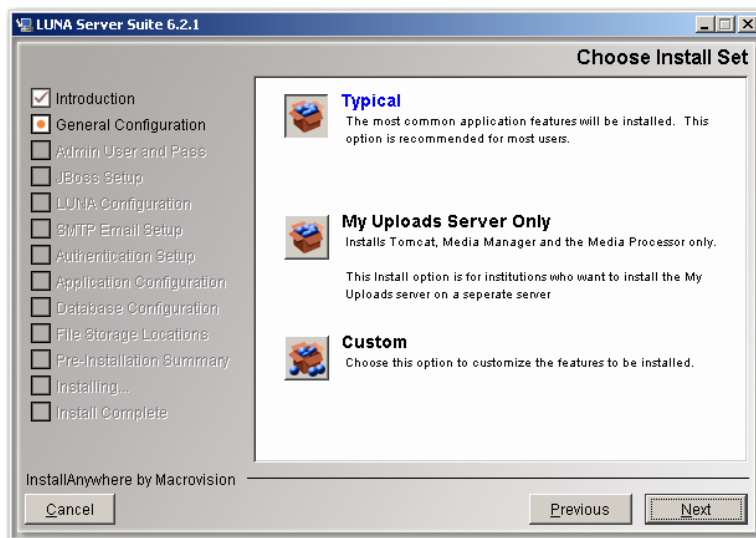
Choosing install sets for upgrade

If you have modified your jboss version for any reason, you may need to apply those changes again once the install is complete.

## Choose Install Set

For the Initial installation, you will generally choose Typical. This will include all system components.

- LUNA
- LUNA Publisher
- JBoss
- Tomcat (New in 6.2.1)
- Media Manager & Media Processor
- Administrator Tools



## My Uploads Server Only

As of version 6.2.1+, LUNA supports uploading of end user's images and content. This feature requires a Media Manager and the Media Processor components.

Since these components place image processing on the server, you may want to separate this activity to another machine depending on the level of use expected.

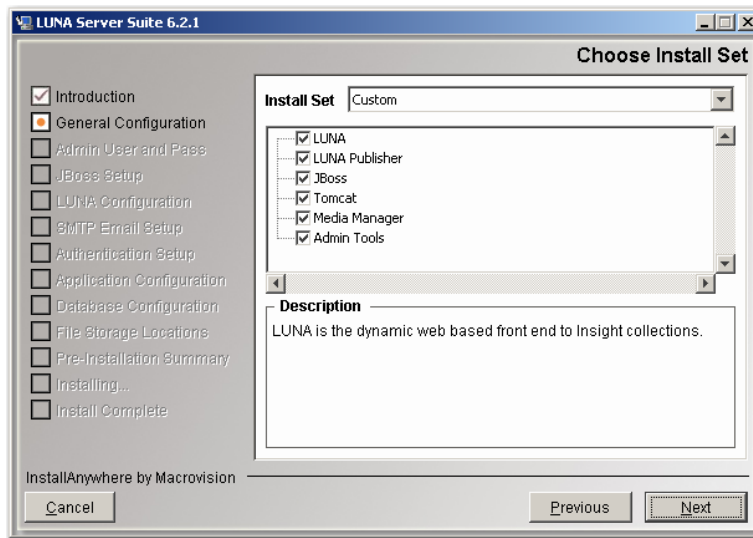
If you choose to install the My Uploads Server independently, then you should install this component first. During the install of the LUNA component, you will be asked the server name and port of your My Uploads server.

This will install a Media Manager, Media Processor and Tomcat.

## Custom Install

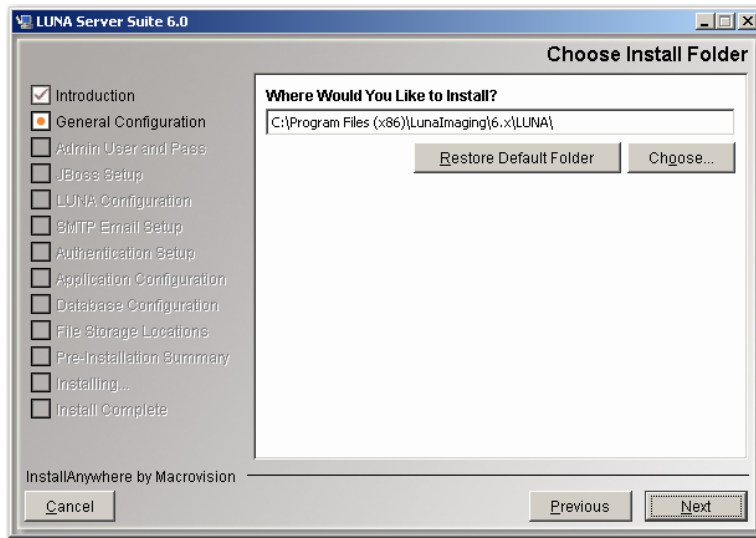
For subsequent installations, you may wish to choose to install a specific component. You can choose to install any of the following system components.

- LUNA
- LUNA Publisher
- JBoss
- Tomcat (New in 6.2.1)
- Media Manager & Media Processor
- Administrator Tools



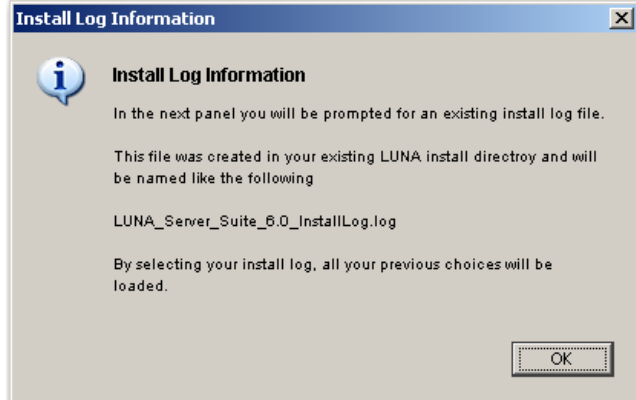
## Install Location

This will be the base of all the LUNA components selected.

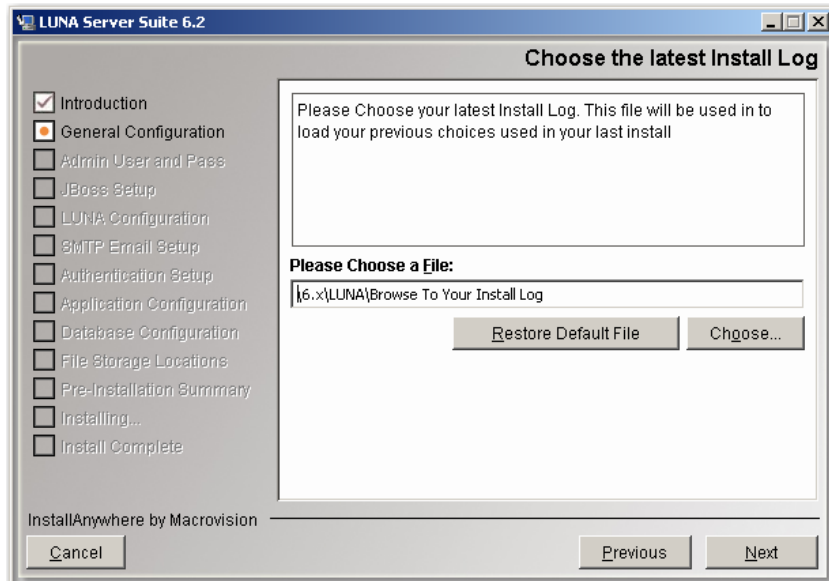




## For Upgrade or Reconfigure Only

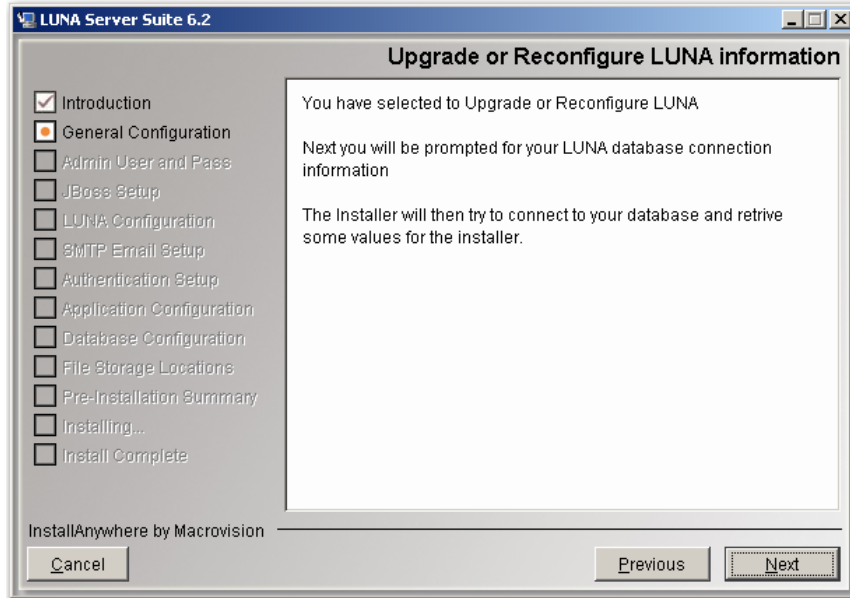


Since you are upgrading, your previous install log can be used to provide the installer with the same choices that you made the last time you installed.

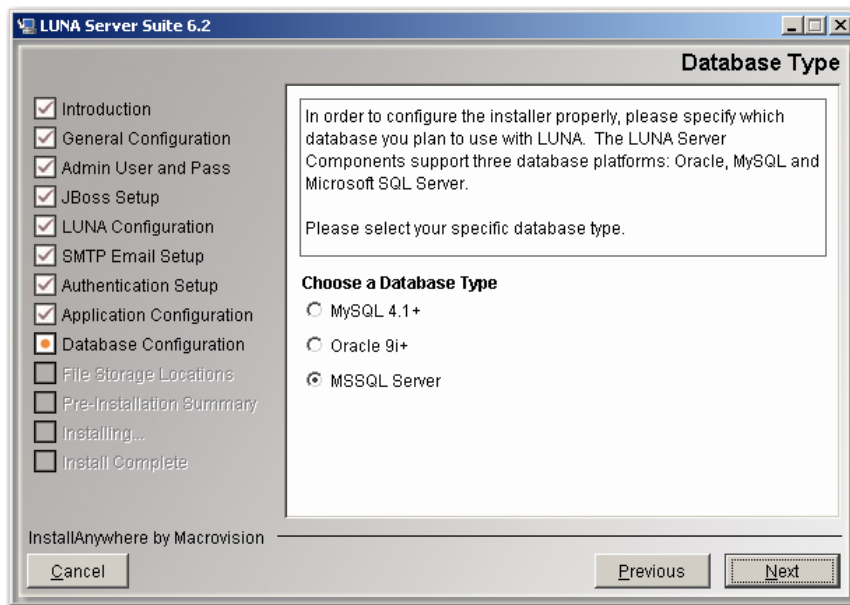


Choose your Install log. This should be located in the root directory of where you installed LUNA. The name should be something like LUNA\_Server\_Suite\_6.0\_installLog.log.

## For Upgrade or Reconfigure Only



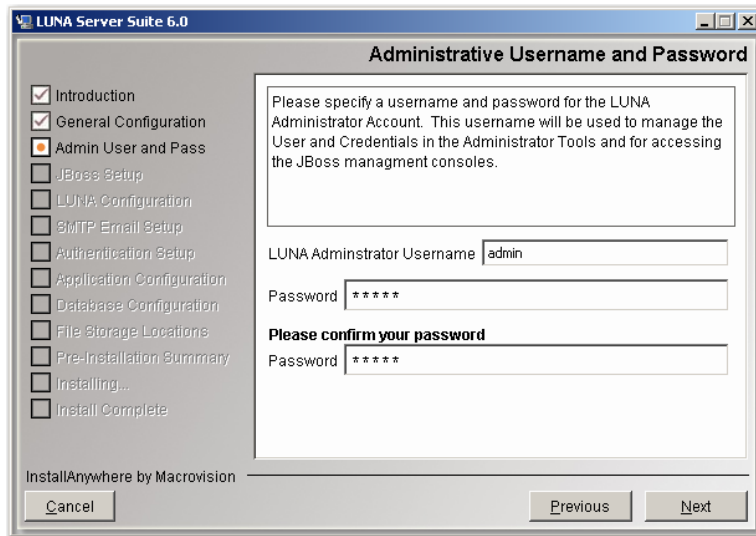
Since you are upgrading, you will now be asked how to connect to your database. Once connected, the installer will read some of your Application Configuration table to assist you in the rest of the upgrade. See [Choosing a Database Type](#) for more information on making choices for this section.



## Specifying an Administrative Username and Password for LUNA

LUNA requires you to specify an administrative username and password. This username and password will be used for authentication within the Administrator Tools and for accessing the JBoss management consoles. Users with this username and password have access to tools that can manage LUNA collection access and Credentials and modify LUNA's configuration, so be careful who it is shared with.

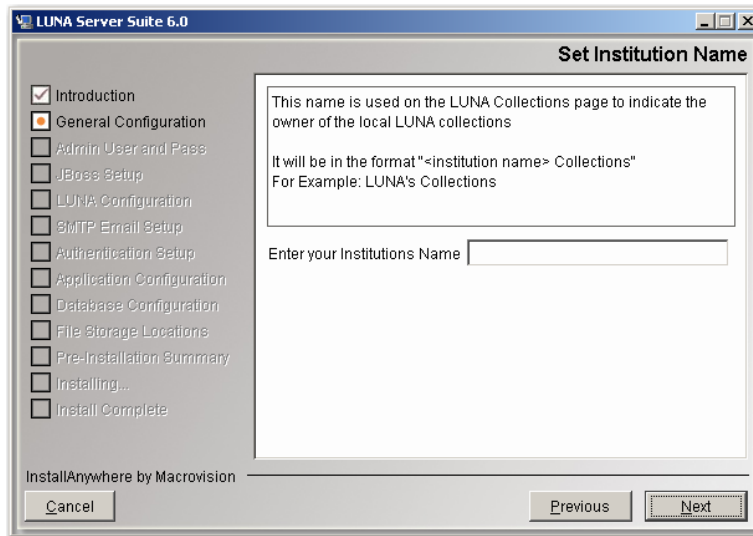
**NOTE:** This password is not encrypted. Do not use your network or system administrator password.



## Institution Name

This name is used on the LUNA Collections page to indicate the owner of the local LUNA Collections.

The format is:  
<institution name> Collections



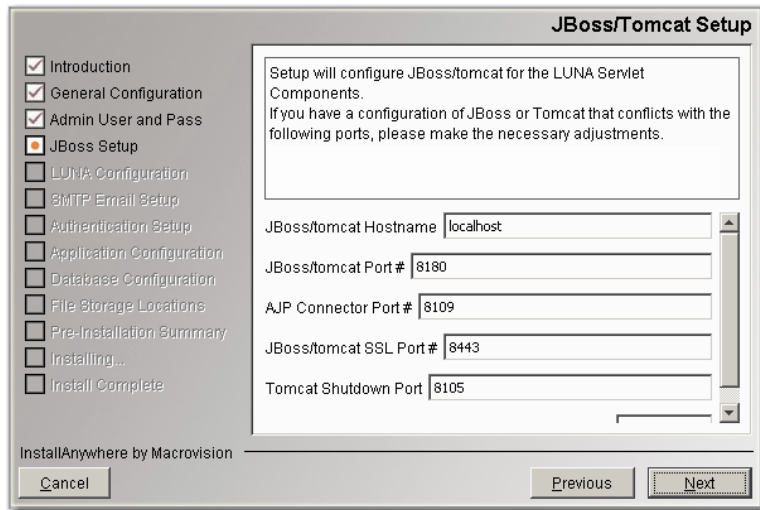
In the example below, it is set to **Luna**.



## JBoss and Tomcat Setup

The LUNA application and LUNA Publisher are served via JBoss or Tomcat. The installation will take care of all major configurations with JBoss and Tomcat but you may choose to select different ports for the application to run on.

**Note:** You are also choosing how much memory to allocate to the application. Make sure this much memory is freely available or the server will have out of memory errors.



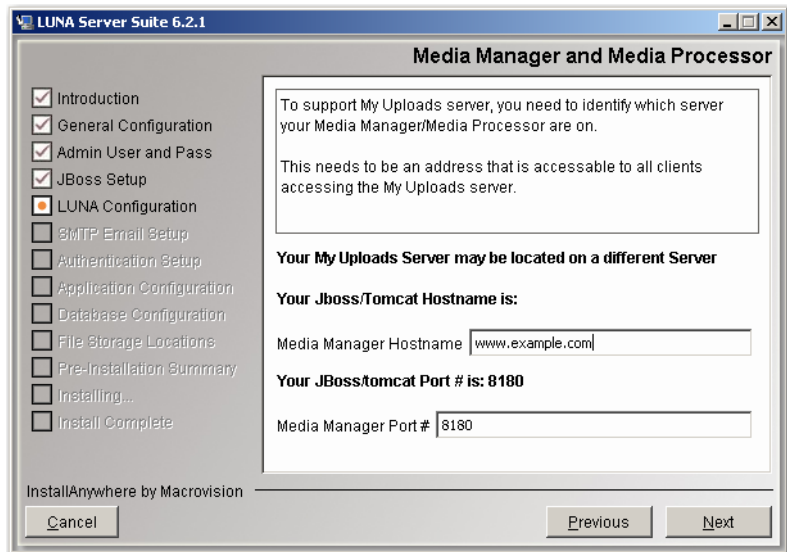
## My Uploads Media Manager and Media Processor

My Uploads allows users to upload image and various other file types from their desktop directly into LUNA.

This address must be available to all end users who will be accessing this feature.

## Important! This is not your Insight Media Manager

Typically this will be the same address and port as your LUNA and LUNA Publisher but it can be installed on a different server.



## LUNA Configuration

This section allows you to choose how the LUNA application is generally configured.

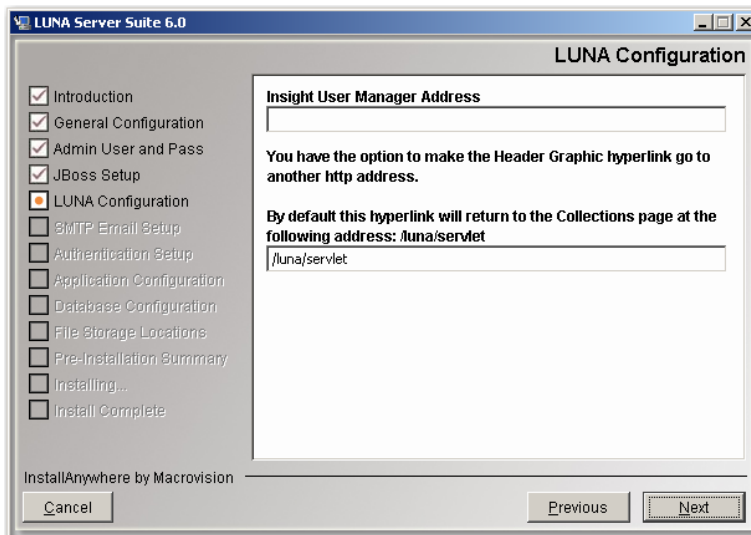
## Insight User Manager Address

LUNA can use your existing Insight User Manager to grant access to your collection resources. You do not need to create the accounts. As a user is logged in, the username is passed to the LUNA system (not including the password) and the user is granted access to the same collections that they had access to in Insight.

## Header Graphic Hyperlink

You have the option to make a link in the Header Graphic go to a specific http address. By default the address will return to the LUNA collections Page (/luna/servlet).

This feature is useful if you want to create a launch page for the LUNA application and from LUNA the user can return to the launch page.



## Enable Google ads

If you would like to place ads on the content of your site to generate potential revenue to support your collections, just check the ads box. The ads will be placed on the right side of the application. Go to <http://www.google.com/intl/en/ads/> to sign up for an AdSense account. You will be prompted later in the installation to provide additional information specific to your AdSense account.

## Enable End User Registration

LUNA has built in end user self management. If you would like your end users to manage their own accounts (allowing them to create Media Groups, presentations

and search External Media), select this item. Later in the configuration you will be asked for your email server information for outgoing messages.

### Access LUNA Commons Collections

Selecting this option indicates you want to receive free collections from the LUNA Commons. You will be required to provide additional information later in the installation process.

### Share Select Collections with the LUNA Commons

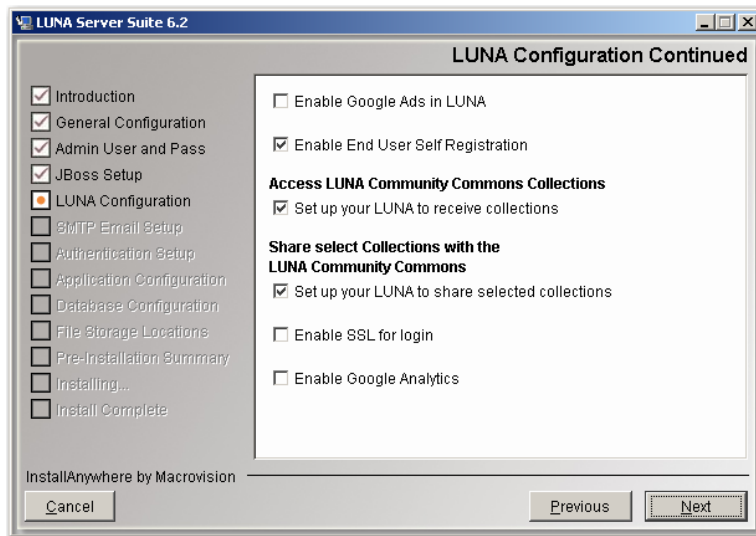
Selecting this option indicates you want to share some of your collections with the LUNA community. You will be required to provide additional information later in the installation process.

### Enable SSL for Login

To prepare your system to support SSL during login, select this item. You will also need to install a certificate to implement the SSL login capabilities.

### Enable Google Analytics

Prepare your system to support Google Analytics. You will also need to have a Google Analytics account to make use of this option. See <http://www.google.com/analytics>



## Access LUNA Commons Collections

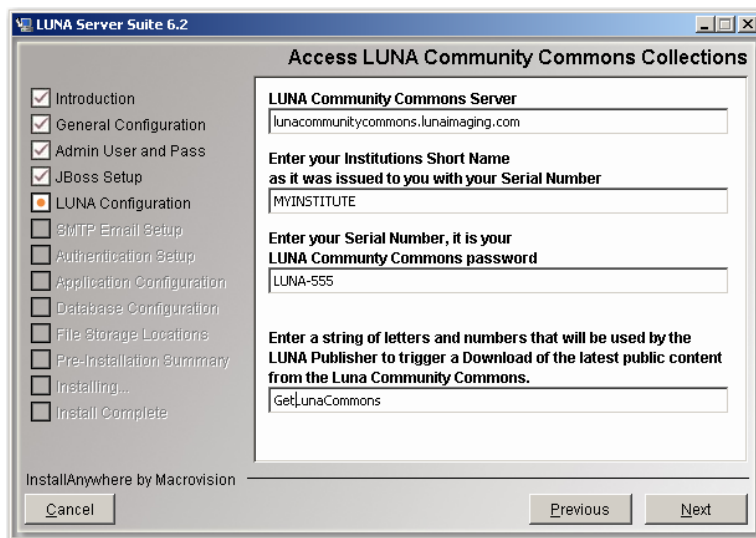
### LUNA Commons Server Address

To access the LUNA Commons, you may need to enter the appropriate Community Commons server address (the default will work unless told otherwise).

### Enter your Institution's Short Name and your Serial Number

When you were issued your Serial Number, you were also issued a Short Name for your institution. This Short Name and your Serial Number are your keys to access the LUNA Commons collections.

Enter a string of letters and numbers with no spaces or special characters. This string will be used in the LUNA Publisher to trigger a download of the LUNA Commons content.

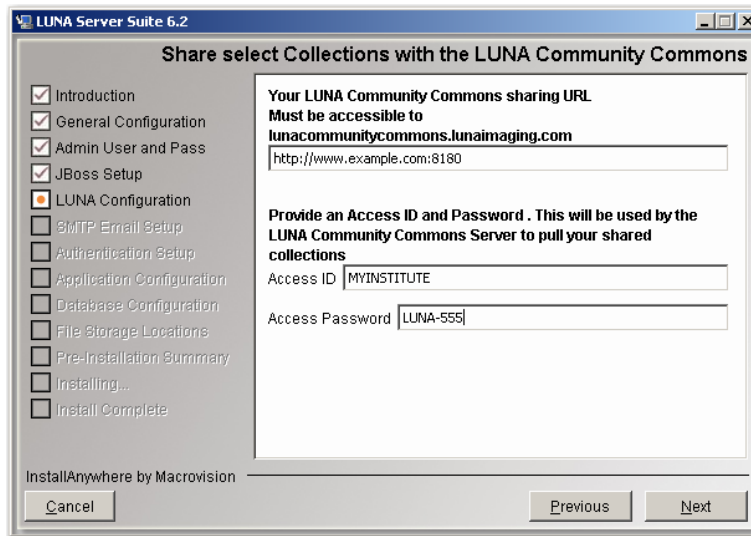


## Share Select Collections with the LUNA Commons

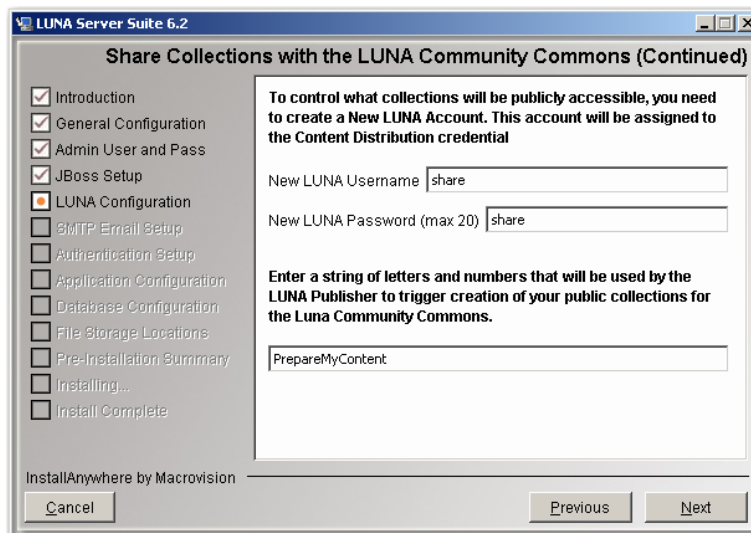
With LUNA you can share some of your collections with the larger LUNA Community.

1. Enter Your LUNA Commons sharing URL.
  - This is the address to your LUNA server. The LUNA Commons Server will use this address to retrieve the collections you decide to share.
2. Enter Your Access ID and Access Password
  - This will be used by the LUNA Commons server to gain access to your selected LUNA collections.
  - By default this has been set to your institution's Short Name and Serial Number.





3. Create a new LUNA account
  - This account will be used to define what collections are being shared with the LUNA Community.
  - Once you have collections in LUNA, you can use the Admin Tools to assign collections to the Content Distribution Credential.
4. Enter a string of letters and numbers with no spaces or special characters. This string will be used in the LUNA Publisher to trigger the creation of your public content that you will share with the LUNA Commons.



## Google AdSense Configuration

If you are seeing this screen, then you have selected to enable Google ads on your site. You will need to provide specific information to enable this feature properly. During your account setup in AdSense, you were provided information appropriate to this feature.

The screenshot shows the 'Google AdSense Setup' window within the LUNA Server Suite 6.0. On the left, a list of configuration steps is shown with checkboxes: Introduction (checked), General Configuration (checked), Admin User and Pass (checked), JBoss Setup (checked), LUNA Configuration (checked), SMTP Email Setup (unchecked), Authentication Setup (unchecked), Application Configuration (unchecked), Database Configuration (unchecked), File Storage Locations (unchecked), Pre-Installation Summary (unchecked), Installing... (unchecked), and Install Complete (unchecked). The main area contains a message: 'You have selected to configure AdSense. Please Provide the following information'. Below this are four input fields: 'Ad Slot' (empty), 'Ad Source URL' (empty), 'Ad Width' (120), and 'Ad Height' (240). At the bottom, there is a 'Google Ads Client ID' field (empty). The window has 'Cancel', 'Previous', and 'Next' buttons at the bottom.

## SMTP Mail Server Setup

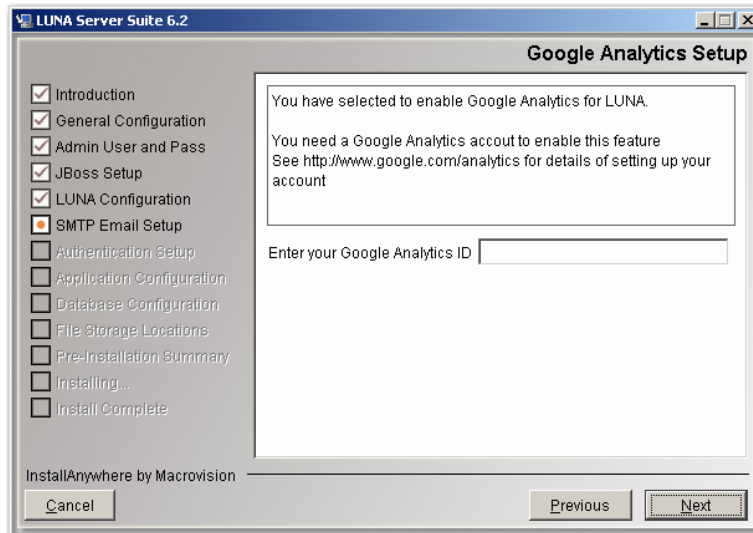
If you selected end user registration, then fill in the following form.

- Your email domain address
- SMTP Port Number
- SMTP User (optional)
- SMTP Password (optional)
- Senders email account (the account end users will respond to if necessary)

The screenshot shows the 'SMTP Email Setup' window within the LUNA Server Suite 6.0. On the left, the same list of configuration steps is shown, but 'SMTP Email Setup' is now checked. The main area contains a message: 'You have selected to allow End User self registration. To allow the end users to manage their accounts, you will need to provide your SMTP information.' Below this are five input fields: 'SMTP Hostname' (mail.example.edu), 'SMTP Port' (25), 'SMTP User' (empty), 'SMTP Password' (empty), and 'Senders Email account' (support@example.edu). The window has 'Cancel', 'Previous', and 'Next' buttons at the bottom.

## Google Analytics Setup

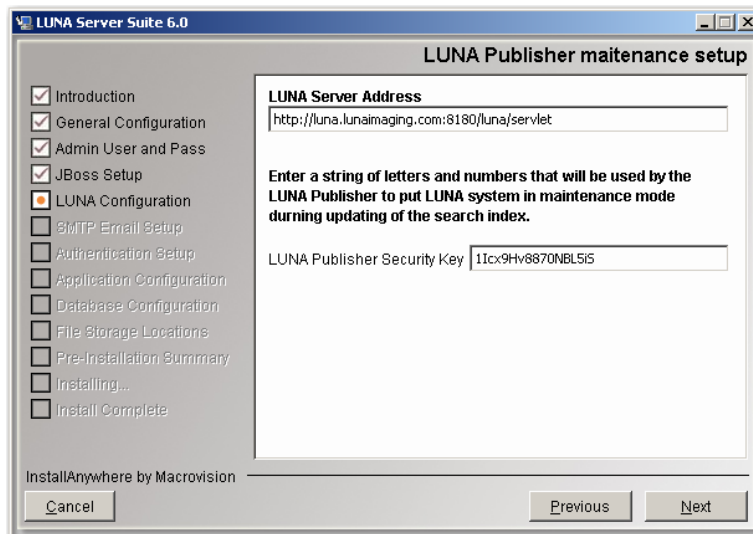
If you selected Google Analytics, you will need to enter your Analytics ID here.



## LUNA Publisher Maintenance Setup

The information supplied in this panel is used when LUNA needs to be placed into a maintenance mode so that you can perform server adjustments or when the LUNA Publisher needs to replace the Lucene index with an updated version.

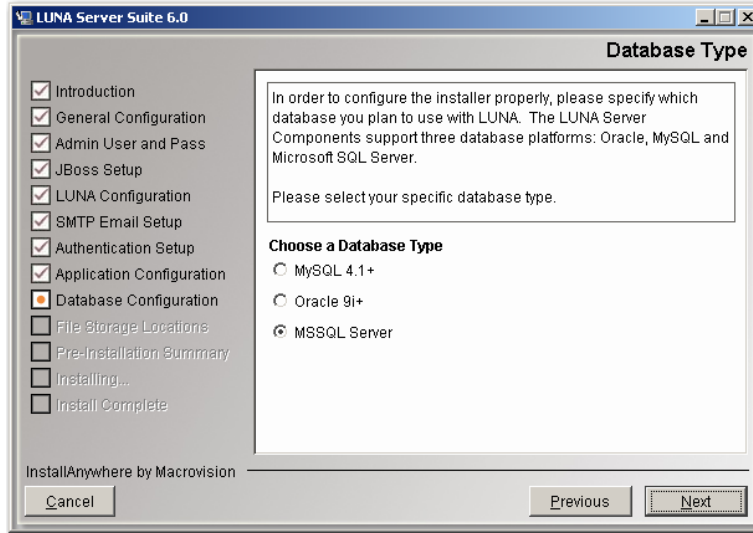
The maintenance mode is invoked via a URL with a security key. We suggest making the security key obscure by using only web friendly characters and letters.



**NOTE:** If you are Upgrading or Reconfiguring, then skip to [LUNA Graphics URL](#)

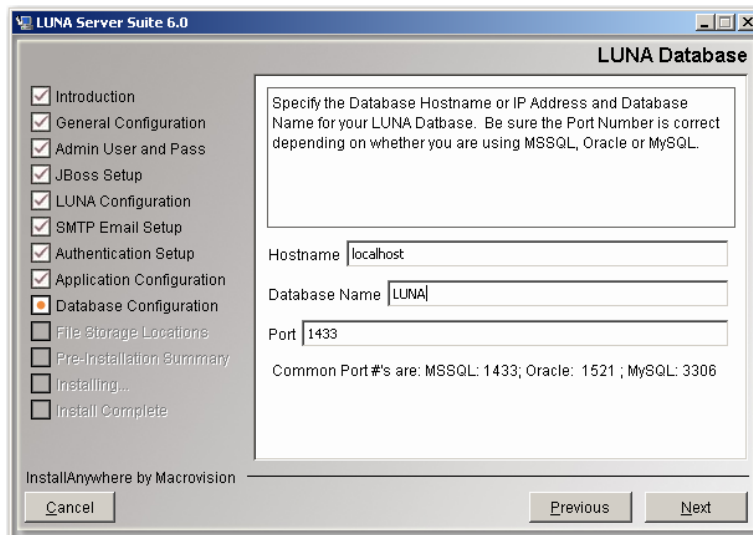
## Choosing a Database Type

The installer is designed to connect to your database server and to create database tables, fields and indexes for your LUNA Server and LUNA Publisher. Please choose the database type you wish to use. The information you identify here will be used to configure LUNA.



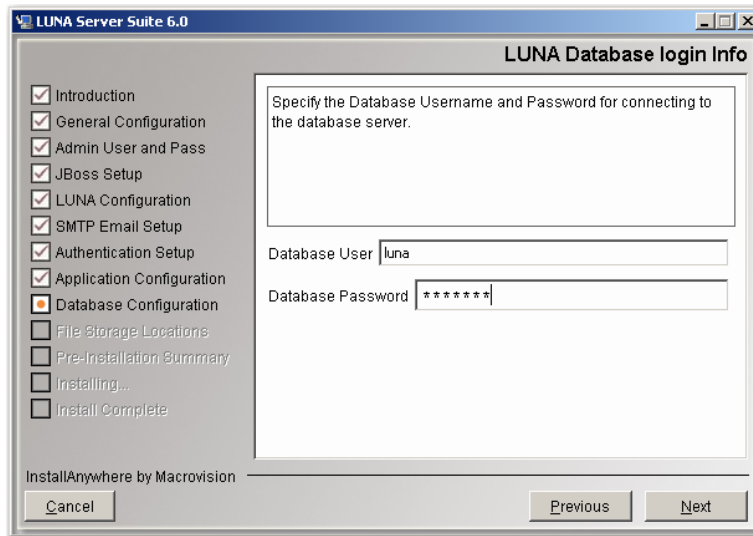
## LUNA Database Information

Provide the information necessary to connect to your database, including the hostname, database name (SID Name if you're using Oracle), and database port. The installer will offer default values based on information provided earlier. Review the defaults (and change them as needed).



## Database Username and Password

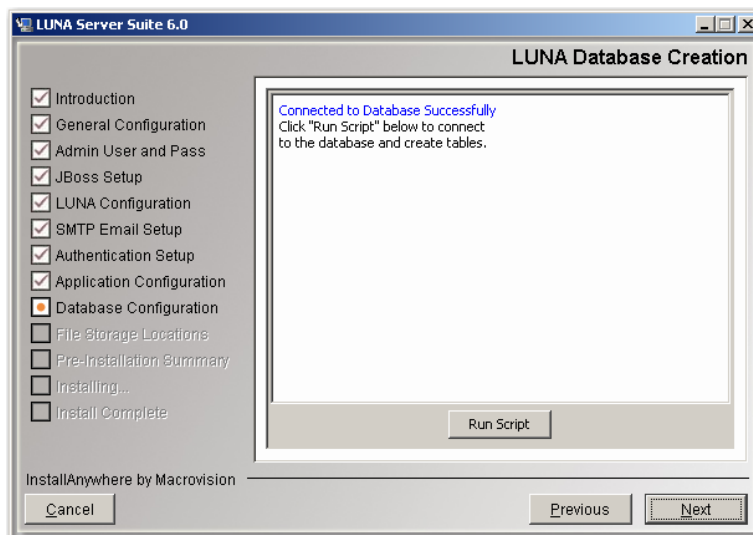
Please specify the username and password for your database. This is the username and password that LUNA should use to connect to the database.



**WARNING:** the installer will **DROP ALL LUNA TABLES** once it has connected, so be sure that you are not installing over an existing version of LUNA. (The installer will warn you again before it actually drops any tables.)

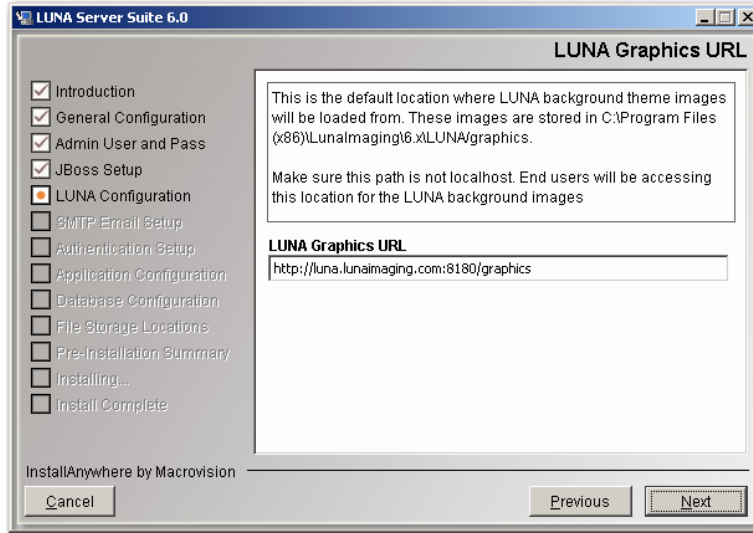
## Creating the LUNA Database

Once the installer has tested the connection, it will present you with the database creation script window. Click "Run Script" to create the LUNA tables and indexes.



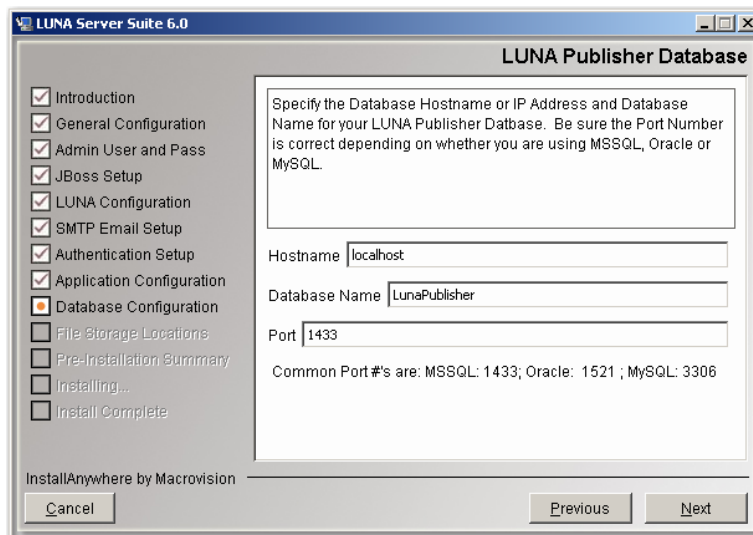
## LUNA Graphics URL

The LUNA Graphics URL is used to access LUNA theme header graphics. Just make sure this URL is externally accessible from the installed machine. Do not use localhost or any other internal domain unless you know for sure the content will not be used outside of your institution.



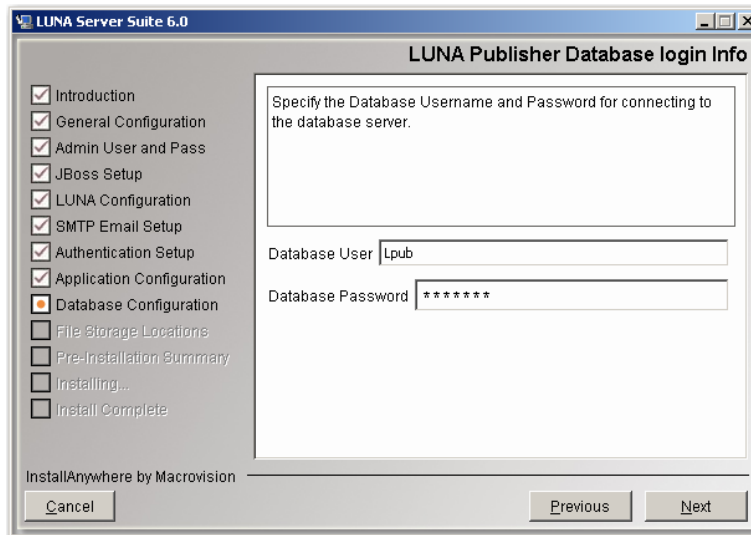
## LUNA Publisher Database Information

Provide the information necessary to connect to your database, including the hostname, database name (SID Name if you're using Oracle), and database port. The installer will offer default values based on information provided earlier. Review the defaults (and change them as needed).



## Database Username and Password

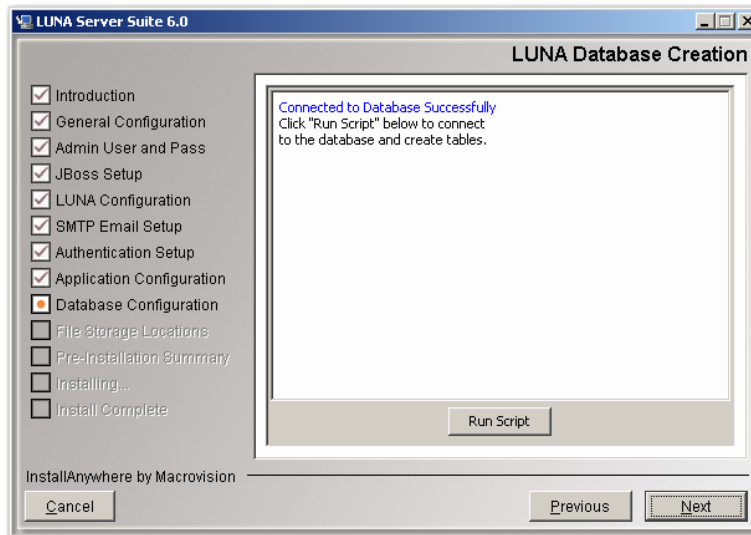
Please specify the username and password for your database. This is the username and password that LUNA Publisher should use to connect to the database.



**WARNING:** the installer will **DROP ALL LUNA Publisher TABLES** once it has connected, so be sure that you are not installing over an existing version of LUNA Publisher. (The installer will warn you again before it actually drops any tables.)

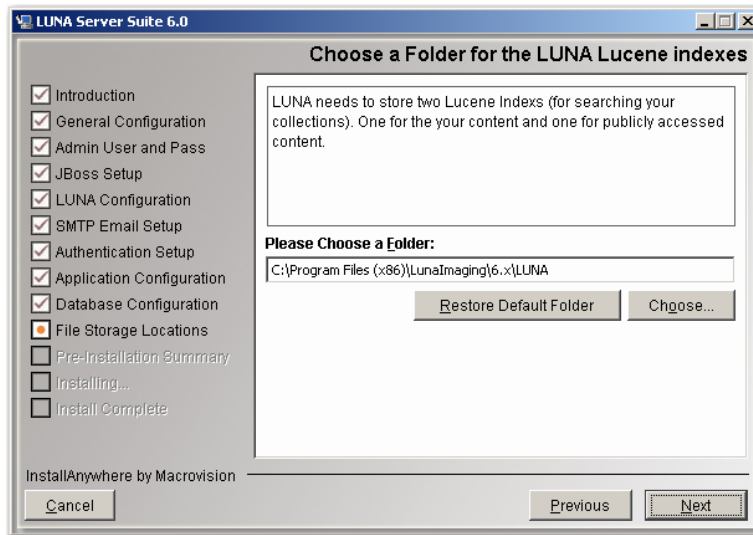
## Creating the LUNA Publisher Database

Once the installer has tested the connection, it will present you with the database creation script window. Click "Run Script" to create the LUNA Publisher tables and indexes.



## Lucene Index Folders

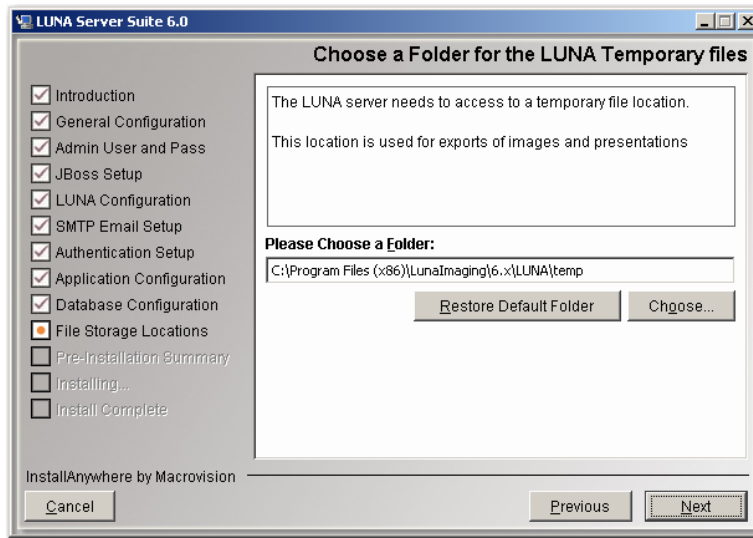
LUNA uses Lucene to search for content in your collections. These indexes can add up to hundreds of megabytes depending on the content you have in your collections. 160,000 objects takes about 400MB but this is entirely dependent on the size of your collections that you are accessing. So choose an appropriate location that can grow with your collections.



## LUNA Temp Files Location

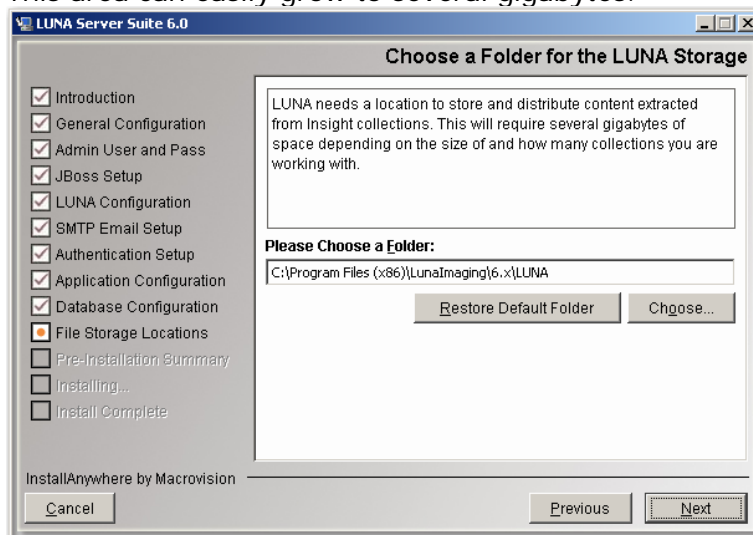
During the use of LUNA, content is exported and this location is used to store that information temporarily.





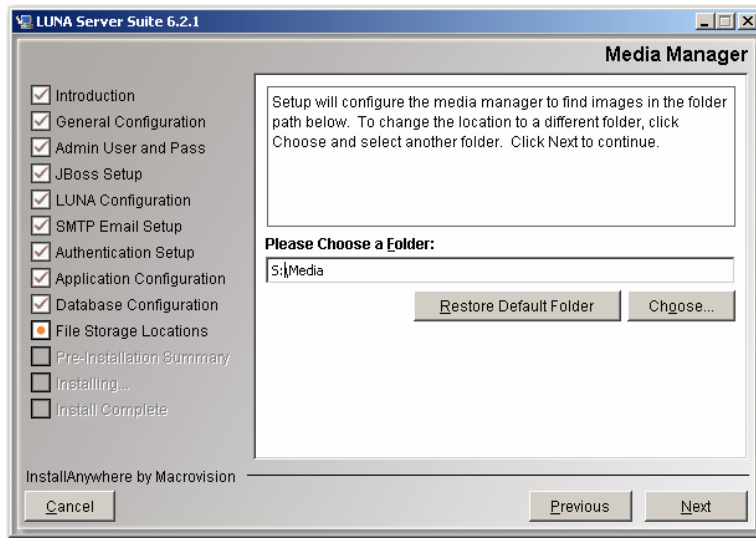
## LUNA Storage

LUNA and the LUNA Publisher need space to store information extracted from Insight collections and a place to create the Lucene indexes during the publishing process. LUNA also uses this area for content distribution with the LUNA Commons Server. This area can easily grow to several gigabytes.



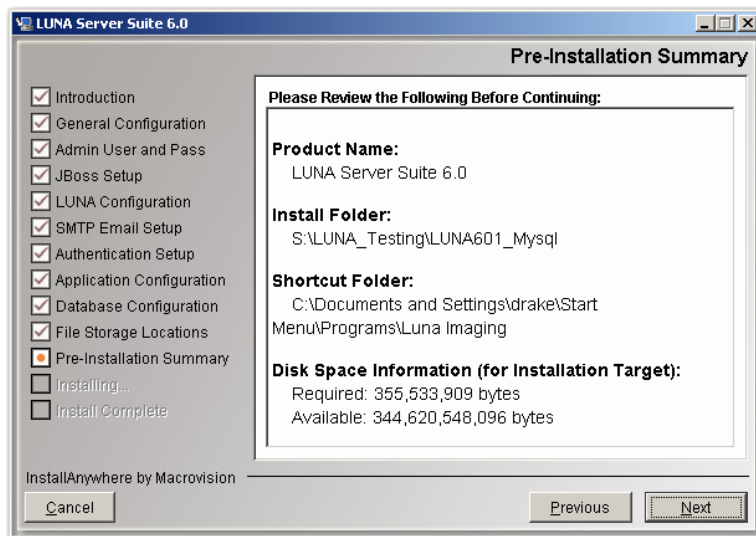
## Media Manager for My Uploads Storage Location

The My Uploads server needs a location to store the content that is uploaded to it. Depending on the expected level of use, choose a storage location.

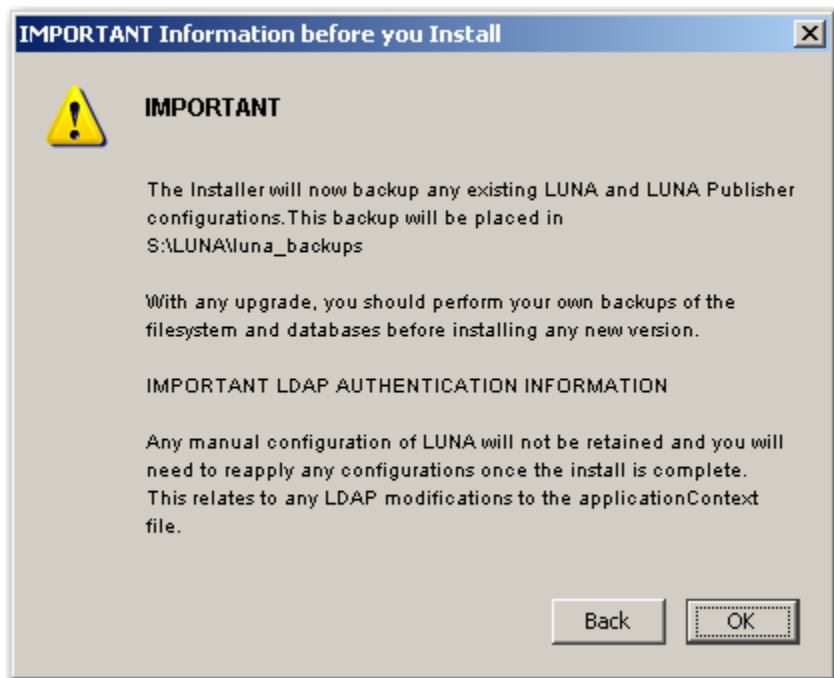


## Start the Install Process

This may take several minutes depending on the server speed and how you are accessing the installer.



Before Installing LUNA and the LUNA Publisher you will see this **IMPORTANT** message.



**\*\*\*IMPORTANT NOTE for users of LDAP configurations\*\*\***

**The Installer will now backup any existing LUNA and LUNA Publisher configurations. This backup will be placed in  
<USER INSTALL DIR>/luna\_backups**

**With any upgrade, you should perform your own backups of the file system and databases before installing any new version.**

#### **IMPORTANT LDAP AUTHENTICATION INFORMATION**

**Any manual configuration of LUNA will not be retained and you will need to reapply any configurations once the install is complete.  
This relates to any LDAP modifications to the applicationContext file.  
Your existing LUNA and LUNA Publisher will be backed up to the luna\_backups in your install directory within a dated zip file.**

## **Starting LUNA and the LUNA Publisher**

You can start these two servers by starting the Tomcat or the JBoss server.

Go to:  
<Install Directory>/tomcat/bin  
or  
<Install Directory>/jboss/bin

For Tomcat:

We have also supplied you with our standard java service wrapper version for starting and stopping the application:

start\_jboss.bat on windows and start\_tomcat.sh for Linux and Solaris will start tomcat in a console mode.

If you would like to start tomcat as a service on windows, we have supplied you with the install\_as\_service.bat file.

If you want to run jboss in the background using the java service wrapper on Linux or Solaris, you can start it with:

```
./tomcat_service.sh start
```

The script has the following options:

console | start | stop | restart | status

For Jboss:

You can use the standard jboss supplied run scripts run.bat or on Linux and Solaris you can start the servers by executing the run.sh script. If you want to run this in the background we suggest running:

```
nohup ./run.sh &
```

We have also supplied you with our standard java service wrapper version for starting and stopping the application:

start\_jboss.bat on windows and start\_jboss.sh for Linux and Solaris will start jboss in a console mode.

If you would like to start jboss as a service on windows, we have supplied you with the install\_as\_service.bat file.

If you want to run jboss in the background using the java service wrapper on Linux or Solaris, you can start it with:

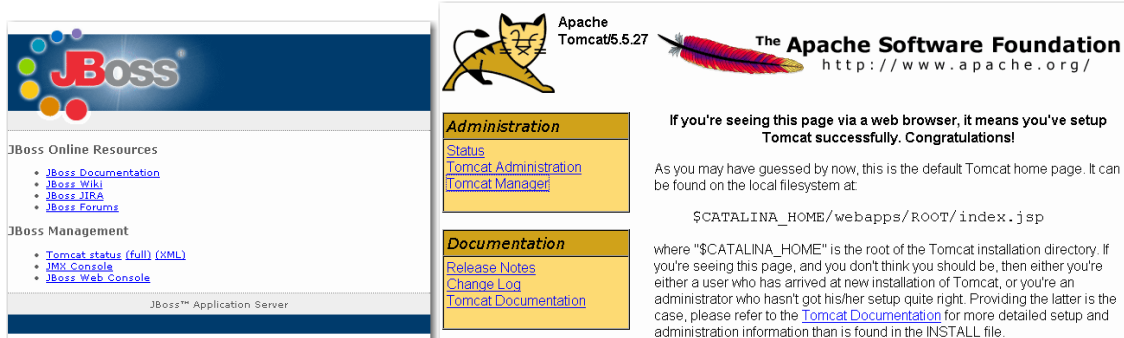
```
./jboss_service.sh start
```

The script has the following options:

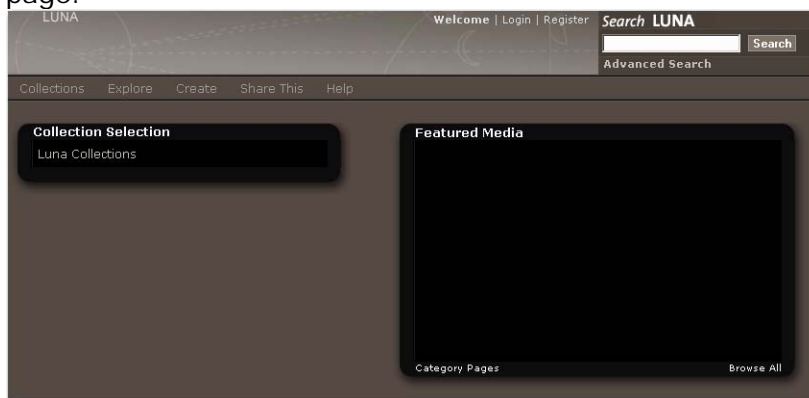
console | start | stop | restart | status

Once started go to <http://www.example.edu:8180/>

You should see something like one of the following:



The LUNA application will now be available at <http://www.example.edu:8180/luna/servlet> and it will look similar to the following page:



# My Uploads Server testing

## Testing the Media Manager

In your browser, go to <http://localhost:8180/MediaManager/srvr>

You should get a message like the following:



## Testing the JPEG2000 Decoder

<http://localhost:8180/MediaManager/jp2ktest>

You should get a page like the following:



If you see any errors, see the **Testing the JPEG2000 Decoder & the Media Manager** in the Install and Configuration Guide.

# Adding Insight Content to LUNA

## Introduction

It's fairly easy to add Insight content to LUNA but first you should know what LUNA is and what it is not.

LUNA is a search interface and a place to work with media content. LUNA is not the repository of the content. LUNA allows the end user to select, organize and make use of various image and media content.

Currently, in version 6.2.1, LUNA supports three kinds of source content. You can access and use Insight content and you can access and use content from Flickr and content from your own desktop using the My Uploads feature.

Insight Studio is used to prepare content for LUNA using the LUNA Publisher and the LUNA theme header graphic creator. These tools are available from the Insight Studio Task Menu.



**Note:** The preferred method to upload a Header Graphic is now located in the LUNA Publisher NOT Insight Studio. See section on the [LUNA Theme Header Graphic](#)

**Note:** You do not need to upgrade your Insight Collection Managers to work with LUNA. LUNA will work with all 5.x Insight Collection Managers.

The only suggested adjustment you need to make is to update the language bundles on the Insight User Manager. This will ensure that you see the correct text labels while using the 6.2.1 Insight Studio tool.

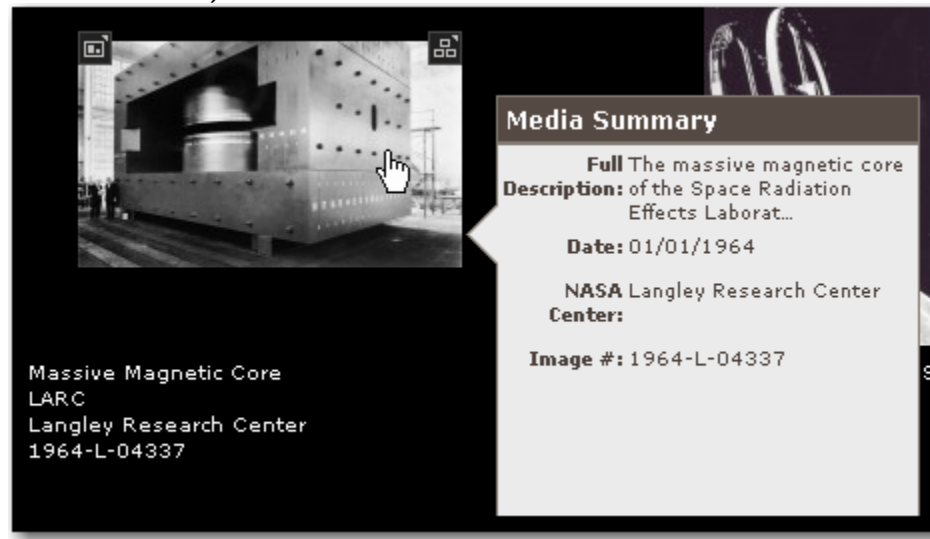
## The LUNA Publisher

So what does it mean to add content to LUNA? Well it's pretty simple; it means extracting all descriptive data from Insight and placing it into an index that LUNA uses to search. It also sets up and provides LUNA with information to connect to the Insight collection.

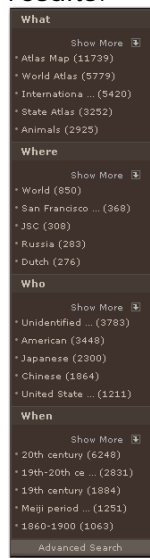
The LUNA Publisher is the tool you use to do the following:

- Schedule when and how often the LUNA collection index is updated from the Insight Collection.
- Setup LUNA specific characteristics

- Choose Media Summary fields (provides additional roll-over information).



- Choose the Who, What, When, Where fields used for filtering search results.



- Identify the URL to the LUNA header graphic.
- Using the Merge and Load Task, all individual collection indexes are merged into a single index and then loaded into the live LUNA system.

## LUNA Theme Header Graphic

The LUNA theme header graphic is the background that shows up at the top of the LUNA interface and can be different for each collection. This is used to provide collection identity.



The graphic needs to be 754 x 65 and should fit the theme being used by fading to a solid color on the right of the graphic (R=133, G=124, B=117 or the hex is #857C75).



To upload your Header Graphic, locate the Header Graphic section of your LUNA Publisher.

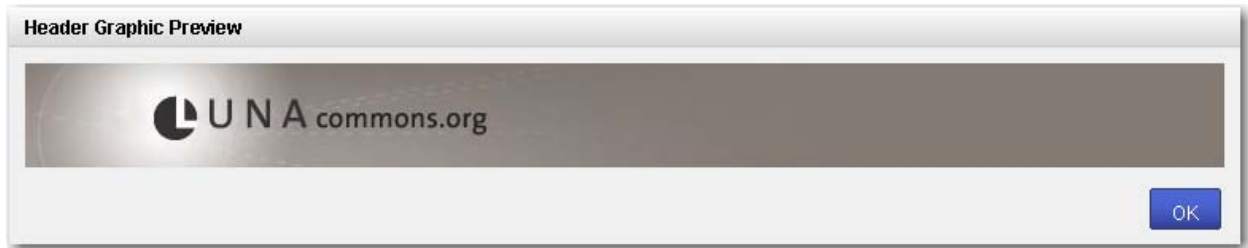
Click "Select header graphic".

The image shows a screenshot of the "Collection Properties" form in the LUNA Publisher. The form has a tabbed interface with tabs for "Schedule Task", "Schedule URL Request", "Task List", and "Task Log". The "Schedule Task" tab is selected. The form contains the following fields: "Collection Name:" with the value "vid test"; "Task Description:" with an empty text box; "Theme:" with a dropdown menu showing "default"; "Select header graphic" with a blue link; "Status:" with an empty text box and a blue link "Upload File"; and "Header Graphic URL:" with a text box containing "http://www.example.com:8180/graphics/luna-" and a "Preview" button.

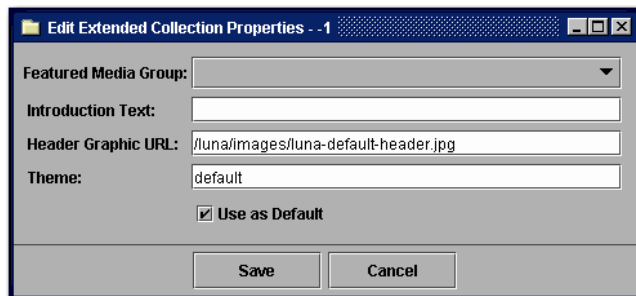
Next, click "Upload File". You will then be presented with a confirmation dialog box.

The image shows a "Confirmation" dialog box. It has a title bar that says "Confirmation". The text inside the dialog box reads: "If you click OK your Header Graphic will get uploaded and any changes you just made to this form will be lost." followed by "If you do not want to lose your changes click Cancel and select Save Task. Then return to this task and upload your Header Graphic." and "The uploaded file will be renamed to luna-LUNADEPLOYICM-226-NA.jpg". At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

You can also Preview the graphic once it is uploaded.



To setup a LUNA header graphic that will be used when more than one collection is being accessed, edit the Extended Collection Properties for the "-1" Collection ID.



The default is set to /luna/images/luna-default-header.jpg

**Note:** This path refers to an image stored within the LUNA software. This is used as the default location.



## Let's Get Started

### Prerequisites

You need the following to proceed:

- LUNA and the LUNA Publisher need to be installed and running.
- 6.x version of Insight Studio configured with access to the LUNA Publisher.
- At a minimum, the language bundles on the Insight User Manager need to be updated.
- Insight Studio access to the collections you will be adding to LUNA.
- Inscribe access to the collection(s) you will be publishing.



**Note:** The LUNA Publisher pulls the descriptive metadata and media information from a form of Inscribe. In certain collections that were created prior to 5.x, this content may not be properly accessible. If you do not see the correct images or data in the Inscribe tool, contact Luna's support department for assistance in preparing your collection for LUNA.



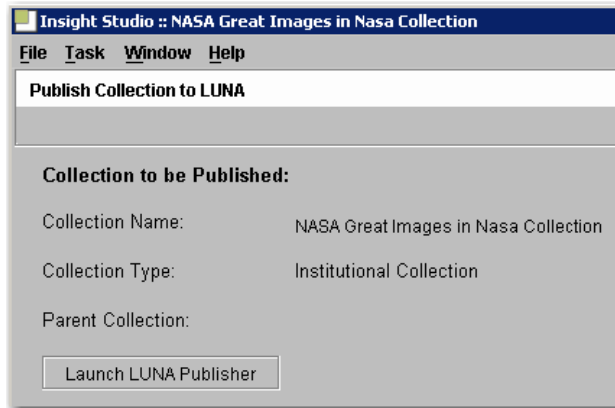
Collections that were created in Insight 5.x+ will not have this issue.

## Publishing a Collection

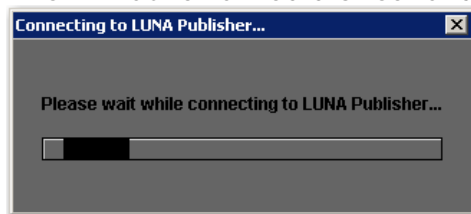
Start Insight Studio, select the collection you want to publish to LUNA and from the Main Task Menu select the LUNA Publisher.



Next, select "Launch LUNA Publisher".



This will launch a web browser and connect to the LUNA Publisher.



Once in the LUNA Publisher, you can make your selections in the following areas:

- Enter a Task Description (optional).
- Choose the Theme for your collection.
  - Only "default" is available in the initial release of LUNA. Additional themes will become available in the future. These new themes will change the color scheme of the entire application.
- Choose the LUNA Header Graphic URL for your collection. If you have not selected one, the default graphic will be used.
- Choose the Insight User Group that will be used to access the data from your Insight Collections.
- Select the Title Field from the drop down list. This Title will be used to identify individual media items on several pages within the LUNA application, such as the Detail view and as a label in a slideshow.

- Select up to 4 Summary Fields to display. The Summary Fields will display as the user moves their mouse over the thumbnail images.
- Drag and Drop up to 20 fields into the Who, What, Where and When categories.
- Choose a recurring schedule for the LUNA Publisher to perform updates of the LUNA search index.
- You have 4 options When completing this task
  - Save Task (will only save the task)
  - Save and Run Task (will save and run the task now)
  - Save and Schedule Task (will save then execute the task on a schedule)
  - Save, Schedule and Run Task

Once you schedule this task, the LUNA Publisher will do the following:

- Archive the data from Insight.
- Produce an Index for the Collection.
- When the Merge and Load task is activated, all collections that have been indexed will be merged and the new Master Index will be created and placed on the live LUNA server.



**Note:** You need to activate the Merge and Load task before LUNA will make the collections live.

## Activating the Merge and Load task

### So what is Merge and Load?

During the Publishing process, a collection is turned into a searchable index for a specific collection. Each index is stored in the collection\_indexes folder on your server.

Once you have published all collections that you currently want to make available in LUNA, these separate published indexes need to be merged into a single index. Then when the merge process is complete, the merged index needs to be loaded as the active current index. Once loaded you can search all collections that have been published to LUNA.

### Now to activate the Merge and Load task

In the LUNA Publisher task list, locate the Merge and Load task. This will be the one at the top of the List. Click the Modify button.

Schedule Task Task List Task Log								
Task List								
Task ID	Job Name	Collection Name	User Server Address	Frequency	Status			
1	Merge and Load			Every Sun, Mon, Tue, Wed, Thu, Fri, Sat at 02:00	inactive	Detail		Modify
2	nasaNAS-5-NA-1212518746932	NASA Great Images in Nasa Collection	nasa.lunaimaging.com	Every Sun at 00:00	in-progress	Detail	Delete	Modify

- Now set your preference on how often the Merge and Load task will take place. If you want it to run every night at 2am, select all the days of the week and change the hour to 02.
- You have 4 options When completing this task
  - Save Task (will only save the task)
  - Save and Run Task (will save and run the task now)
  - Save and Schedule Task (will save then execute the task on a schedule)
  - Save, Schedule and Run Task

Schedule Task	Task List	Task Log
<b>Scheduling:</b>		
Run on the following schedule:		
Time of day to run: Hour:	00	Minute: 00
<input type="button" value="Weekly"/> <input type="button" value="Monthly"/>		
Day(s) of week:		
<input checked="" type="button" value="Sun"/> <input type="button" value="Mon"/> <input type="button" value="Tues"/> <input type="button" value="Wed"/> <input type="button" value="Thu"/> <input type="button" value="Fri"/> <input type="button" value="Sat"/>		
<input type="button" value="Save Task"/>		
<input type="button" value="Save &amp; Run Task"/>		
<input type="button" value="Save &amp; Schedule Task"/>		
<input type="button" value="Save, Schedule &amp; Run Task"/>		

### Testing your LUNA Collections

Once your collection(s) have been Published, Merged and Loaded, you will be able to view your Collections in LUNA.

The address to your LUNA collection will be similar to the following.  
<http://www.example.edu:8180/luna/servlet>

If you would like to access your collection(s) without the port number (8180), you will need to configure the system to use the AJP connector. There are instructions on how to work with the AJP Connector for both Apache and IIS available on the web.

This document does not cover how to configure the AJP connector.

# Migrating Insight Media Groups and Shares to LUNA

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## Introduction

You can perform a one time only migration of Media Groups and Share Folders from your Insight Collections to LUNA.

This process is a single direction process and you will NOT be able to synchronize Media Groups between LUNA and Insight.

You should plan your timing of this process carefully. This should be done with your end users knowledge of what and when this process will take place. Your end users may have a significant amount of work invested in creating and managing these Media Groups and Shares. They should also be very familiar with the new LUNA interface and how they can access their Media Groups once migrated.

## Migrating the Content

### Prerequisites

On the Install disk for LUNA you will find the utility for the migration in \utilities\media\_group\_migration\_to\_LUNA folder

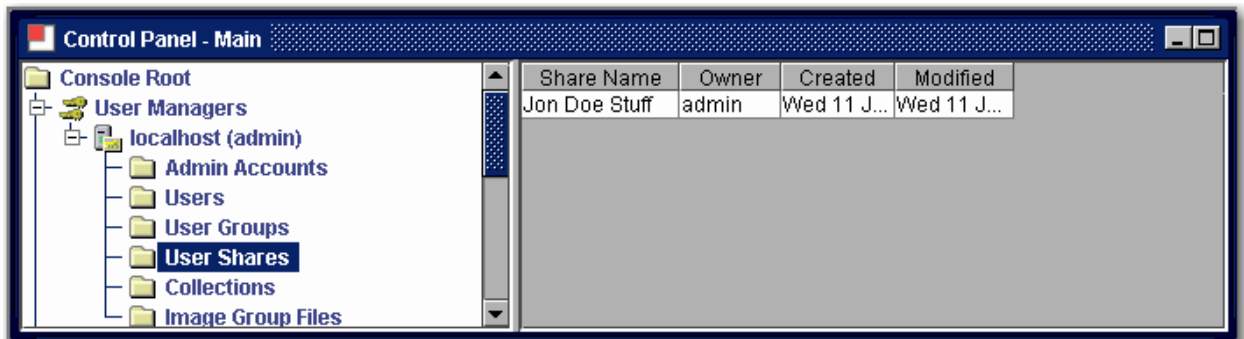
- You will need access to each Insight Collection Manager on your server and database port access. Basically, if you can run the Admin Tools from the machine doing the migration, then you have sufficient database access to perform the migration.
- You will need the InsightServer.dat for each collection you plan to migrate the Collection level Groups from.

- You need the InsightUserServer.dat for the User Manager.
- You need the LunaServer.dat that was created at the Install time of LUNA. This file is contained in <LUNA Install directory>/resources/For\_Media\_Group\_Migration



These files have the database connection information in them and will be used for the migration.

- You will need access to the User Managers Image-Group-Files folder. This can be a copy or the original.
- The utility uses Java 1.4 and it will need to be available for the migration. All of the Insight servers use Java 1.4 so you can reference the Insight Server version.
- Make sure all Shares have an owner. This can be done using the Admin Tools and looking at the Owner Column of the User Shares. If they do not have an owner, please assign one or a random owner will be assigned at the time of migration.



### IMPORTANT NOTE

If you are migrating virtual collections, you will need to modify the **VCIDToLunaID.txt** file.

On the left enter the Insight VCID for the collection  
VC\_Archivision\_Digital\_Research\_Library\_(Base-1)

Then enter a tab character

Next enter the Institution ID for the LUNA collection  
ARCHIVISIONACM\_Base-3

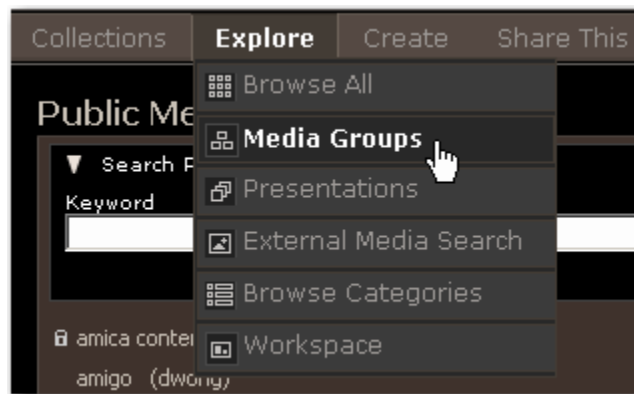
For example:

VC\_Archivision\_Digital\_Research\_Library\_(Base-1)      ARCHIVISIONACM\_Base-3

Do this for each virtual collection you are migrating from.

## Steps for the Collection Level Group Migration

1. Copy the media\_group\_migration\_to\_LUNA folder to the location where you will perform the migration.
2. Copy the LunaServer.dat into your media\_group\_migration\_to\_LUNA folder.
3. Edit the LunaServer.dat.
  - a. Modify the MediaGroupDefaultPassword= property to set the password used to Protect the Media Groups in LUNA.
  - b. Set the ImageGroupFileDir= to point to the Image-Group-Files folder.
4. Copy the InsightServer.dat into your media\_group\_migration\_to\_LUNA folder.
5. Edit to the run\_collectiongroupexport.bat (windows) or run\_collectiongroupexport.sh (Linux or Solaris) to point to a local version of Java 1.4 if it is not in your PATH environment.
6. Execute the run\_collectiongroupexport script (only once) if you run this twice, you will end up with duplicate Media Groups.
7. Verify that the Media Groups are in your LUNA system located in Explore/Media Groups.



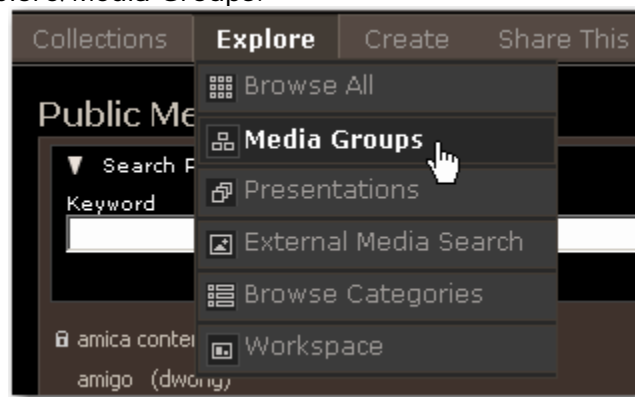
8. Repeat for each Collection Manager that you are migrating Collection Level Media Groups from by replacing the InsightServer.dat.

## Steps for Migrating Insight Shares and Media Groups

1. Copy the media\_group\_migration\_to\_LUNA folder to the location where you will perform the migration.
2. Copy the LunaServer.dat into your media\_group\_migration\_to\_LUNA folder.



3. Edit the LunaServer.dat.
  - a. Modify the MediaGroupDefaultPassword= property to set the password used to Protect the Media Groups in LUNA.
  - b. Set the ImageGroupFileDir= to point to the Image-Group-Files folder.
4. Edit to the run\_shareexport.bat (windows) or run\_shareexport.sh (Linux or Solaris) to point to a local version of Java 1.4 if it is not in your PATH environment.
5. Execute the run\_shareexport script (only once). If you run this twice, you will end up with duplicate Media Groups.
6. Verify that the Media Groups are in your LUNA system located in Explore/Media Groups.



# Managing LUNA with the Administrator Tools

---

## Introduction

The Administrator tools have been enhanced to incorporate tasks for managing the LUNA application and configuration.

In the Administrator Tools you can:

- Manage user rights
- Manage Credentials
- Manage IP range access privileges
- See what collections LUNA has loaded
- Manage the LUNA Application Configuration
- Manage the Collection Properties
- Place the LUNA Application into maintenance mode

## Managing User Rights and Access Privileges

Before defining how to manage users and their privileges, you need to understand what options exist and how they are integrated with current Insight User Management.

If you have been working with Insight, then you should be familiar with how Insight grants access to collections. LUNA can work with existing Insight authenticators to grant your users access to your collections.

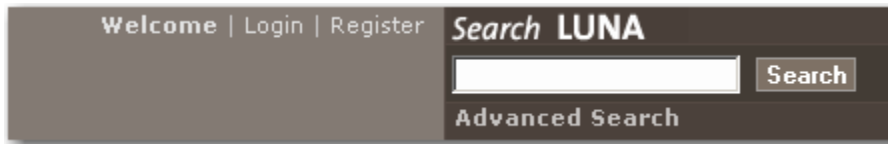
During your installation, you were asked for your User Manager's address. If you are using the default Insight User Manager to grant access to your collections, then you do not need to do anymore work to allow your users access to collections in LUNA.

LUNA also has several other authenticators that can be used to grant access to your Collection resources.

- LUNA self registration and user management
- Integrate with Active Directory LDAP
- Authenticate via LDAP

## LUNA Self Registration

During the install process you were given the option to let users self register in LUNA. If you selected this option you will see the Register option at the top of the LUNA application.



This allows the user to create and manage their own account in LUNA. Once registered, the user will be granted the default privileges defined in the default Credential.

### **Integrate with Active Directory Using Kerberos and LDAP**

As with Insight, LUNA can be integrated with Active Directory to grant access to your Collections.

To configure LUNA with your Active Directory server, you will need to contact our support department for instructions on your specific configuration [lunasupport@lunaimaging.com](mailto:lunasupport@lunaimaging.com). This document does not go into the configuration details of Active Directory integration.

### **Integrate with LDAP**

As with Insight, LUNA can be integrated with LDAP to authenticate your users and grant them access to your collections.

To configure LUNA with your LDAP server, you will need to contact our support department for instructions on your specific configuration [lunasupport@lunaimaging.com](mailto:lunasupport@lunaimaging.com). This document does not go into the configuration details of LDAP.

### **Advantages of LUNA Authentication Methods Not Available in Insight Java Client**

LUNA authentication has been designed to be more flexible to allow for future authentication methods and to allow for mixed authentication methods to be used.

LUNA can be configured to use more than one authentication method in your environment. LUNA can be setup to step through any number of authenticators. For example:

- You can have LUNA access the Insight User Manager and also allow for LUNA self registration.
- You can have an LDAP server authenticate and use the Insight User Manager to grant access to individuals who are not in your LDAP server.

There are many ways LUNA can be configured. Please contact [lunasupport@lunaimaging.com](mailto:lunasupport@lunaimaging.com) for any questions you might have.

## **LUNA's Escalating Collection Access**

LUNA has also been designed to grant increasing access as a user passes certain conditions.

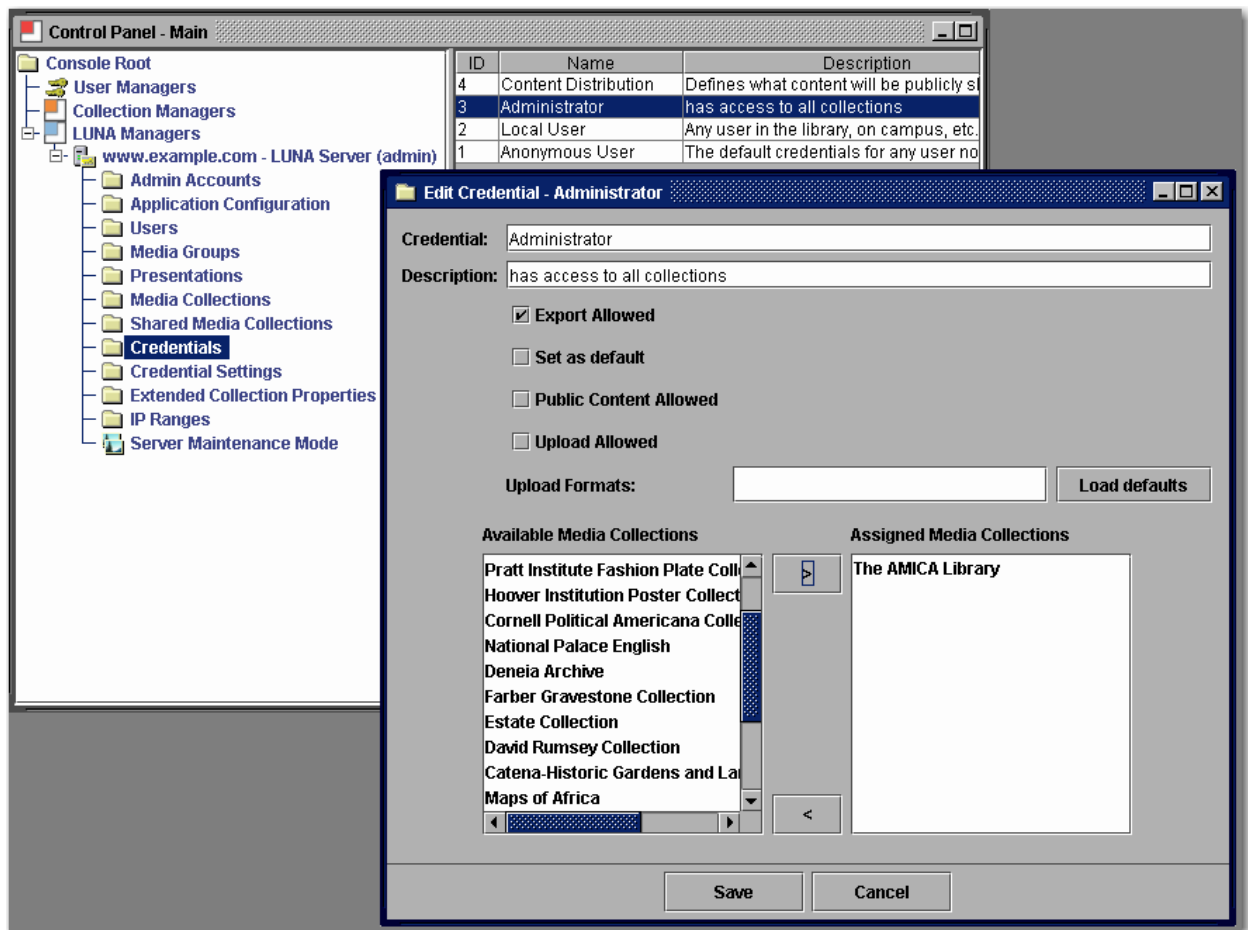
At your institution you may want to do the following:

- Level 1 anonymous user - off site but you still want to make some of your collections accessible.
- Level 2 (within a larger block of IP's) – on site privileged collections are accessible.
- Level 3 (within a restricted block of IP's) – on site but in a particular area where the user is granted access to restricted collections.
- Level 4 (logged in to LUNA) - granted access to even more collections with the ability to export.

This is a very flexible system and can meet many needs for granting varied collection access.

## **Credentials**

Credentials are used to define a set of privileges to selected collections.



There are four Credentials by default in your LUNA application. You are responsible to define what each one of these will be used for. You can create as many Credentials as you want.

With a Credential you can:

- Define what collections are accessible
- Indicate if exporting will be allowed (this includes media and presentation exports)
- Define it as the default (only one allowed)
- Indicate if the LUNA Commons (publicly shared collections) will be accessible
- Grant Access to My Uploads
- Define the My Upload formats that a user can upload to LUNA

Only one credential can be assigned to:

- An IP Range
- A User
- Default (Anonymous User)



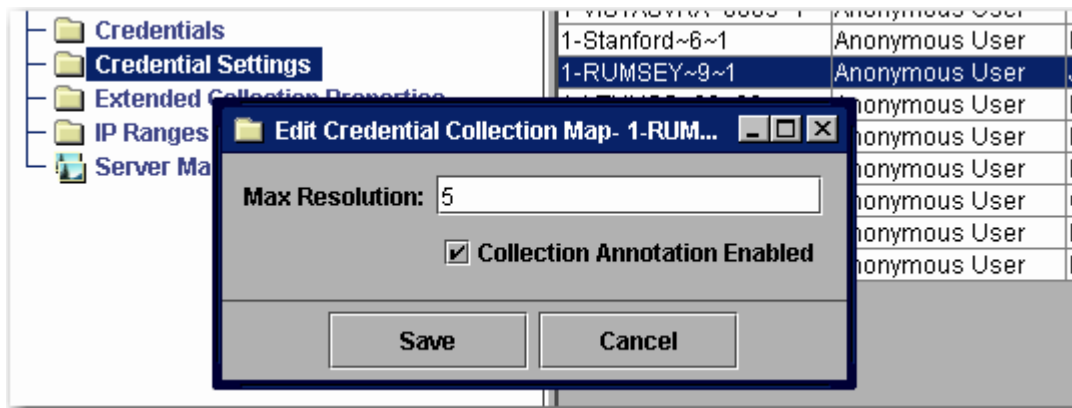
Run Maintenance Mode twice to load your new Credential settings.

## Credential Settings

Using Credential Settings, you have the following three options: 3, 4 and 5.

- 3 indicates the user has up to Size 3 access (768 pixels on the long side).
- 4 indicates the user has up to Size 4 access (1536 pixels on the long side).
- 5 indicates the user has full access privileges to the images.

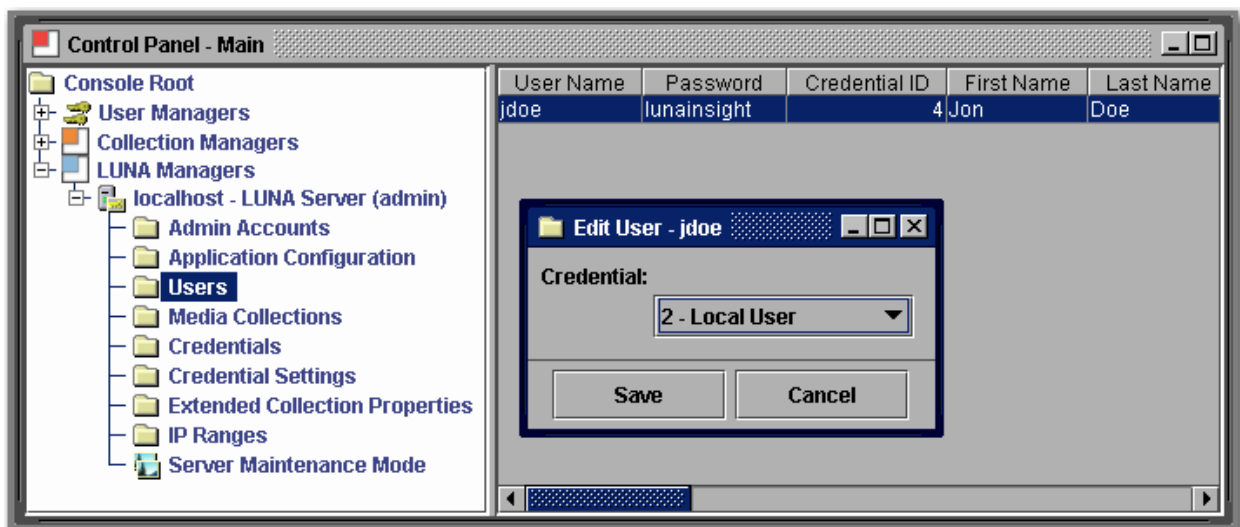
Allow Collection Level Annotation. This grants the user the ability to save an annotation that will be accessible to all users for a specified collection.



Access to LUNA Size 2 (384 pixels on the long side) is automatically assumed.

## User Settings

Each user will be assigned a credential.



Users cannot be added from the Admin Tools. Instead, they will be created through the following:

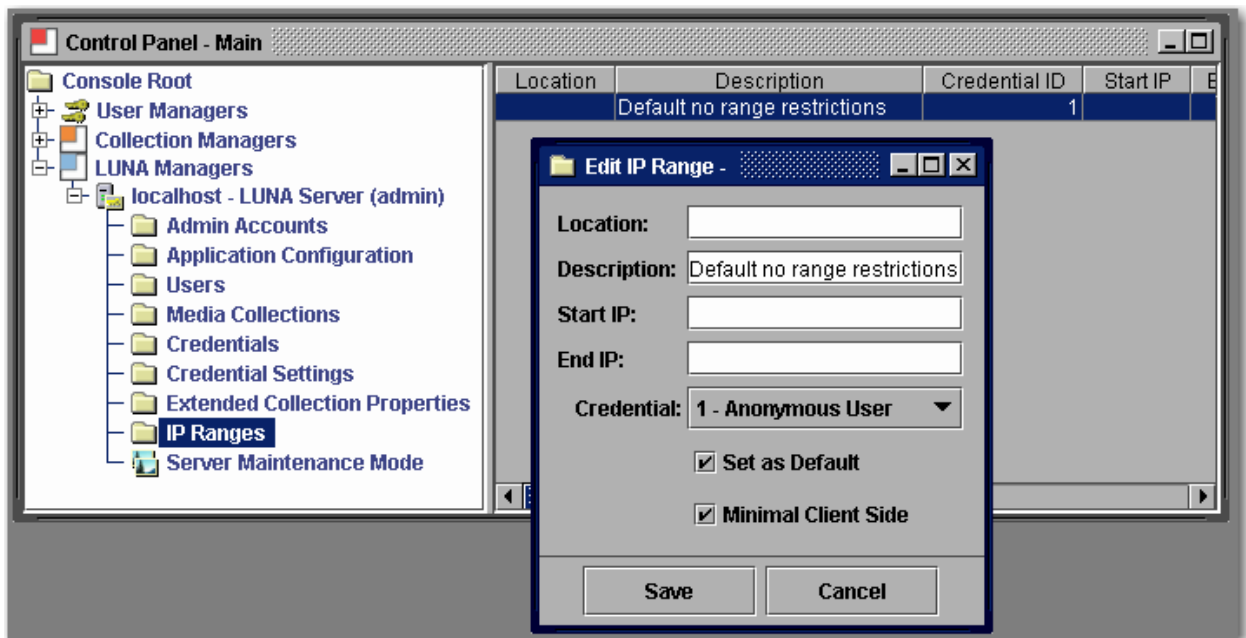
- User Self Registration (passwords will display in Admin Tools)
- Automatically migrated from the Insight User Manager on first login (passwords never copied)
- From Active Directory (passwords never copied)
- From LDAP (passwords never copied)

Each authenticator will add its own user and each user is granted the default Credential. You can reassign a Credential to a user at any time.

If you are using the Insight User Manager to get access to your collections, you will receive access to all collections you had access to in Insight.

## IP Ranges

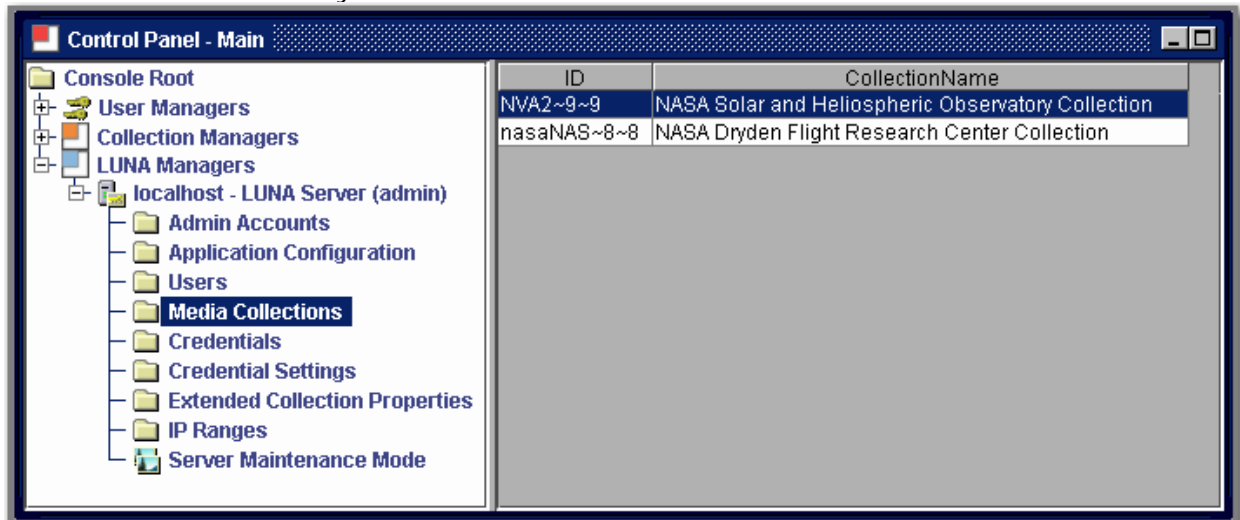
IP Ranges are another way of assigning Credential level privileges. You can set up IP ranges to grant access to specific areas and access to specific content.



Run Maintenance Mode twice to reload your new settings. Also to test make sure you quit all browsers on the tested system then test your access changes

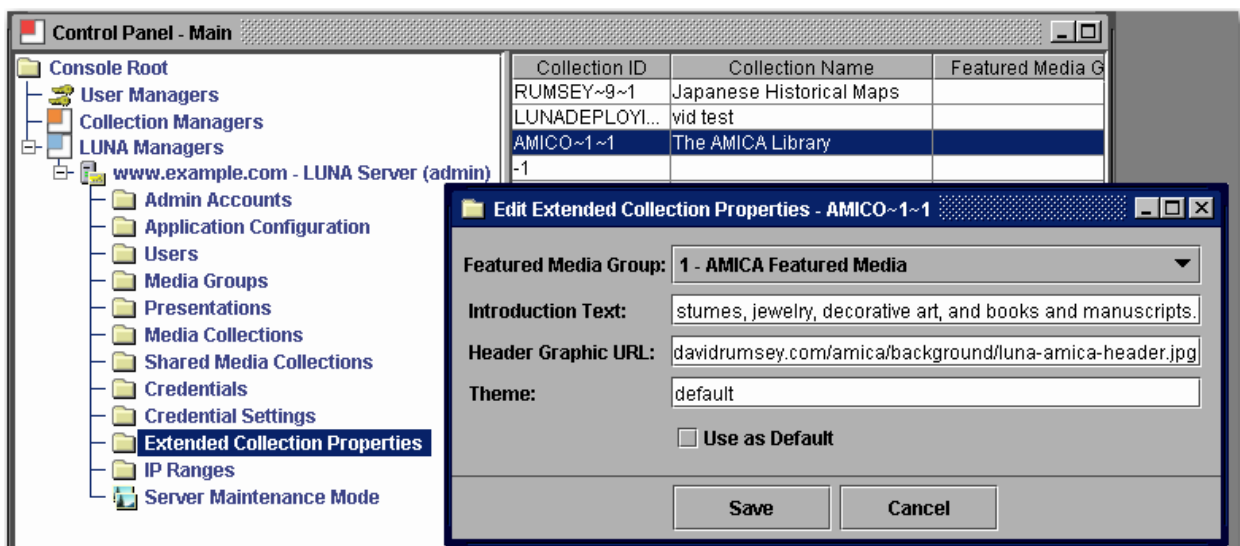
## Media Collections

Media Collections shows you which collections have been added to LUNA.



## Extended Collection Properties

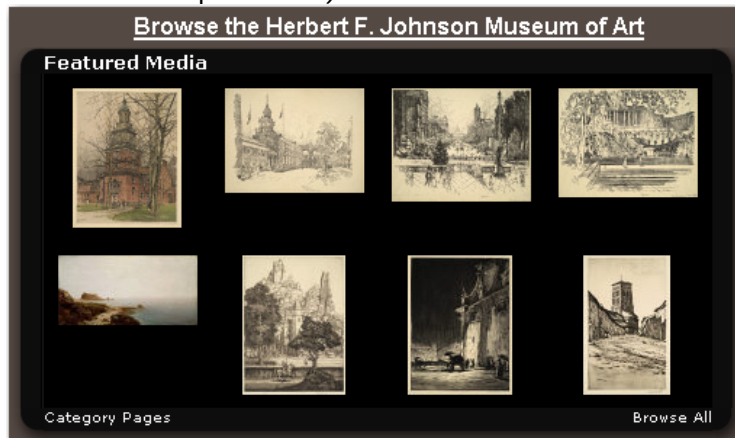
Extended Collection Properties are provided to allow you to make changes your collections.





Extended Collection Properties will allow you to do the following:

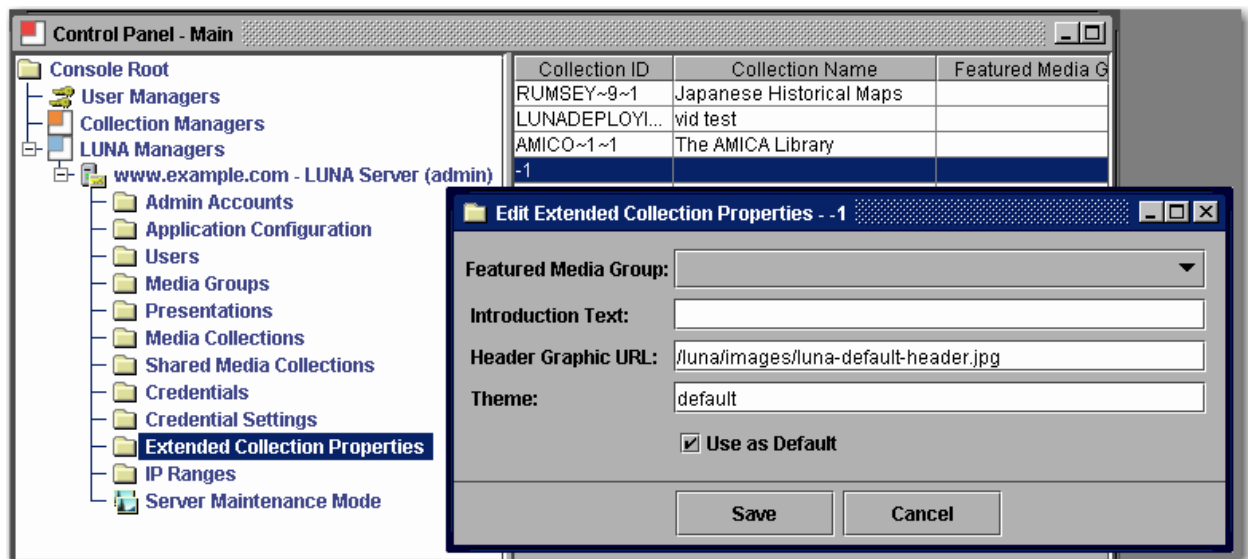
- Set the Media Group that is used for your Featured Media on your Collections Page. This will allow the end user to see a selected set of media for the specified collection.
  - To use this option, first make a Media Group in LUNA then select the group in the drop down menu (Must be public and not password protected).



- Redefine the collection's Introduction Text (this text is automatically pulled from your Insight Collection and may not need to be updated).
- Change the Header Graphic URL. This Graphic must be exactly 754 x 65 pixels and be available from any browser accessing the collection.
- Indicate what theme will be used by your collection. At the time of this release, only "default" is available. In the future other themes that will define the entire color scheme of the application will be available to set. If you would like to participate in defining Themes, please contact Luna's support department [lunasupport@lunaimaging.com](mailto:lunasupport@lunaimaging.com).

## Defaults for Multi Collection Access

Collection ID -1 is the default used for any user accessing more than one collection.

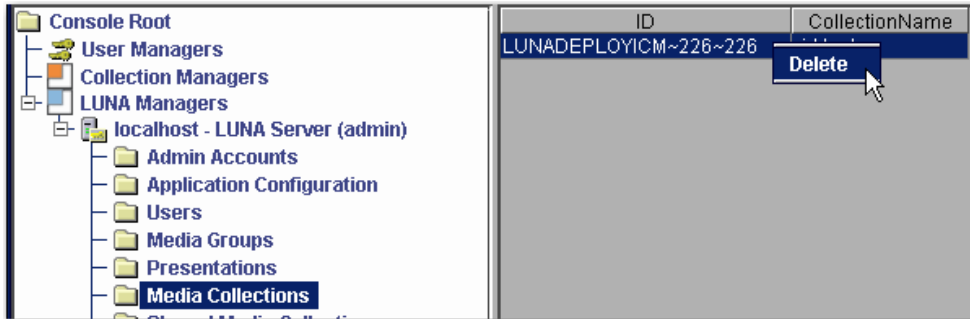


This is a very important graphic and will be used to give identity to your institution. Many times default access will be to more than one collection and you will want to have your institution's identity defined here.

## Deleting a Collection from LUNA

Deleting a Collection from LUNA is done in a few steps.

1. Delete the collection from the Admin Tools.



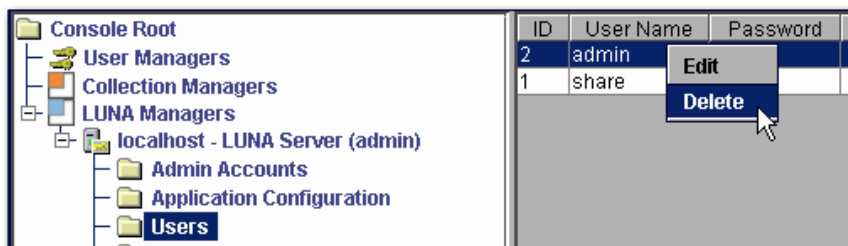
2. Run the [Merge and Load](#) task
  - a. This will remove the content from the search Index.
  - b. Your LUNA system will not work properly unless you do this step.
3. [Restart your Jboss or tomcat server](#)

## Deleting a User from LUNA

Deleting a User from LUNA is done the following way.

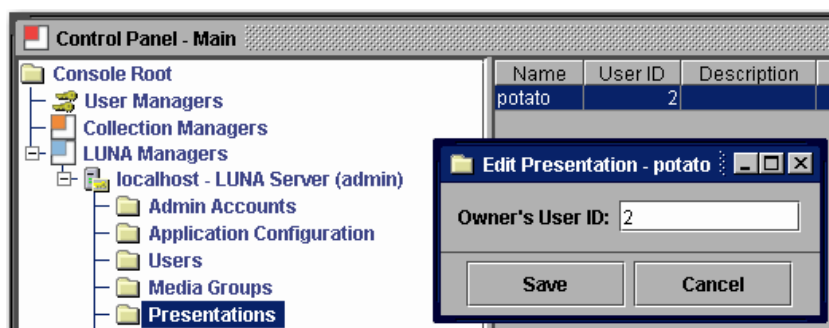
**NOTE:** Before you delete the user, Note the ID associated with that user.

Select the User in the Admin Tools and right click and select delete.



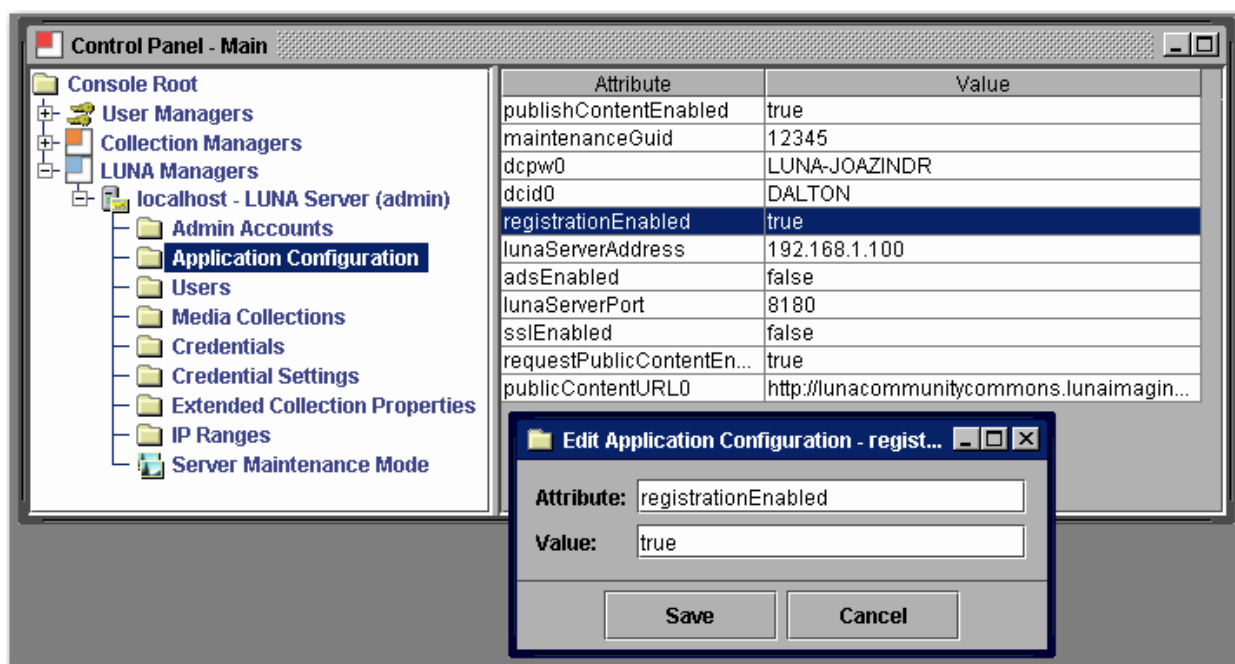
Once you delete the user, All Media Groups and Presentations that the user owned will be orphaned.

Open the Presentation or Media Group folder in the Admin Tools and locate any item that was owned by the User you just deleted and change the ID to another User's ID who you would like to pass ownership to. After you finish, [run the Maintenance Mode](#) twice.



## Application Configuration

Application Configuration allows you to set various characteristics of LUNA.

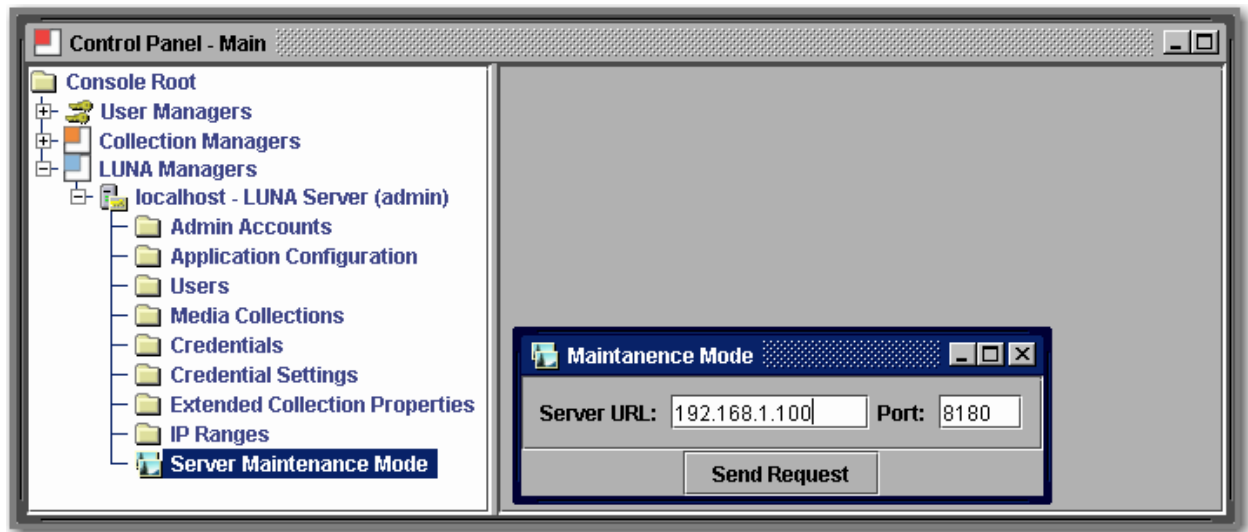


During the installation process these settings were defined. If you need to make modifications to any of these properties, be aware that it will affect how LUNA functions. If you are unsure of what a particular setting is for, do not change it without first contacting Luna support for an explanation of the setting.

Making any change most likely will require the application to be restarted.

## Maintenance Mode

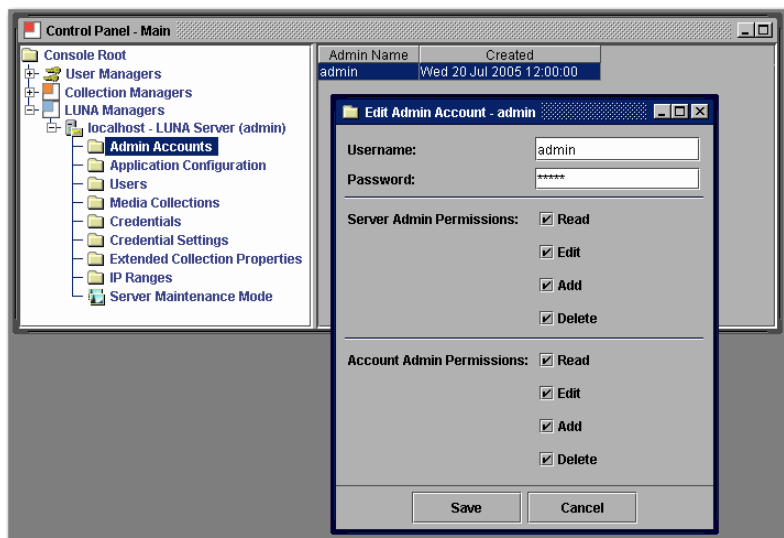
On occasion you will want to put the application into a maintenance mode.



Maintenance Mode can also be used to reload User and Credential Settings. To trigger Maintenance Mode send one request, then send a second to take the system out of Maintenance Mode and reload your settings.

## Admin Accounts

Used to control access to the Admin Tools console.



Like in User Manager and Collection Manager sections of the Administrator Tools, The LUNA Manager also has Admin Accounts. These accounts grant access to the Admin Tools.

Server Admin Permissions grants access to perform actions in the Admin Tools. Account Admin Permissions grants access to create and manage Admin Accounts.

# Virtual Collections in LUNA

---

## Introduction

This section describes how to prepare your system to support Insight Virtual Collections in LUNA.

You will need to update your Insight Collection database by running a script that changes a Primary Key on the IRGROUPS table of your Insight Collection Manager database.

You will then need to use the Administrator Tools (6.0.1+) to prepare the virtual collection for LUNA as described in this section.

Once you have completed this preparation, you can publish your virtual collections the same way you publish other collections to LUNA.

## Updating your Insight Database

**Warning!!!** Before making any database changes, always backup your current database.

The first step is to change the Primary key of the IRGROUPS table in the Insight database that contains your virtual collection.

There are two ways you can do this.

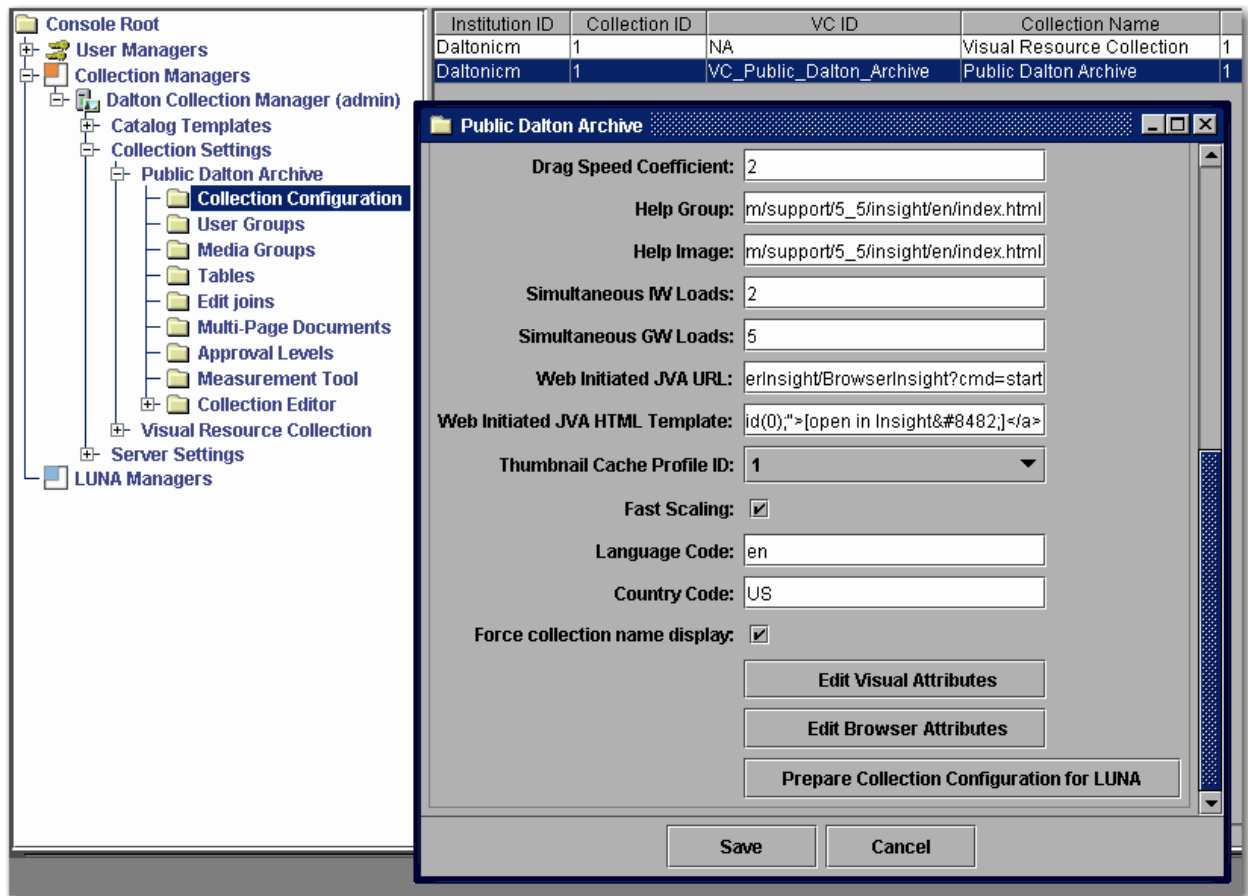
1. If you are familiar with how to change primary keys in your database, you can change the Primary Key on the table IRGROUPS from (GROUPID) to (UNIQUECOLLECTIONID,GROUPID,VCID)
2. Use one of following database scripts links to update your IRGROUPS table
  - For [MySQL](#)
  - For [MSSQL](#)
  - For [Oracle](#)

## Preparing your Virtual Collection with the Administrator Tools

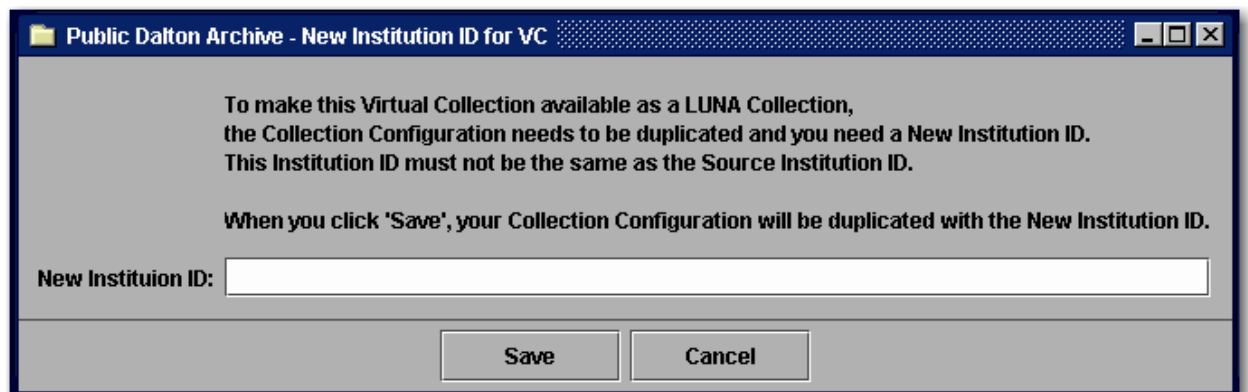
Using your Administrator Tools (6.0.1+) open your collection configuration panel for the Virtual Collection you would like to make available in LUNA. Scroll to the bottom

of the panel. You will see a button that says **“Prepare Collection Configuration for LUNA”**.

Select this button. (This button will only show for virtual collections).



Once you have selected the **Prepare Collection Configuration for LUNA** button, you will need to set a New Institution ID for the collection. Make sure this is different than the Source Institution ID.

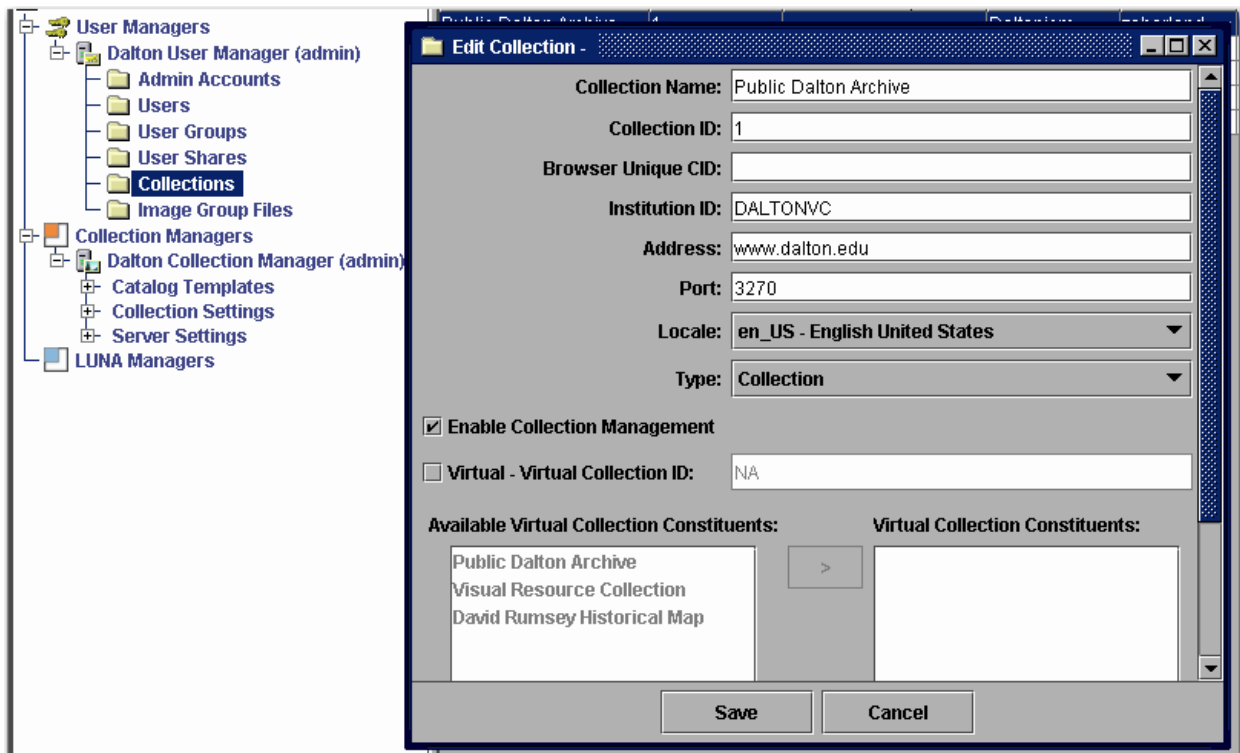


As described in the previous panel, your collection entry will be duplicated and you will now have two entries for your Virtual collection. The original and now the new one with the New Institution ID and the VC ID of NA.

Institution ID	Collection ID	VC ID	Collection Name
Daltonicm	1	NA	Visual Resource Collection
DALTONVC	1	NA	Public Dalton Archive
Daltonicm	1	VC_Public_Dalton_Archive	Public Dalton Archive

Next you will need to add an additional Collection entry to the User Manager to access the Virtual collection in LUNA.

Under the Collections section of the User Manager, create a new entry and fill in Collection Name, Collection ID, your new Institution ID Server Address and port number. Then save your Collection entry.



Next you will need to give a Studio privileged user access to this collection. For instructions on this, follow the "Granting Access to Insight Studio" in the "User's Guide to Basic Collection Building".

Once a user has access to this virtual collection in Studio, they can Publish the collection into LUNA just like any non-virtual collection.



# Adding LUNA and Upgrading Insight 6.2

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## Introduction

With the introduction of LUNA, you have couple of ways to Upgrade.

LUNA is an additional component that can work in conjunction with an existing 5.x Insight system. This means you do not have to do a full upgrade of your current Insight System to use the New LUNA web client.

Option 1: Only upgrade your locale files (language files) on your Insight User Manager and then do a full install of the new LUNA suite to add LUNA to your system. You will also need a new 6.2 Insight Studio client to add your content to the new LUNA system.

[Download the Locale Files](#) unzip them and replace the files on your Insight User Manager, located in <Insight Install Directory>/user\_manager/Locale-Files. You will need to start and stop your User Manager to update these files.

Install LUNA following the instructions in *A Guide to LUNA*

Option 2: Do a full upgrade of your existing Insight server and add LUNA to your system.

### General Insight Upgrade Process:

- 1) Prepare your system.
  - a. Check your system for Java
  - b. Back up your database(recommended)
- 2) Shut down your Insight Server components
- 3) Run the Upgrade Installer
- 4) Start your Insight Server components
- 5) Test

## Preparing your System for the Upgrade

---

Before you run the Upgrade Installer, there are a few tasks you should perform.

### Check your system for Java

Run the following command from a command prompt:  
"java -version" (use a space before the argument). If you get the message "not recognized as an internal or external command" (or something similar), you may only need to add Java to your system path or environment.

Java Setup: Since Java comes bundled with Insight, try pointing your system to your earlier version by adding the full pathname to the Insight 5.1 jre\bin (Windows) or jre/bin (Unix) directory to your system path or system environment, e.g.,  
\\Program Files\LunaImaging\5.x\jre\bin

You may reference another version instead if available. If not, or if you find you have a version earlier than 1.4.2, please upgrade your system with a current version of Java.

## Backing up your Databases

Although this upgrade performs no database adjustments, it is advisable to back up your database. This will ensure that you can safely restore any changes.

## Shutting Down your Insight Server Components

---

Before running the upgrade, you will need to shut down your Insight server components. These include: Collection Manager(s), Personal Collection Manager(s), User Manager and Tomcat (Tomcat controls Browser Insight, the Media Manager and the XMLGateway). This will ensure that no users log in or make any changes during the upgrade process. Once the upgrade is complete, you will need to restart all server components.

## Running the Upgrade Installer

---

The Upgrade Installer is designed to help you locate and upgrade your existing installations, port the current versions into the 5.x structure, and upgrade your configuration files.

## Running the GUI Installer

To run the GUI Installer, double-click on the upgradeInsight executable appropriate to your platform. Please note, the installer is around 120MB, so it may take a few minutes to initially load. The installer is GUI-based and must be run in a graphical environment.

## Running the Command-line Installer

To run the command-line installer, call the upgradeInsight executable with the arguments " -i console" on Windows, Solaris, or Linux (see below). Please note, the installer is around 120MB, so it may take a few minutes to initially load.

```
./upgradeInsight -i console
```

## Choosing Installation Location

The installation of the Insight Server Components can take up to 300MB; please plan accordingly when installing the server components.

## Verify Installation Choices

Once you have completed the configuration of the 6.2 Upgrade Installer, please review your choices before continuing.

## Running Upgrade

The Upgrade Installer will next install and configure the updated Insight 6.2 server components.

## Licensing

Insight v6.2 licensing requires only a single key for all server applications. All existing 5.0/5.1/5.5/5.6 licenses will continue to work for 6.2 Insight systems. If you would like to add a new Personal Insight Server to your system, you may need to request a new all-in-one license key. To register for this purpose online, you can access the form at the following URL.

<http://www.lunaimaging.com/support/register/55.html>

Once you have completed the form and submitted it with your contact information, Luna will contact you with any necessary license key for your product. If you have any questions, please contact [licensing@luna-img.com](mailto:licensing@luna-img.com) or call (800) 452-LUNA.

## Installation Errors

If your Installer encounters any errors during the installation process, you will receive a message in the installer panel. Press the "Done" button to close the Installer, then go to the installation directory to review the installation log (Insight\_Server\_Suite\_Upgrade\_6.2\_InstallLog.log). This log will indicate where a failure may have occurred. If you are unsure about any error reported, please forward the report to Luna Imaging's Support department.

## Adding Support for Source Images and Miscellaneous File Types

---

To enable support for source images and miscellaneous file types, several entries need to be added to the SPS (Storage Path Segment) of your Insight Collection Manager Database(s). This can be done through the Insight Administrator Tools.

1. Open the 6.2 version of the Insight Administrator tools.

2. Connect to your Collection Manager.
3. Open up Server Settings.
4. Highlight SPS.
5. Right click on SPS Data and select NEW.



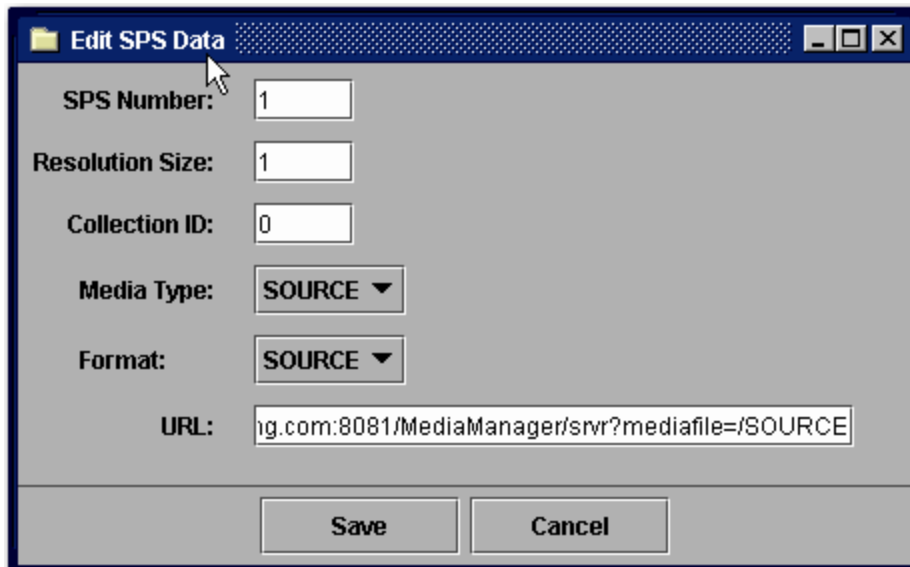
### ***Source Image Support***

For source image support, you will need to add 9 new entries. All nine entries will be the same with exception of the Resolution Size.

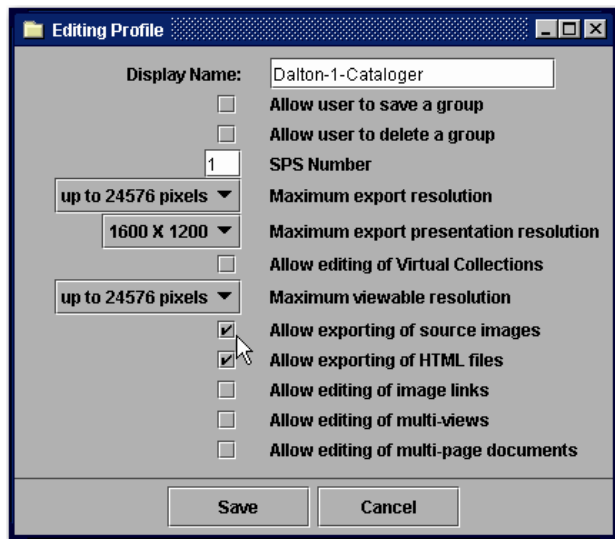
You will need to add an entry for sizes 1-9.

The URL for your entries will all be the same and be formatted like the following with the exception of the Server Address and port number. You can refer to your other collection entries for these values.

`http://insight.lunaimaging.com:8081/MediaManager/svr?mediafile=/SOURCE`



To enable clients to download source files, you will need to update the appropriate profile. Open the profile in the Admin tools and click on "Allow Exporting of Source Images" then save.



### ***Miscellaneous FileType Support***

For miscellaneous file type support, you will need to add three more entries to you SPS references.

All three entries will be the same with exception of the Resolution Size.

You will need to add an entry for sizes 0-2.

The URL for your entries will all be the same and be formatted like the following with the exception of the Server Address and port number. You can refer to your other collection entries for these values.

<http://insight.lunaimaging.com:8081/MediaManager/srvr?mediafile=/MISC>

**Edit SPS Data**

SPS Number:

Resolution Size:

Collection ID:

Media Type:

Format:

URL:

Once these entries have been added, you will be able to load and access miscellaneous file types.

By default only files with the extensions pdf, doc, txt, xml will be able to be uploaded.

If you would like to add other file types, you will need to edit the following property in the InsightStudio.dat, the Insight.dat or the InsightAdminStore.dat. depending on which tool you are processing media in.

```
MiscFileExtensionList = pdf,doc,txt,xml
```

## Insight Administrator Tools Upgrade Note

If you have upgraded your Insight Administrator Tools from a 5.0 or previous 5.1 version, we suggest you verify that the following property exists in the InsightAdminStore.dat file located in the install directory.

HelpFilename = Insight55\_AdminTools.pdf

If not, please add this line or modify it to point to the current help file.

## Deploy Director Updates



DEPLOY DIRECTOR IS NO LONGER SUPPORTED BEYOND 5.6

The Luna Imaging Deploy Director signed certificates may have expired by time this patch is installed. The deploy director application will continue to work but the end user may be prompted by an expired certificate.

You will need to replace 4 files on your Deploy Director server to update the certificate.

Download all four Deploy Director Server files from:

<http://www.lunaimaging.com/support/Restricted/updates.html>

They include: install.cab, install.jar, launch.cab, and launch.jar

Replace the current files located in your <deploy director root>/installer directory with the ones you downloaded.

## Client Installers

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If you perform this upgrade on your Insight server, you must upgrade any Insight Studio clients as well. It is also recommended that you upgrade any Insight Administrator Tools installations. All other clients are forward-compatible and can be upgraded as needed.

**Note:** If you are upgrading and were using the ResampleDuringResizeMode property to eliminate a moiré pattern, you will need to reset the property in the InsightAdminStore.dat (Administrator Tools), InsightStudio.dat (Insight Studio) files after the upgrade has completed.

## Insight Java Client help

---

The URLs to the Insight Java help needs to be updated. You will need to do this for all your collections.

1. Open the Insight Administrator Tools.
2. Login to your Collection Manager.
3. Go to Collection Settings.
4. Open the Collection you would like to update.
5. Select Collection Configuration.
6. Edit Collection Configuration.
7. Update the Help Group and Help Image properties to:  
[http://www.lunaimaging.com/support/5\\_5/insight/en/index.html](http://www.lunaimaging.com/support/5_5/insight/en/index.html)
8. Save and close the Collection Configuration panel.

# Upgrading from Insight 4.x

---

To upgrade to Insight 6.2 from Insight 4.x, you will need the Insight 5.0 CDs as well as the Insight 6.2 CDs.

## General Upgrade Process:

- 1) Complete the upgrade from 4.x to Insight 5.0
  - a. Prepare your system.
    - i. Back up your database.
    - ii. Back up your configuration files.
    - iii. Accept all pending changes in Inscribe.
  - b. Run the Upgrade Scripts to upgrade the database.
    - i. Run the User Manager upgrade script.
    - ii. Update necessary Group Names in both your User Manager and Collection Manager (if necessary).
    - iii. Run the Collection Manager upgrade script.
  - c. Run the Upgrade Installer.
  - d. Run the Insight Indexer in the Insight Administrator Tools.
  - e. Complete the upgrade to the Media Manager.
  - f. Add Master collection entries in the User Manager.
  - g. Grant access to the Collection Manager and/or User Manager for Insight Studio.
  - h. Test.

Complete the upgrade from 5.0 to 6.2

## Installing LUNA

### Introduction

LUNA is an additive component to Insight. You will need to have a working Insight installation and collection(s) to make full use of LUNA.

LUNA can be installed into any of the supported Insight configurations with the exception of Oracle 8. Add the necessary database and ensure you have a minimum of 512MB of free memory, or the recommended 1500MB of free memory, on your server.

There are two major components to LUNA, the LUNA Publisher and LUNA. Each item requires a database. Follow the same guidelines described in the Insight installation to prepare these databases. Both databases will only store user generated information and will not store contents of the collections. This means the storage requirements for these databases are fairly small. 100MB should be plenty of space.



Create two databases. One for LUNA and one for the LUNA Publisher

## Running the Installer

The LUNA installer, like the Insight installer, requires a GUI. If you are installing on Linux or Solaris, you will need X Windows to run the installer or other GUI interface.

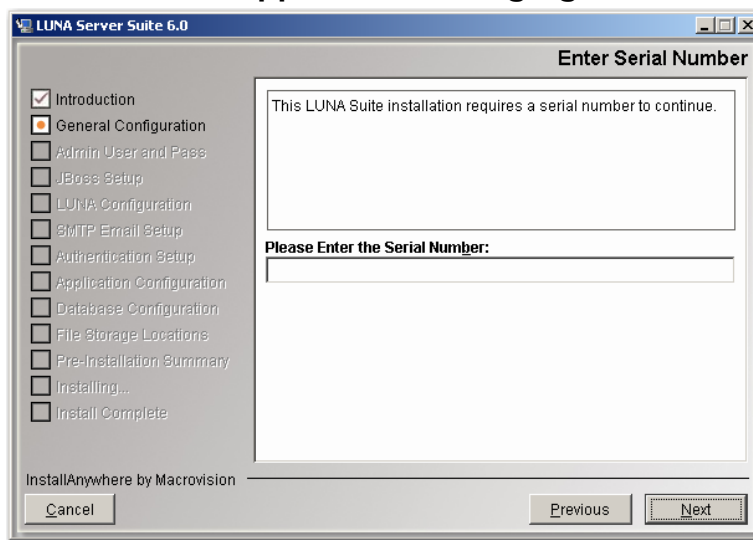


Start the LUNA installer on your system and follow the prompts described in the following section.

## Serial Number

The install requires a Serial Number to continue the installation process.

As a licensed institution, you should have been issued one. If not, contact our support department to obtain a valid licensed Serial Number. [lunasupport@lunaimaging.com](mailto:lunasupport@lunaimaging.com)



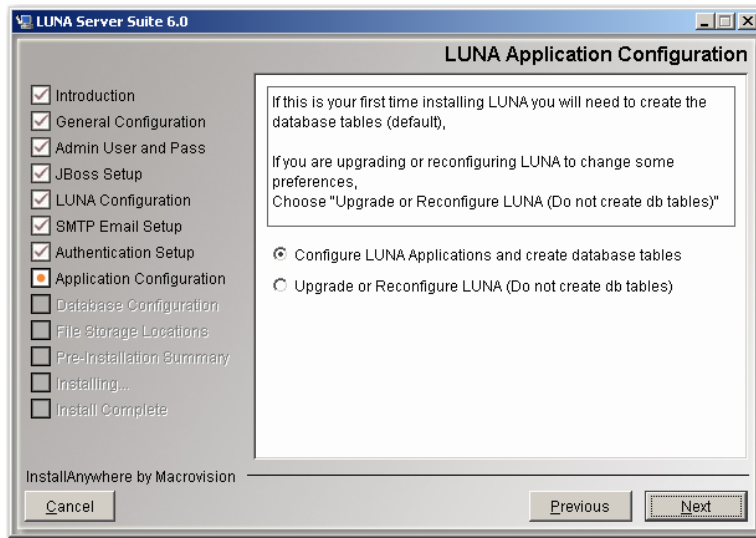
## LUNA Application Configuration

If this is the first time you install LUNA, then you must choose the first option "Configure LUNA Applications and create database tables".

If this is a subsequent installation and you just want to upgrade or reconfigure the LUNA application without deleting any user generated information, then choose "Upgrade or Reconfigure LUNA (Do not create db tables)".

**NOTE: If you are upgrading, Stop Jboss before running the installer**

LUNA and the LUNA Publisher are deployed using Java WAR files. This option will just configure the WAR file and deploy it.



## For Upgrade or Reconfigure Only

Choosing install sets for upgrade

If you have modified your jboss version for any reason, you may need to apply those changes again once the install is complete.

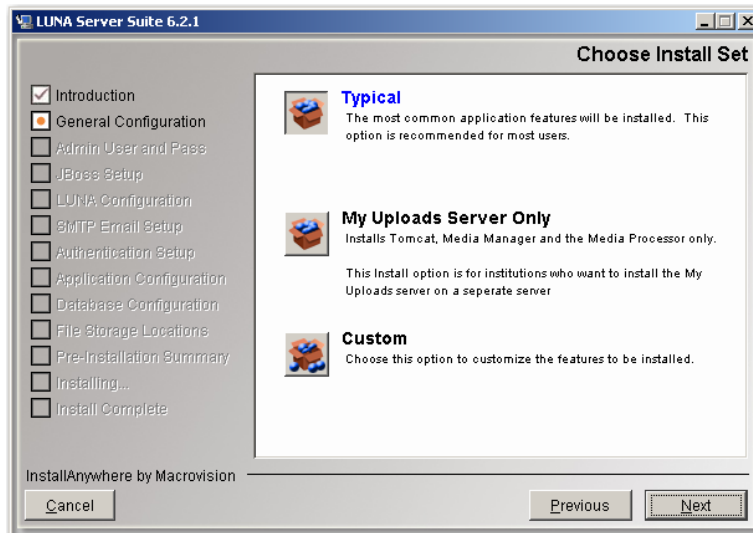
- 
- 
- Choose Install Set
- For the Initial installation, you will generally choose Typical. This will include all system components.
- 
- LUNA
- LUNA Publisher

JBoss

Tomcat (New in 6.2.1)

## Media Manager & Media Processor

Administrator Tools



### My Uploads Server Only

As of version 6.2.1+, LUNA supports uploading of end user's images and content. This feature requires a Media Manager and the Media Processor components.

Since these components place image processing on the server, you may want to separate this activity to another machine depending on the level of use expected.

- If you choose to install the My Uploads Server independently, then you should install this component first. During the install of the LUNA component, you will be asked the server name and port of your My Uploads server.
-

- This will install a Media Manager, Media Processor and Tomcat.
- 
- Custom Install

For subsequent installations, you may wish to choose to install a specific component. You can choose to install any of the following system components.

## LUNA

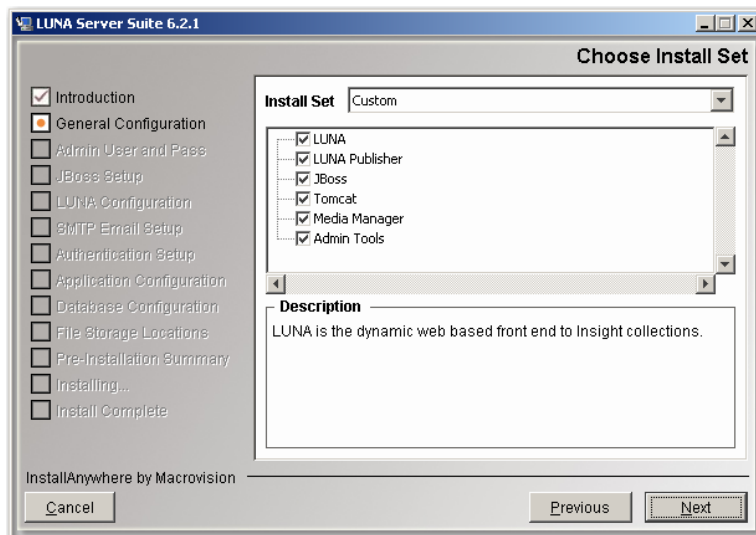
### LUNA Publisher

JBoss

Tomcat (New in 6.2.1)

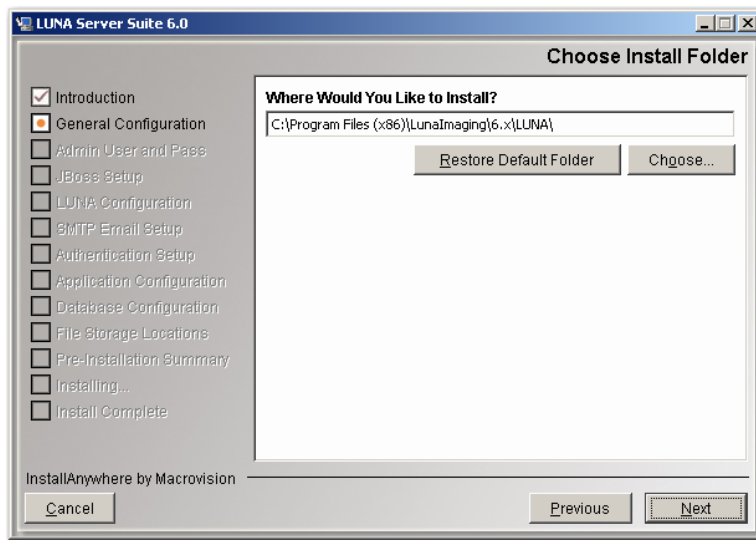
Media Manager & Media Processor

Administrator Tools

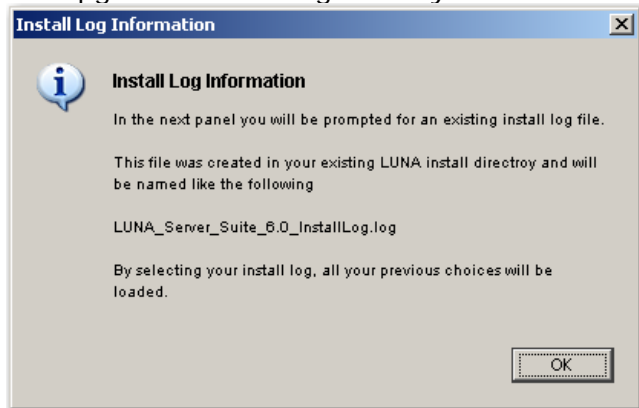


Install Location

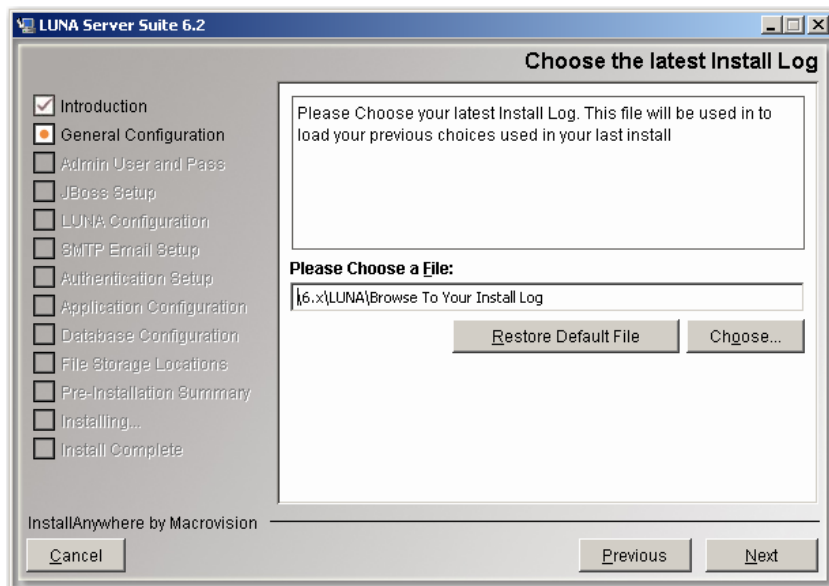
This will be the base of all the LUNA components selected.



## For Upgrade or Reconfigure Only

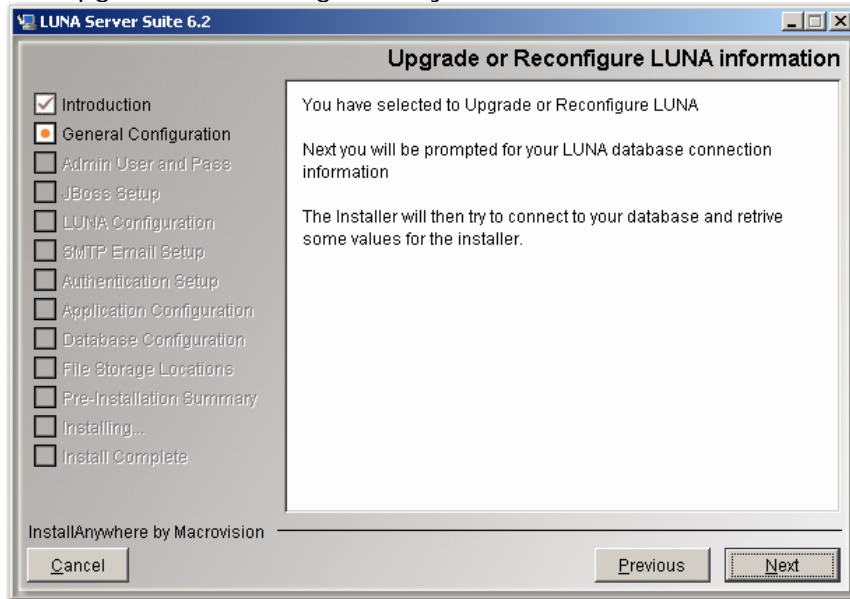


Since you are upgrading, your previous install log can be used to provide the installer with the same choices that you made the last time you installed.

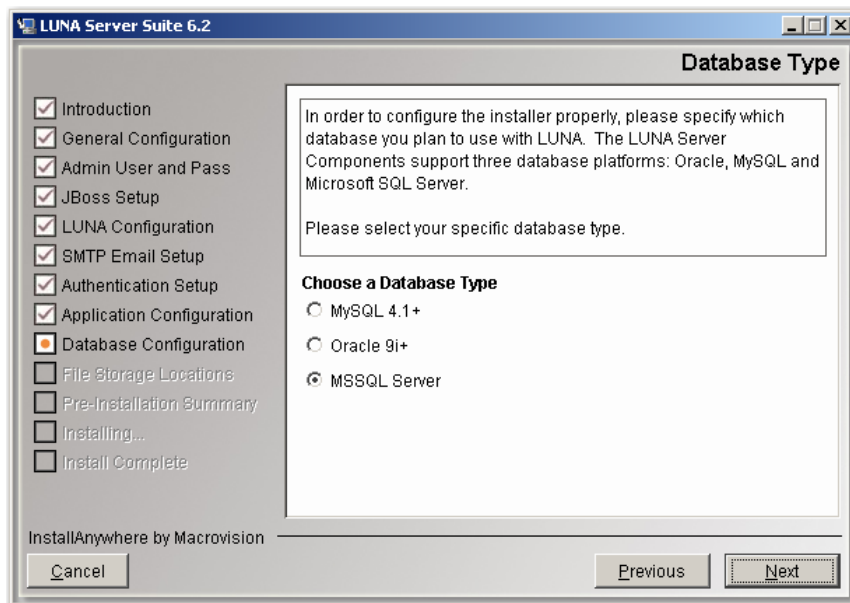


Choose your Install log. This should be located in the root directory of where you installed LUNA. The name should be something like LUNA\_Server\_Suite\_6.0\_installLog.log.

## For Upgrade or Reconfigure Only



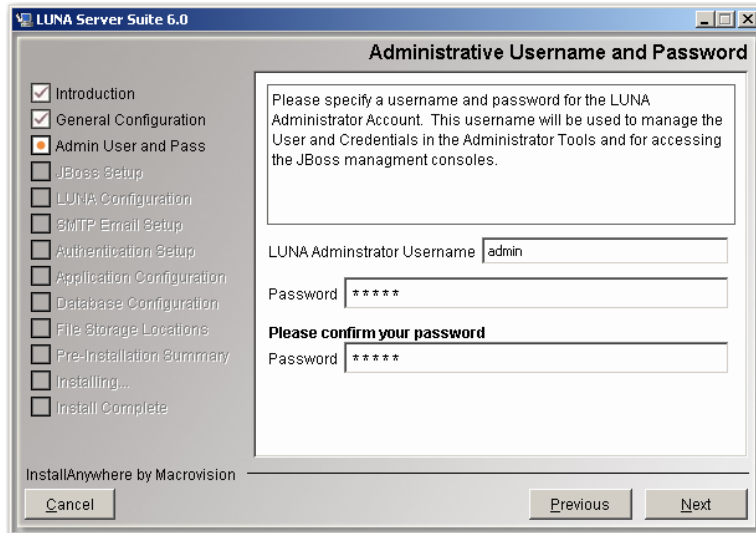
Since you are upgrading, you will now be asked how to connect to your database. Once connected, the installer will read some of your Application Configuration table to assist you in the rest of the upgrade. See [Choosing a Database Type](#) for more information on making choices for this section.



## Specifying an Administrative Username and Password for LUNA

LUNA requires you to specify an administrative username and password. This username and password will be used for authentication within the Administrator Tools and for accessing the JBoss management consoles. Users with this username and password have access to tools that can manage LUNA collection access and Credentials and modify LUNA's configuration, so be careful who it is shared with.

**NOTE:** This password is not encrypted. Do not use your network or system administrator password.

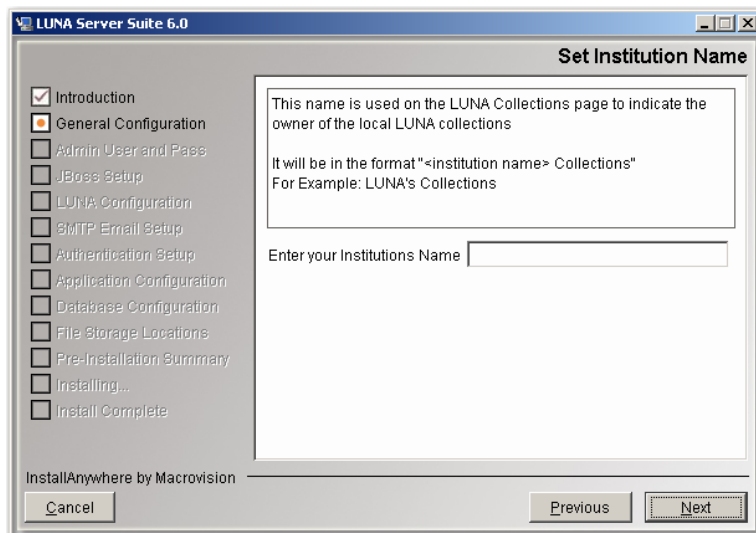


Institution Name

This name is used on the LUNA Collections page to indicate the owner of the local LUNA Collections.

The format is:

<institution name> Collections





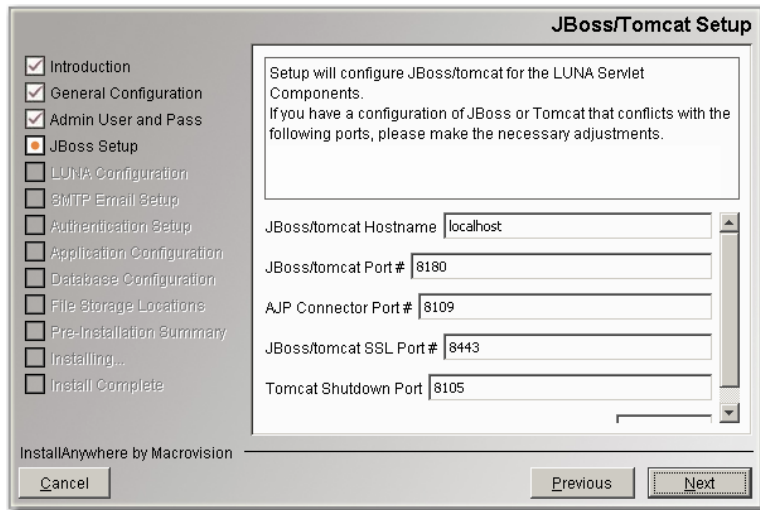
In the example below, it is set to **Luna**.



#### JBoss and Tomcat Setup

The LUNA application and LUNA Publisher are served via JBoss or Tomcat. The installation will take care of all major configurations with JBoss and Tomcat but you may choose to select different ports for the application to run on.

Note: You are also choosing how much memory to allocate to the application. Make sure this much memory is freely available or the server will have out of memory errors.



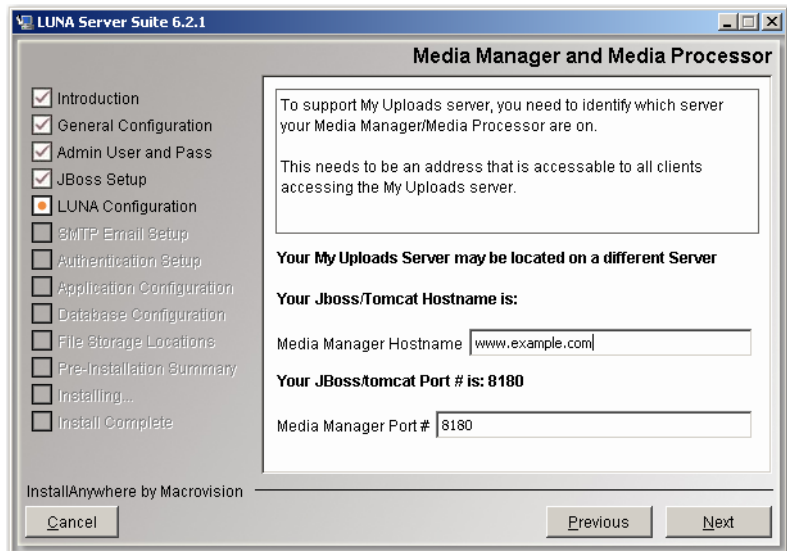
## My Uploads Media Manager and Media Processor

My Uploads allows users to upload image and various other file types from their desktop directly into LUNA.

This address must be available to all end users who will be accessing this feature.

Important! This is not your Insight Media Manager

Typically this will be the same address and port as your LUNA and LUNA Publisher but it can be installed on a different server.



## LUNA Configuration

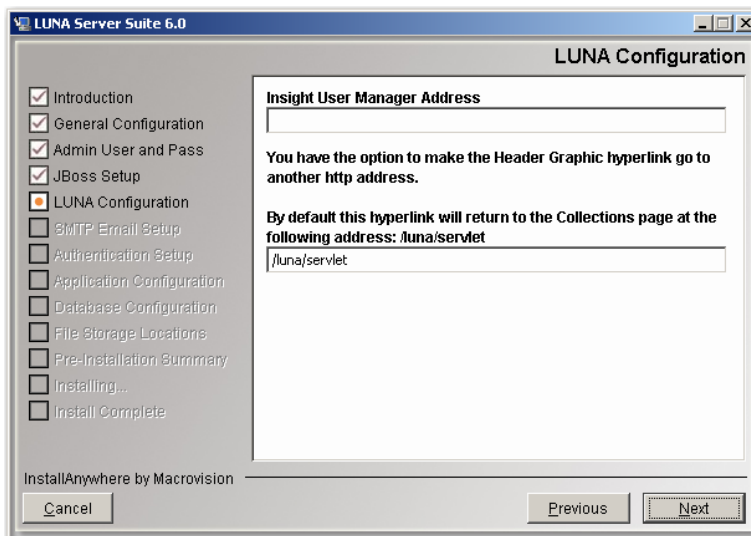
This section allows you to choose how the LUNA application is generally configured. Insight User Manager Address

LUNA can use your existing Insight User Manager to grant access to your collection resources. You do not need to create the accounts. As a user is logged in, the username is passed to the LUNA system (not including the password) and the user is granted access to the same collections that they had access to in Insight.

Header Graphic Hyperlink

**You have the option to make a link in the Header Graphic go to a specific http address. By default the address will return to the LUNA collections Page (/luna/servlet).**

This feature is useful if you want to create a launch page for the LUNA application and from LUNA the user can return to the launch page.



Enable Google ads

If you would like to place ads on the content of your site to generate potential revenue to support your collections, just check the ads box. The ads will be placed on the right side of the application. Go to <http://www.google.com/intl/en/ads/> to sign up for an AdSense account. You will be prompted later in the installation to provide additional information specific to your AdSense account.

Enable End User Registration

LUNA has built in end user self management. If you would like your end users to manage their own accounts (allowing them to create Media Groups, presentations and search External Media), select this item. Later in the configuration you will be asked for your email server information for outgoing messages.

Access LUNA Commons Collections

Selecting this option indicates you want to receive free collections from the LUNA Commons. You will be required to provide additional information later in the installation process.

### Share Select Collections with the LUNA Commons

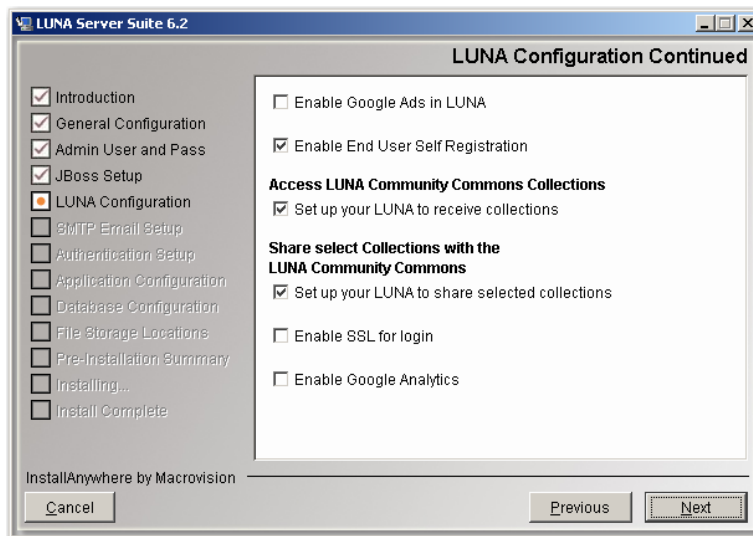
Selecting this option indicates you want to share some of your collections with the LUNA community. You will be required to provide additional information later in the installation process.

### Enable SSL for Login

To prepare your system to support SSL during login, select this item. You will also need to install a certificate to implement the SSL login capabilities.

### Enable Google Analytics

Prepare your system to support Google Analytics. You will also need to have a Google Analytics account to make use of this option. See <http://www.google.com/analytics>



Access LUNA Commons Collections

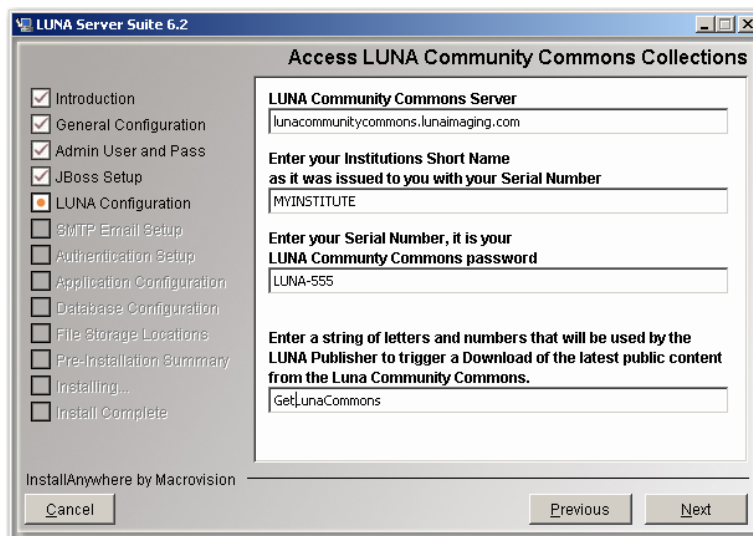
## LUNA Commons Server Address

To access the LUNA Commons, you may need to enter the appropriate Community Commons server address (the default will work unless told otherwise).

Enter your Institution's Short Name and your Serial Number

When you were issued your Serial Number, you were also issued a Short Name for your institution. This Short Name and your Serial Number are your keys to access the LUNA Commons collections.

Enter a string of letters and numbers with no spaces or special characters. This string will be used in the LUNA Publisher to trigger a download of the LUNA Commons content.



## Share Select Collections with the LUNA Commons

With LUNA you can share some of your collections with the larger LUNA Community.

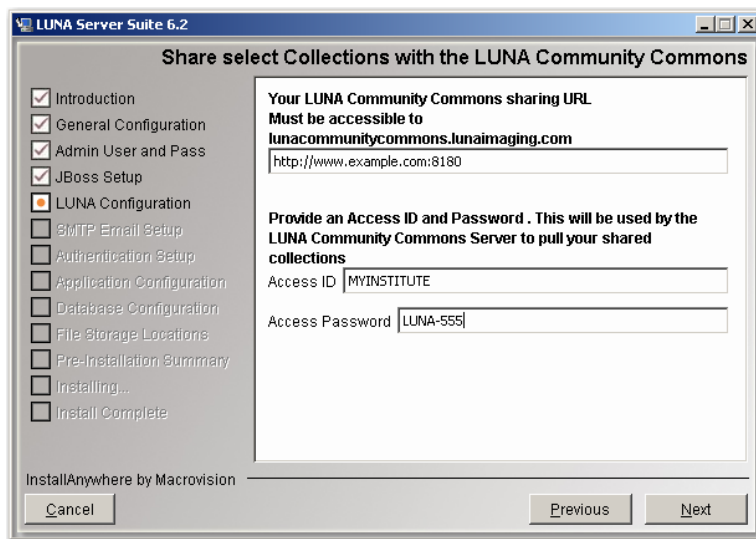
Enter Your LUNA Commons sharing URL.

This is the address to your LUNA server. The LUNA Commons Server will use this address to retrieve the collections you decide to share.

Enter Your Access ID and Access Password

**This will be used by the LUNA Commons server to gain access to your selected LUNA collections.**

By default this has been set to your institution's Short Name and Serial Number.



Create a new LUNA account

This account will be used to define what collections are being shared with the LUNA Community.

**Once you have collections in LUNA, you can use the Admin Tools to assign collections to the Content Distribution Credential.**

Enter a string of letters and numbers with no spaces or special characters. This string will be used in the LUNA Publisher to trigger the creation of your public content that you will share with the LUNA Commons.

LUNA Server Suite 6.2

### Share Collections with the LUNA Community Commons (Continued)

- ☒ Introduction
- ☒ General Configuration
- ☒ Admin User and Pass
- ☒ JBoss Setup
- ☒ LUNA Configuration
- ☐ SMTP Email Setup
- ☐ Authentication Setup
- ☐ Application Configuration
- ☐ Database Configuration
- ☐ File Storage Locations
- ☐ Pre-Installation Summary
- ☐ Installing...
- ☐ Install Complete

To control what collections will be publicly accessible, you need to create a New LUNA Account. This account will be assigned to the Content Distribution credential

New LUNA Username

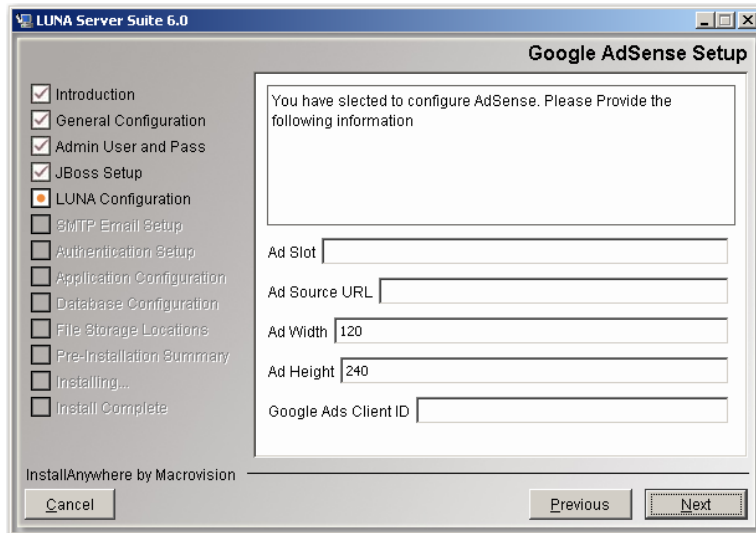
New LUNA Password (max 20)

Enter a string of letters and numbers that will be used by the LUNA Publisher to trigger creation of your public collections for the Luna Community Commons.

InstallAnywhere by Macrovision

## Google AdSense Configuration

If you are seeing this screen, then you have selected to enable Google ads on your site. You will need to provide specific information to enable this feature properly. During your account setup in AdSense, you were provided information appropriate to this feature.



The screenshot shows the 'Google AdSense Setup' window within the 'LUNA Server Suite 6.0' application. On the left, a list of configuration steps is shown with checkboxes: Introduction (checked), General Configuration (checked), Admin User and Pass (checked), JBoss Setup (checked), LUNA Configuration (checked), SMTP Email Setup (unchecked), Authentication Setup (unchecked), Application Configuration (unchecked), Database Configuration (unchecked), File Storage Locations (unchecked), Pre-Installation Summary (unchecked), Installing... (unchecked), and Install Complete (unchecked). The main area contains a message: 'You have selected to configure AdSense. Please Provide the following information'. Below this are four input fields: 'Ad Slot' (empty), 'Ad Source URL' (empty), 'Ad Width' (containing '120'), and 'Ad Height' (containing '240'). At the bottom of the main area is a 'Google Ads Client ID' field (empty). At the bottom of the window are three buttons: 'Cancel', 'Previous', and 'Next'. The text 'InstallAnywhere by Macrovision' is visible at the bottom left of the window frame.

SMTP Mail Server Setup

**If you selected end user registration, then fill in the following form.**

**Your email domain address**

**SMTP Port Number**

**SMTP User (optional)**

**SMTP Password (optional)**

Senders email account (the account end users will respond to if necessary)



LUNA Server Suite 6.0

### SMTP Email Setup

☒ Introduction  
☒ General Configuration  
☒ Admin User and Pass  
☒ JBoss Setup  
☒ LUNA Configuration  
☒ SMTP Email Setup  
☐ Authentication Setup  
☐ Application Configuration  
☐ Database Configuration  
☐ File Storage Locations  
☐ Pre-Installation Summary  
☐ Installing...  
☐ Install Complete

You have selected to allow End User self registration.

To allow the end users to manage their accounts, you will need to provide your SMTP information.

SMTP Hostname

SMTP Port

SMTP User

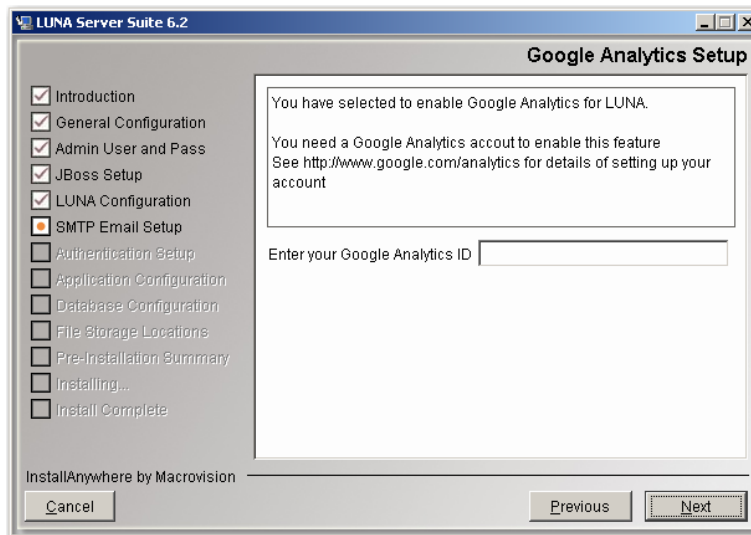
SMTP Password

Senders Email account

InstallAnywhere by Macrovision

## Google Analytics Setup

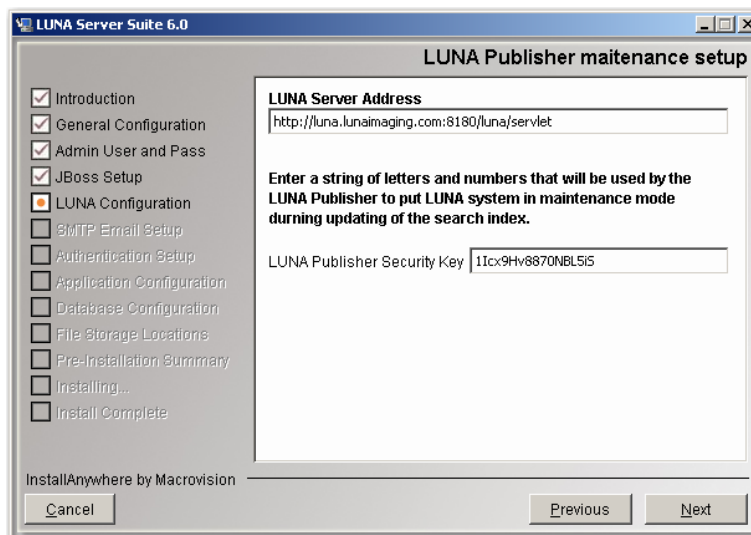
If you selected Google Analytics, you will need to enter your Analytics ID here.



## LUNA Publisher Maintenance Setup

**The information supplied in this panel is used when LUNA needs to be placed into a maintenance mode so that you can perform server adjustments or when the LUNA Publisher needs to replace the Lucene index with an updated version.**

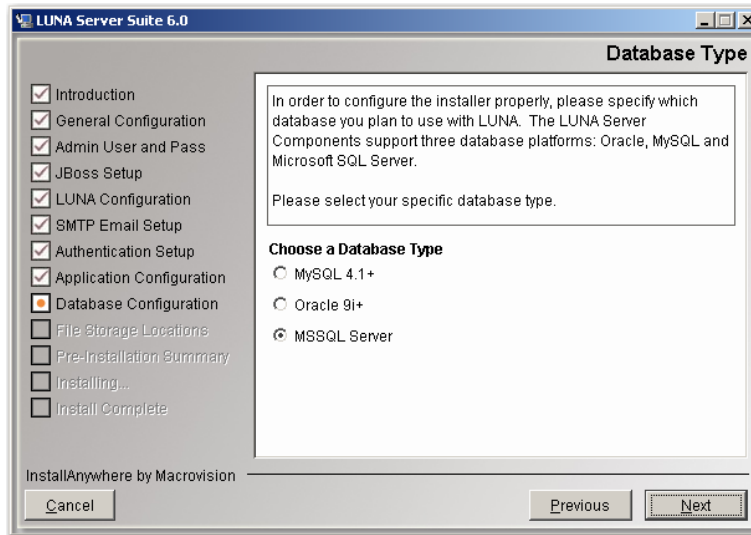
The maintenance mode is invoked via a URL with a security key. We suggest making the security key obscure by using only web friendly characters and letters.



NOTE: If you are **Upgrading or Reconfiguring**, then skip to LUNA Graphics URL

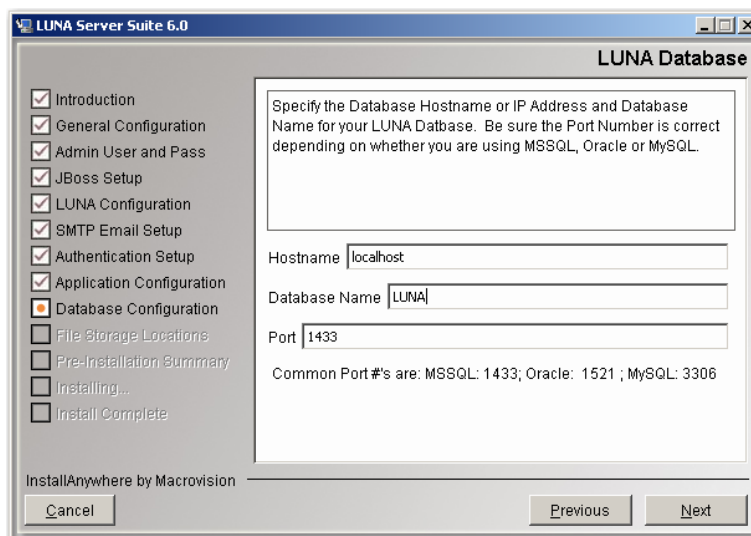
### Choosing a Database Type

The installer is designed to connect to your database server and to create database tables, fields and indexes for your LUNA Server and LUNA Publisher. Please choose the database type you wish to use. The information you identify here will be used to configure LUNA.



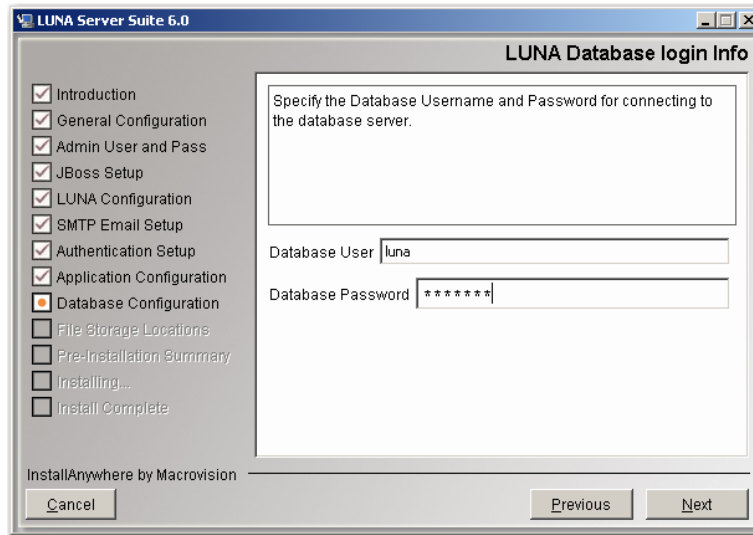
### LUNA Database Information

**Provide the information necessary to connect to your database, including the hostname, database name (SID Name if you're using Oracle), and database port. The installer will offer default values based on information provided earlier. Review the defaults (and change them as needed).**



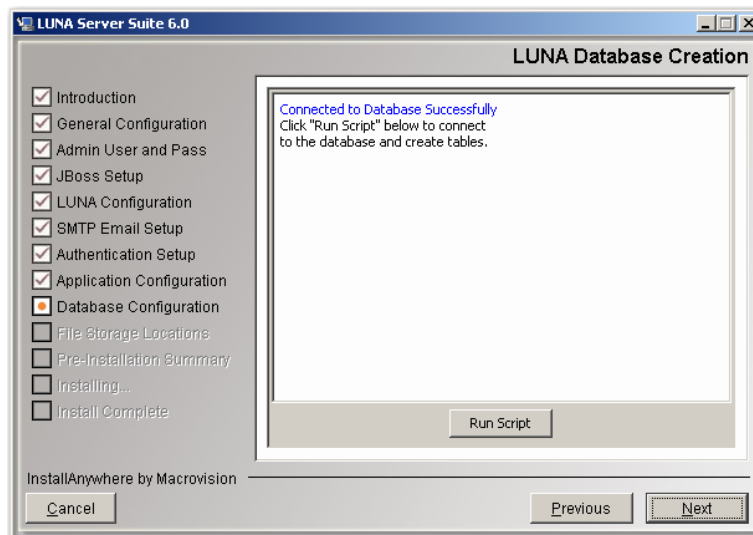
### Database Username and Password

Please specify the username and password for your database. This is the username and password that LUNA should use to connect to the database.



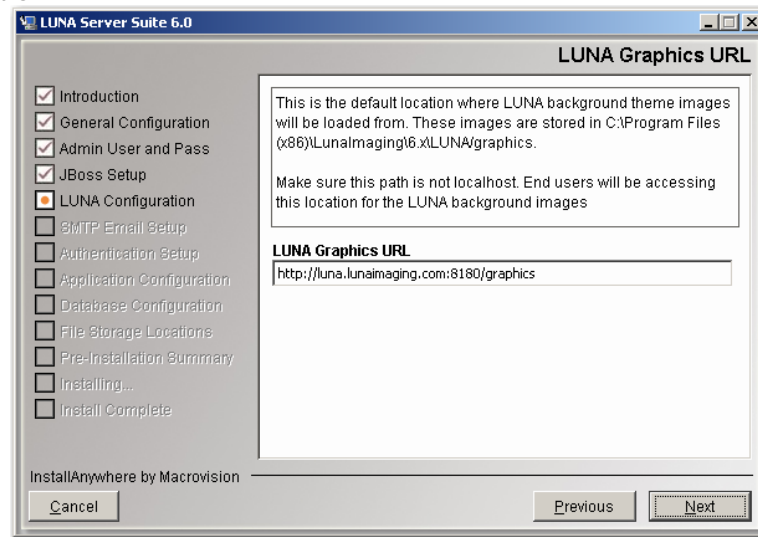
- 5.
- 6.
7. WARNING: the installer will DROP ALL LUNA **TABLES** once it has connected, so be sure that you are not installing over an existing version of LUNA. (The installer will warn you again before it actually drops any tables.)
  - 
  - Creating the LUNA Database
  - Once the installer has tested the connection, it will present you with the database creation script window. Click "Run Script" to create the LUNA tables and indexes.

8.

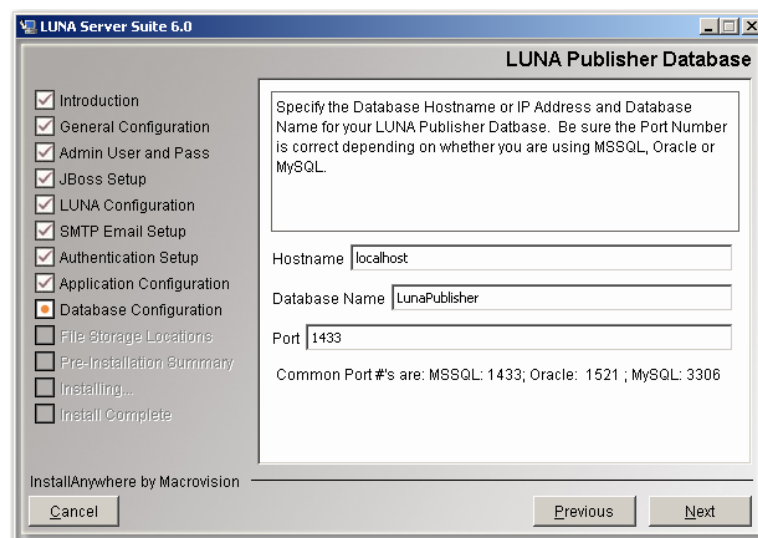


- 9.
- 10.
- 11.
12. LUNA Graphics URL
13. The LUNA Graphics URL is used to access LUNA theme header graphics. Just make sure this URL is externally accessible from the

installed machine. Do not use localhost or any other internal domain unless you know for sure the content will not be used outside of your institution.

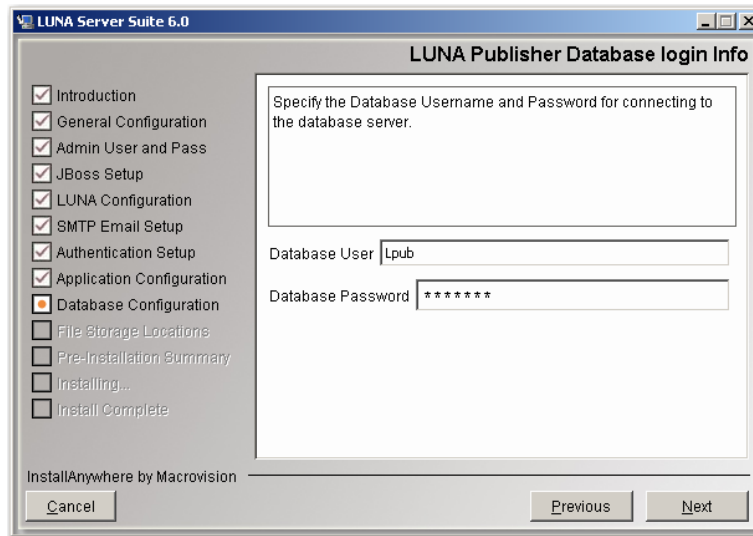


- 
- 
- 
- 
- LUNA Publisher Database Information
- Provide the information necessary to connect to your database, including the hostname, database name (SID Name if you're using Oracle), and database port. The installer will offer default values based on information provided earlier. Review the defaults (and change them as needed).
- 



- 
- Database Username and Password
- Please specify the username and password for your database. This is the username and password that LUNA Publisher should use to connect to the database.

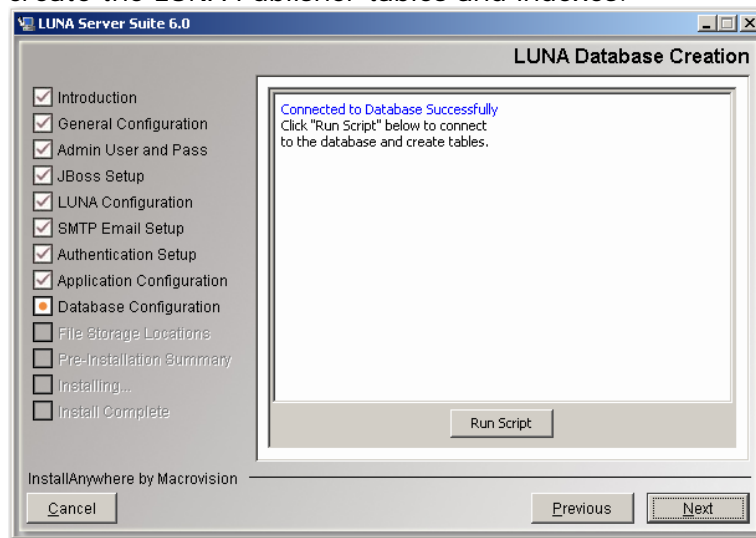
14.



15.

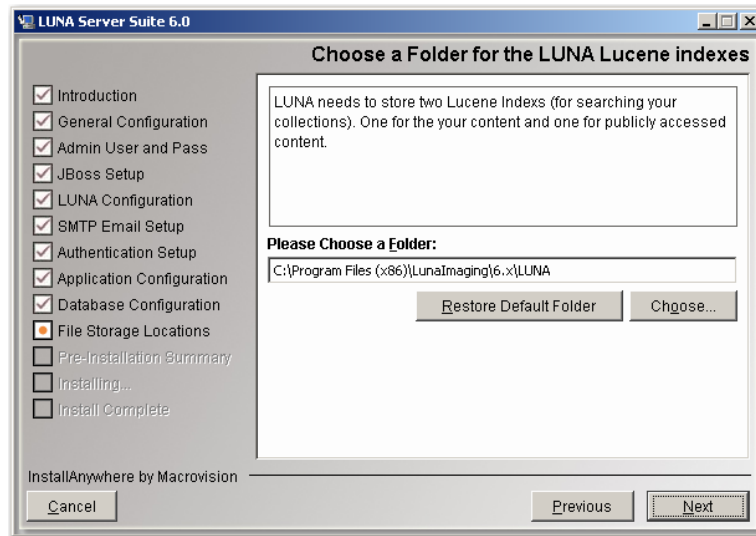
16. WARNING: the installer will **DROP ALL LUNA Publisher TABLES** once it has connected, so be sure that you are not installing over an existing version of LUNA Publisher. (The installer will warn you again before it actually drops any tables.)

- Creating the LUNA Publisher Database
- Once the installer has tested the connection, it will present you with the database creation script window. Click "Run Script" to create the LUNA Publisher tables and indexes.



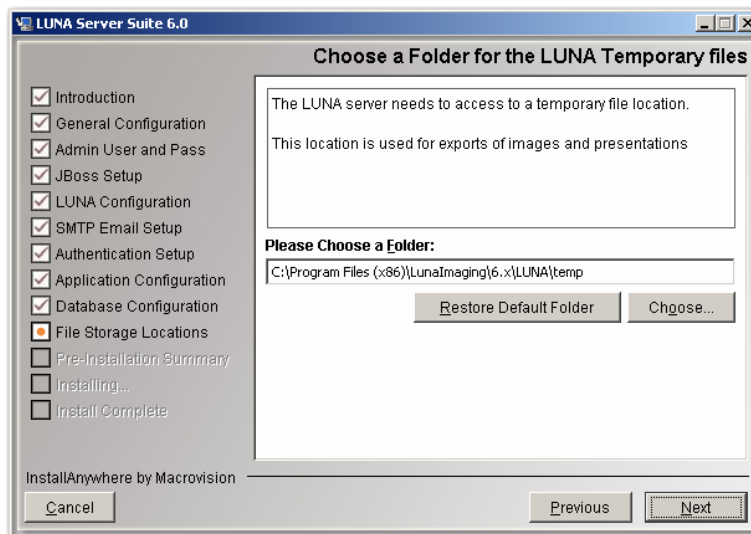
- 
- 

- Lucene Index Folders
- LUNA uses Lucene to search for content in your collections. These indexes can add up to hundreds of megabytes depending on the content you have in your collections. 160,000 objects takes about 400MB but this is entirely dependent on the size of your collections that you are accessing. So choose an appropriate location that can grow with your collections.



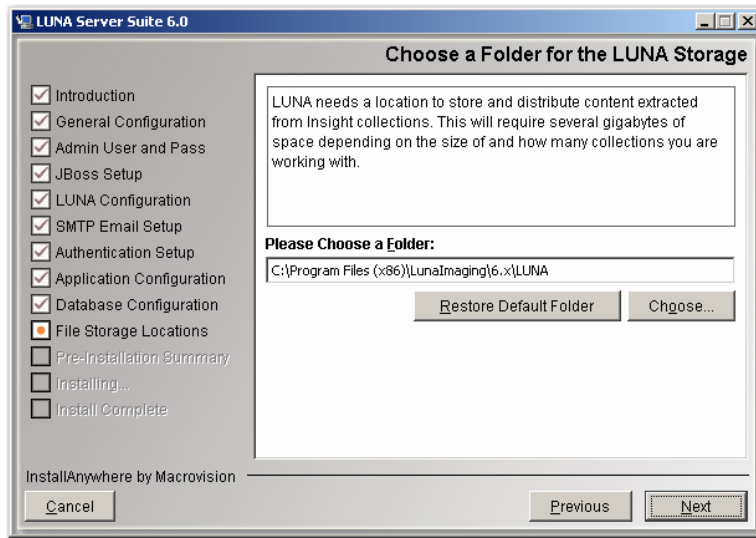
## LUNA Temp Files Location

During the use of LUNA, content is exported and this location is used to store that information temporarily.



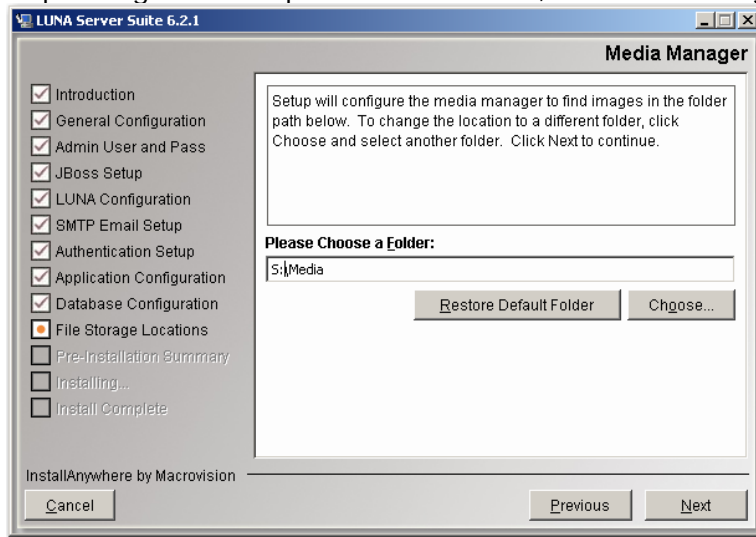
## LUNA Storage

LUNA and the LUNA Publisher need space to store information extracted from Insight collections and a place to create the Lucene indexes during the publishing process. LUNA also uses this area for content distribution with the LUNA Commons Server. This area can easily grow to several gigabytes.



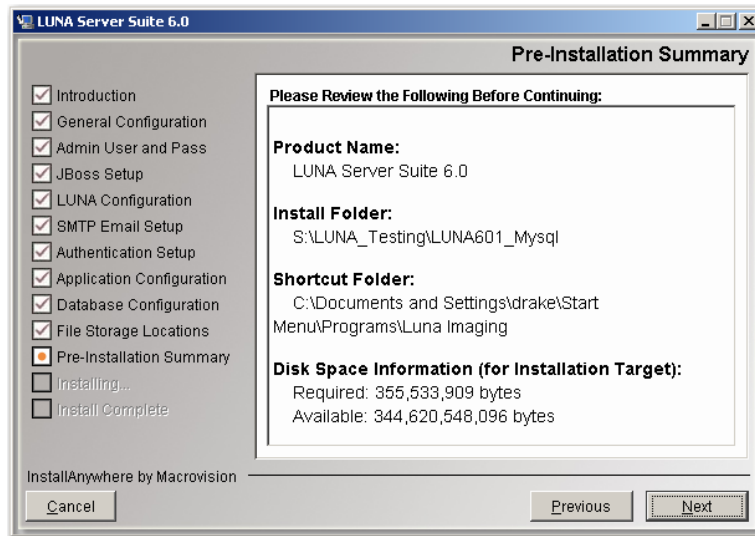
## Media Manager for My Uploads Storage Location

The My Uploads server needs a location to store the content that is uploaded to it. Depending on the expected level of use, choose a storage location.



- Start the Install Process
- This may take several minutes depending on the server speed and how you are accessing the installer.
- 
-





- 
- 
- Before Installing LUNA and the LUNA Publisher you will see this **IMPORTANT** message.



- 
- 
- **\*\*\*\*IMPORTANT NOTE for users of LDAP configurations\*\*\*\***
- The Installer will now backup any existing LUNA and LUNA Publisher configurations. This backup will be placed in <USER INSTALL DIR>/luna\_backups

**With** any upgrade, you should perform your own backups of the file system and databases before installing any new version.

## **IMPORTANT LDAP AUTHENTICATION INFORMATION**

**Any manual configuration** of LUNA will not be retained and you will need to reapply any configurations once the install is complete.

This relates to any LDAP modifications to the applicationContext file.

Your existing LUNA and LUNA Publisher will be backed up to the luna\_backups in your install directory within a dated zip file.

### Starting LUNA and the LUNA Publisher

You can start these two servers by starting the Tomcat or the JBoss server.

Go to:

<Install Directory>/tomcat/bin

or

<Install Directory>/jboss/bin

For Tomcat:

We have also supplied you with our standard java service wrapper version for starting and stopping the application:

start\_jboss.bat on windows and start\_tomcat.sh for Linux and Solaris will start tomcat in a console mode.

If you would like to start tomcat as a service on windows, we have supplied you with the install\_as\_service.bat file.

**If you want to run jboss in the background using the java service wrapper on Linux or Solaris, you can start it with:**

./tomcat\_service.sh start

The script has the following options:

console | start | stop | restart | status

For Jboss:

You can use the standard jboss supplied run scripts run.bat or on Linux and Solaris you can start the servers by executing the run.sh script. If you want to run this in the background we suggest running:  
nohup ./run.sh &

**We have also supplied you with our standard java service wrapper version for starting and stopping the application:**

start\_jboss.bat on windows and start\_jboss.sh for Linux and Solaris will start jboss in a console mode.

If you would like to start jboss as a service on windows, we have supplied you with the install\_as\_service.bat file.

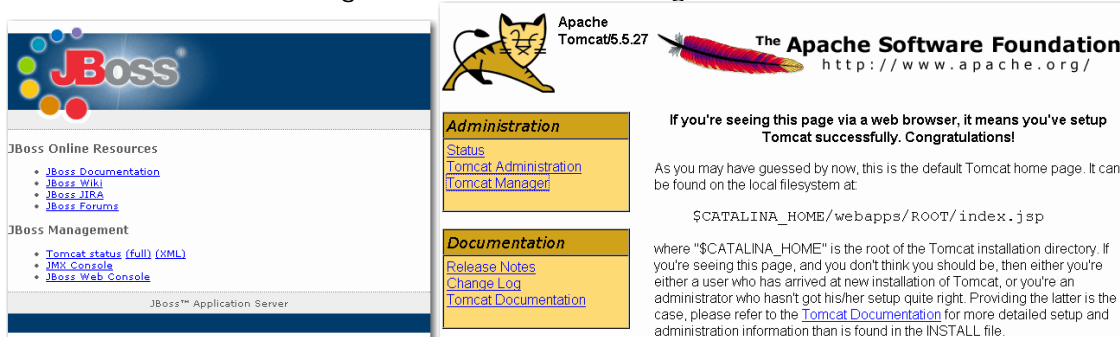
If you want to run jboss in the background using the java service wrapper on Linux or Solaris, you can start it with:  
./jboss\_service.sh start

The script has the following options:

**console | start | stop | restart | status**

Once started go to <http://www.example.edu:8180/>

You should see something like one of the following:



The LUNA application will now be available at <http://www.example.edu:8180/luna/servlet> and it will look similar to the following page:





My Uploads Server testing



## Testing the Media Manager



In your browser, go to <http://localhost:8180/MediaManager/srvr>



You should get a message like the following:



### HTTP Status 404 - Requested media not found.

**type** Status report

**message** Requested media not found.

**description** The requested resource (Requested media not found.) is not available.

Apache Tomcat/5.5.27



Testing the JPEG2000 Decoder



<http://localhost:8180/MediaManager/jp2ktest>



You should get a page like the following:





**If you see any errors, see the** Testing the JPEG2000 Decoder & the Media Manager **in the Install and Configuration Guide.**

#### Adding Insight Content to LUNA Introduction

It's fairly easy to add Insight content to LUNA but first you should know what LUNA is and what it is not.

LUNA is a search interface and a place to work with media content. LUNA is not the repository of the content. LUNA allows the end user to select, organize and make use of various image and media content.

Currently, in version 6.2.1, LUNA supports three kinds of source content. You can access and use Insight content and you can access and use content from Flickr and content from your own desktop using the My Uploads feature.

**Insight Studio is used to prepare content for LUNA using the LUNA Publisher and the LUNA theme header graphic creator. These tools are available from the Insight Studio Task Menu.**



Note: The preferred method to upload a Header Graphic is now located in the LUNA Publisher NOT Insight Studio. See section on the LUNA Theme Header Graphic

Note: You do not need to upgrade your Insight Collection Managers to work with LUNA. LUNA will work with all 5.x Insight Collection Managers.

**The only suggested adjustment you need to make is to update the language bundles on the Insight User Manager. This will ensure that you see the correct text labels while using the 6.2.1 Insight Studio tool.**

## The LUNA Publisher

**So what does it mean to add content to LUNA? Well it's pretty simple; it means extracting all descriptive data from Insight and placing it into an index that LUNA uses to search. It also sets up and provides LUNA with information to connect to the Insight collection.**

The LUNA Publisher is the tool you use to do the following:

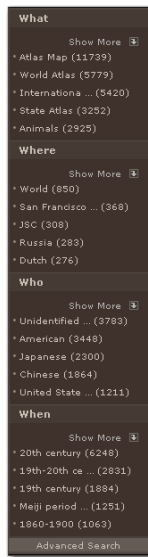
Schedule when and how often the LUNA collection index is updated from the Insight Collection.

Setup LUNA specific characteristics

Choose Media Summary fields (provides additional roll-over information).



Choose the Who, What, When, Where fields used for filtering search results.



Identify the URL to the LUNA header graphic.

**Using the Merge and Load Task, all individual collection indexes are merged into a single index and then loaded into the live LUNA system.**

#### LUNA Theme Header Graphic

The LUNA theme header graphic is the background that shows up at the top of the LUNA interface and can be different for each collection. This is used to provide collection identity.

The graphic needs to be 754 x 65 and should fit the theme being used by fading to a solid color on the right of the graphic (R=133, G=124, B=117 or the hex is #857C75).

David Rumsey Map Collection  
CARTOGRAPHY ASSOCIATES

Welcome null | [Login](#) | [Register](#)

**Search LUNA**

 [Search](#)

[Home](#) [Explore](#) [Create](#) [Share This](#) [Embed This](#) [Help](#)

[Advanced Search](#)

!

!

!

!

!

To upload **your Header Graphic**, locate the Header Graphic section of your LUNA Publisher.

!

Click "Select header graphic".



Schedule TaskSchedule URL RequestTask ListTask Log

Collection Properties

Collection Name:

vid test

Task Description:

Theme:

default ▾

[Select header graphic](#)

Status: 

[Upload File](#)

Header Graphic URL:

http://www.example.com:8180/graphics/luna-

▾

Preview

!

!

!

! Next, click "Upload File". You will then be presented with a confirmation dialog box.

!

Confirmation

If you click OK your Header Graphic will get uploaded and any changes you just made to this form will be lost.

If you do not want to lose your changes click Cancel and select Save Task. Then return to this task and upload your Header Graphic.

The uploaded file will be renamed to luna-LUNADEPLOYICM-226-NA.jpg

OK

Cancel

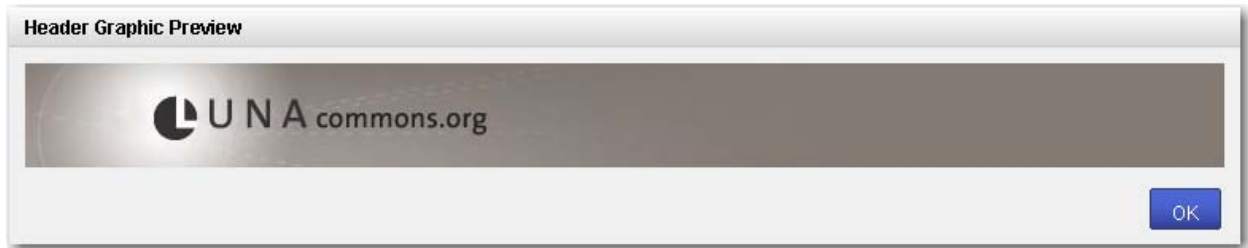
!

!

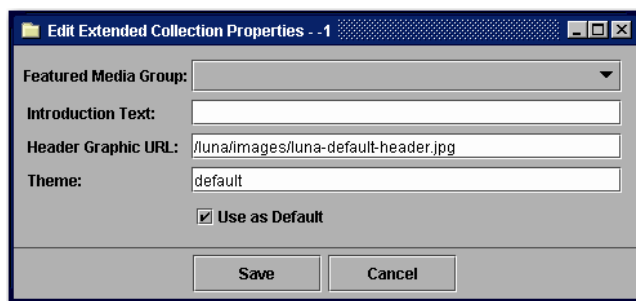
!

! You can also Preview the graphic once it is uploaded.

141



To setup a LUNA header graphic that will be used when more than one collection is being accessed, edit the Extended Collection Properties for the “-1” Collection ID.



The default is set to /luna/images/luna-default-header.jpg

Note: This path refers to an image stored within the LUNA software. This is used as the default location.



## Let's Get Started

### Prerequisites

You need the following to proceed:

LUNA and the LUNA Publisher need to be installed and running.

6.x version of Insight Studio configured with access to the LUNA Publisher.

At a minimum, the language bundles on the Insight User Manager need to be updated.

Insight Studio access to the collections you will be adding to LUNA.

Inscribe access to the collection(s) you will be publishing.

Note: The LUNA Publisher pulls the descriptive metadata and media information from a form of Inscribe. In certain collections that were created prior to 5.x, this content may not be properly accessible. If you do not see the correct images or data in the Inscribe tool, contact Luna's support department for assistance in preparing your collection for LUNA.

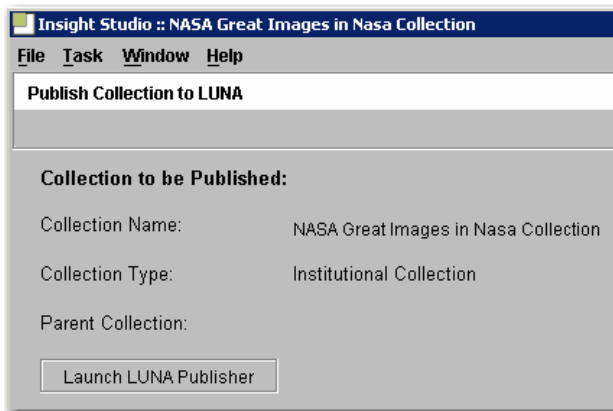
Collections that were created in Insight 5.x+ will not have this issue.

## Publishing a Collection

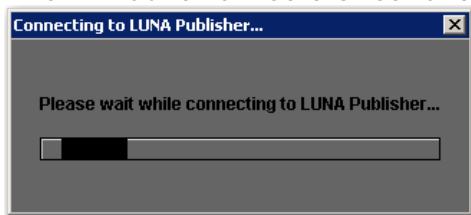
**Start Insight Studio, select the collection you want to publish to LUNA and from the Main Task Menu select the LUNA Publisher.**



**Next, select “Launch LUNA Publisher”.**



This will launch a web browser and connect to the LUNA Publisher.



Once in the LUNA Publisher, you can make your selections in the following areas:

Enter a Task Description (optional).

### **Choose the Theme for your collection.**

Only “default” is available in the initial release of LUNA. Additional themes will become available in the future. These new themes will change the color scheme of the entire application.

Choose the LUNA Header Graphic URL for your collection. If you have not selected one, the default graphic will be used.

Choose the Insight User Group that will be used to access the data from your Insight Collections.

Select the Title Field from the drop down list. This Title will be used to identify individual media items on several pages within the LUNA application, such as the Detail view and as a label in a slideshow.

**Select up to 4 Summary Fields to display. The Summary Fields will display as the user moves their mouse over the thumbnail images.**

**Drag and Drop up to 20 fields into the Who, What, Where and When categories.**

Choose a recurring schedule for the LUNA Publisher to perform updates of the LUNA search index.

You have 4 options When completing this task

Save Task (will only save the task)

Save and Run Task (will save and run the task now)

Save and Schedule Task (will save then execute the task on a schedule)

## Save, Schedule and Run Task

**Collection Properties**

Reschedule: David Rumsey Historical Map-122341294395

**Collection Name:** David Rumsey Historical Map

**Task Description:**

**Theme:** default

**Header Graphic URL:** http://luna.davidrumsey.com:8480/graphics/

**User Group:** Rumsey3x

**Title Field:** Short Title

**Summary Field 1:** Full Title

**Summary Field 2:** Image No

**Summary Field 3:** Publication Author

**Summary Field 4:** Pub Type

**Fields**

Fields	Who	What	Where	When
Attributed Author	Author	Subject	City	Date
Attributed Publication Author	Engraver or Printer	Type	Country	
Authors			County	
Browse Title Sort				
Event				
Download				
Full Title				

Drag and drop up to 12 more fields

**Instructions:**

The following steps are required:

1. Select your LUNA Header Graphic
2. Select your Insight User Group
3. Select a Title field and up to 4 Summary fields
4. Drag and Drop up to 20 fields for your Who, What, When, Where categories
5. Schedule your LUNA Publisher Task

For more details see the LUNA documentation: A Guide to LUNA

**Scheduling:**

Run on the following schedule:

Time of day to run: Hour: 00 Minute: 00

Weekly Monthly

Day(s) of week:

Sun Mon Tues Wed Thu Fri Sat

Save Task

Save & Run Task

Save & Schedule Task

Save, Schedule & Run Task

**Once you schedule this task, the LUNA Publisher will do the following:**

Archive the data from Insight.

Produce an Index for the Collection.

When the Merge and Load task is activated, all collections that have been indexed will be merged and the new Master Index will be created and placed on the live LUNA server.

Note: You need to activate the Merge and Load task before LUNA will make the collections live.

Activating the Merge and Load task

### So **what is Merge and Load?**

During the Publishing process, a collection is turned into a searchable index for a specific collection. Each index is stored in the collection\_indexes folder on your server.

Once you have published all collections that you currently want to make available in LUNA, these separate published indexes need to be merged into a single index. Then when the merge process is complete, the merged index needs to be loaded as the active current index. Once loaded you can search all collections that have been published to LUNA.

### Now to **activate the Merge and Load task**

In the LUNA Publisher task list, locate the Merge and Load task. This will be the one at the top of the List. Click the Modify button.

Task ID	Job Name	Collection Name	User Server Address	Frequency	Status			
1	Merge and Load			Every Sun, Mon, Tue, Wed, Thu, Fri, Sat at 02:00	inactive	Detail		Modify
2	nasaNAS-5-NA-1212518746932	NASA Great Images in Nasa Collection	nasa.lunaimaging.com	Every Sun at 00:00	in-progress	Detail	Delete	Modify

Now set your preference on how often the Merge and Load task will take place. If you want it to run every night at 2am, select all the days of the week and change the hour to 02.

You have 4 options When completing this task

Save Task (will only save the task)

Save and Run Task (will save and run the task now)

Save and Schedule Task (will save then execute the task on a schedule)

Save, Schedule and Run Task

### Testing your LUNA Collections

Once your collection(s) have been Published, Merged and Loaded, you will be able to view your Collections in LUNA.

The address to your LUNA collection will be similar to the following.

<http://www.example.edu:8180/luna/servlet>

If you would like to access your collection(s) without the port number (8180), you will need to configure the system to use the AJP connector. There are instructions on how to work with the AJP Connector for both Apache and IIS available on the web.

This document does not cover how to configure the AJP connector.

## Migrating **Insight Media Groups and Shares to LUNA**

### Introduction

You can perform a one time only migration of Media Groups and Share Folders from your Insight Collections to LUNA.

This process is a single direction process and you will NOT be able to synchronize Media Groups between LUNA and Insight.

You should plan your timing of this process carefully. This should be done with your end users knowledge of what and when this process will take place. Your end users may have a significant amount of work invested in creating and managing these Media Groups and Shares. They should also be very familiar with the new LUNA interface and how they can access their Media Groups once migrated.

### Migrating the Content

#### Prerequisites

On the Install disk for LUNA you will find the utility for the migration in

\\utilities\\media\_group\_migration\_to\_LUNA folder

You will need access to each Insight Collection Manager on your server and database port access. Basically, if you can run the Admin Tools from the machine doing the migration, then you have sufficient database access to perform the migration.

**You will need the InsightServer.dat for each collection you plan to migrate the Collection level Groups from.**

**You need the InsightUserServer.dat for the User Manager.**

---

---

You need the LunaServer.dat that was created at the Install time of LUNA. This file is contained in <LUNA Install directory>/resources/For\_Media\_Group\_Migration

These files have the database connection information in them and will be used for the migration.

You will need access to the User Managers Image-Group-Files folder. This can be a copy or the original.

The utility uses Java 1.4 and it will need to be available for the migration. All of the Insight servers use Java 1.4 so you can reference the Insight Server version.

Make sure all Shares have an owner. This can be done using the Admin Tools and looking at the Owner Column of the User Shares. If they do not have an owner, please assign one or a random owner will be assigned at the time of migration.



#### IMPORTANT NOTE

If you are migrating virtual collections, you will need to modify the VCIDToLunaIID.txt file.

On the left enter the Insight VCID for the collection  
VC\_Archivision\_Digital\_Research\_Library\_(Base-1)

Then enter a tab character

Next enter the Institution ID for the LUNA collection  
ARCHIVISIONACM\_Base-3

For example:

VC\_Archivision\_Digital\_Research\_Library\_(Base-1)      ARCHIVISIONACM\_Base-3

Do this for each virtual collection you are migrating from.

Steps for the Collection Level Group Migration

Copy the media\_group\_migration\_to\_LUNA folder to the location where you will perform the migration.

**Copy** the LunaServer.dat into your media\_group\_migration\_to\_LUNA folder.

Edit the LunaServer.dat.

Modify the MediaGroupDefaultPassword= property to set the password used to Protect the Media Groups in LUNA.

Set the ImageGroupFileDir= to point to the Image-Group-Files folder.

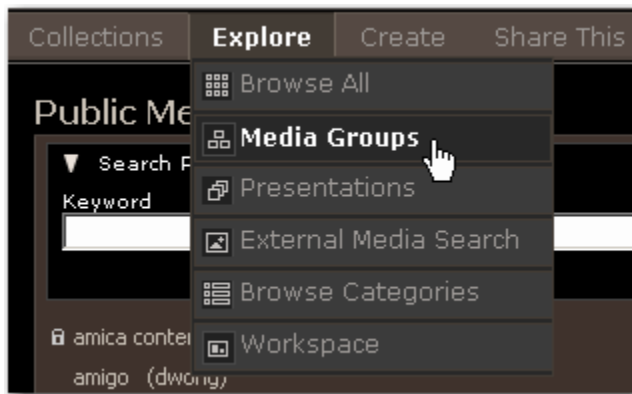
Copy the InsightServer.dat into your media\_group\_migration\_to\_LUNA folder.

Edit to the run\_collectiongroupexport.bat (windows) or run\_collectiongroupexport.sh (Linux or Solaris) to point to a local version of Java 1.4 if it is not in your PATH environment.

Execute the run\_collectiongroupexport script (only once) if you run this twice, you will end up with duplicate Media Groups.

Verify that the Media Groups are in your LUNA system located in Explore/Media Groups.





**Repeat for each Collection Manager that you are migrating Collection Level Media Groups from by replacing the InsightServer.dat.**

Steps for Migrating Insight Shares and Media Groups

Copy the media\_group\_migration\_to\_LUNA folder to the location where you will perform the migration.

Copy the LunaServer.dat into your media\_group\_migration\_to\_LUNA folder.

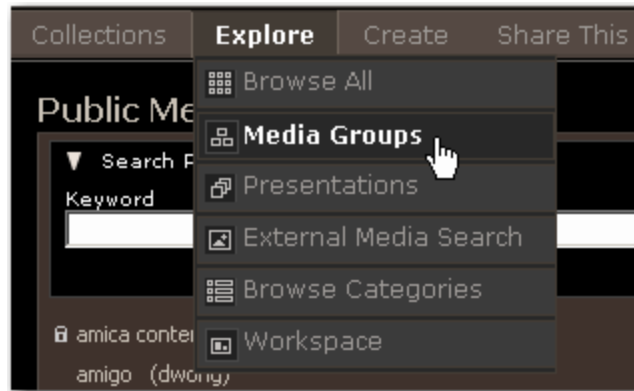
Edit the LunaServer.dat.

Modify the MediaGroupDefaultPassword= property to set the password used to Protect the Media Groups in LUNA.

Set the ImageGroupFileDir= to point to the Image-Group-Files folder.

Edit to the run\_shareexport.bat (windows) or run\_shareexport.sh (Linux or Solaris) to point to a local version of Java 1.4 if it is not in your PATH environment.

- Execute the run\_shareexport script (only once). If you run this twice, you will end up with duplicate Media Groups.
- 
- Verify that the Media Groups are in your LUNA system located in Explore/Media Groups.



- 
- 
- 
- 
-

## Managing LUNA with **the Administrator Tools**

### Introduction

The Administrator tools have been enhanced to incorporate tasks for managing the LUNA application and configuration.

- 
- In the Administrator Tools you can:
  - 
  - Manage user rights
  - Manage Credentials
  - Manage IP range access privileges
  - See what collections LUNA has loaded
  - Manage the LUNA Application Configuration
- Manage the Collection Properties
  - Place the LUNA Application into maintenance mode
  - 
  - Managing User Rights and Access Privileges
  - 
  - Before defining how to manage users and their privileges, you need to understand what options exist and how they are integrated with current Insight User Management.

**If you have been working with Insight, then you should be familiar with how Insight grants access to collections. LUNA can work with existing Insight authenticators to grant your users access to your collections.**

During your installation, you were asked for your User Manager's address. If you are using the default Insight User Manager to grant access to your collections, then you do not need to do anymore work to allow your users access to collections in LUNA.



LUNA also has several other authenticators that can be used to grant access to your Collection resources.



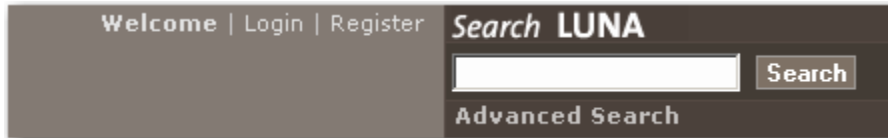
LUNA self registration and user management

Integrate with Active Directory LDAP  
Authenticate via LDAP

## LUNA Self Registration

---

During the install process you were given the option to let users self register in LUNA. If you selected this option you will see the Register option at the top of the LUNA application.



This allows the user to create and manage their own account in LUNA. Once registered, the user will be granted the default privileges defined in the default Credential.

- Integrate with Active Directory Using Kerberos and LDAP
- As with Insight, LUNA can be integrated with Active Directory to grant access to your Collections.
- 
- To configure LUNA with your Active Directory server, you will need to contact our support department for instructions on your specific configuration [lunasupport@lunaimaging.com](mailto:lunasupport@lunaimaging.com). This document does not go into the configuration details of Active Directory integration.
- 
- Integrate with LDAP
- As with Insight, LUNA can be integrated with LDAP to authenticate your users and grant them access to your collections.
- 
- To configure LUNA with your LDAP server, you will need to contact our support department for instructions on your specific configuration [lunasupport@lunaimaging.com](mailto:lunasupport@lunaimaging.com). This document does not go into the configuration details of LDAP.
- 
- 
- Advantages of LUNA Authentication Methods Not Available in Insight Java Client



LUNA authentication has been designed to be more flexible to allow for future authentication methods and to allow for mixed authentication methods to be used.



LUNA can be configured to use more than one authentication method in your environment. LUNA can be setup to step through any number of authenticators. For example:



You can have LUNA access the Insight User Manager and also allow for LUNA self registration.



You can have an LDAP server authenticate and use the Insight User Manager to grant access to individuals who are not in your LDAP server.

**There are many ways LUNA can be configured. Please contact [lunasupport@lunaimaging.com](mailto:lunasupport@lunaimaging.com) for any questions you might have.**

#### LUNA's Escalating Collection Access

LUNA has also been designed to grant increasing access as a user passes certain conditions.

At your institution you may want to do the following:

Level 1 anonymous user - off site but you still want to make some of your collections accessible.

Level 2 (within a larger block of IP's) – on site privileged collections are accessible.

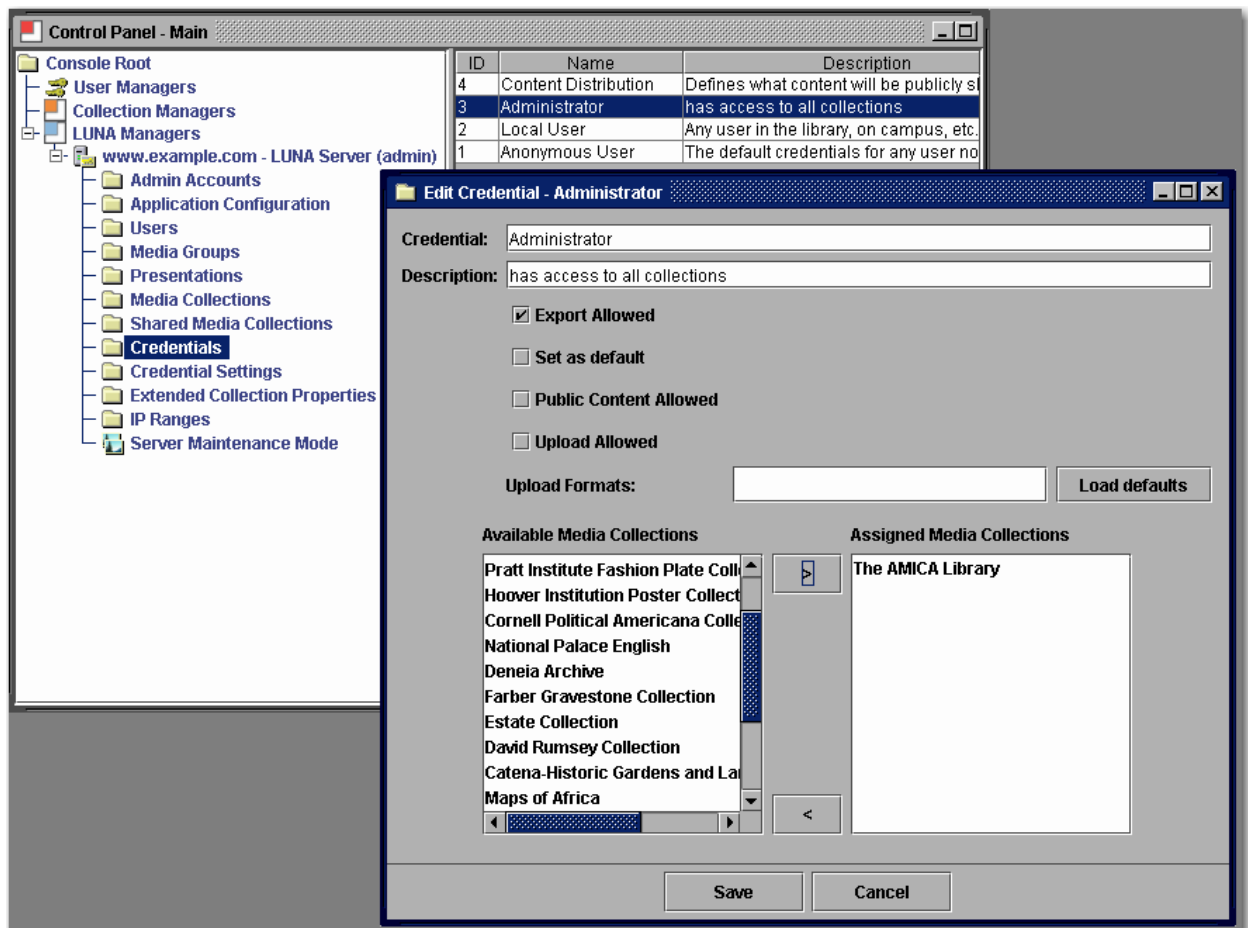
Level 3 (within a restricted block of IP's) – on site but in a particular area where the user is granted access to restricted collections.

Level 4 (logged in to LUNA) - granted access to even more collections with the ability to export.

**This** is a very flexible system and can meet many needs for granting varied collection access.

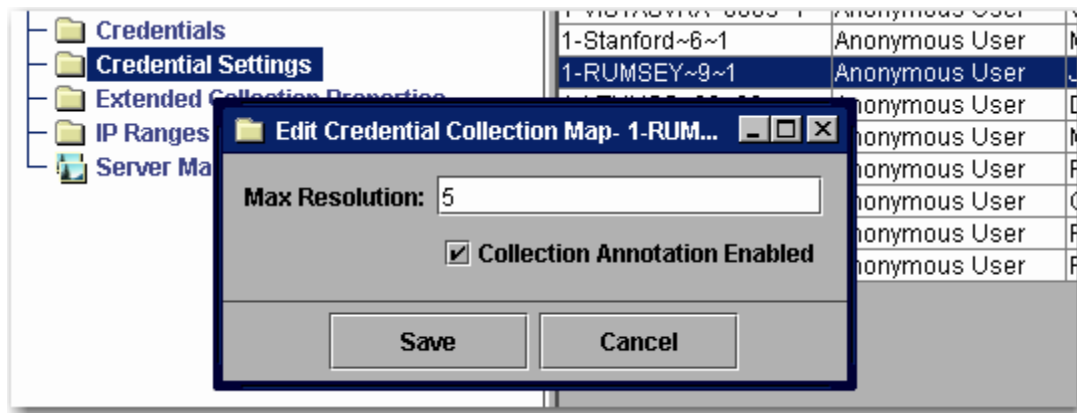
#### Credentials

Credentials are used to define a set of privileges to selected collections.

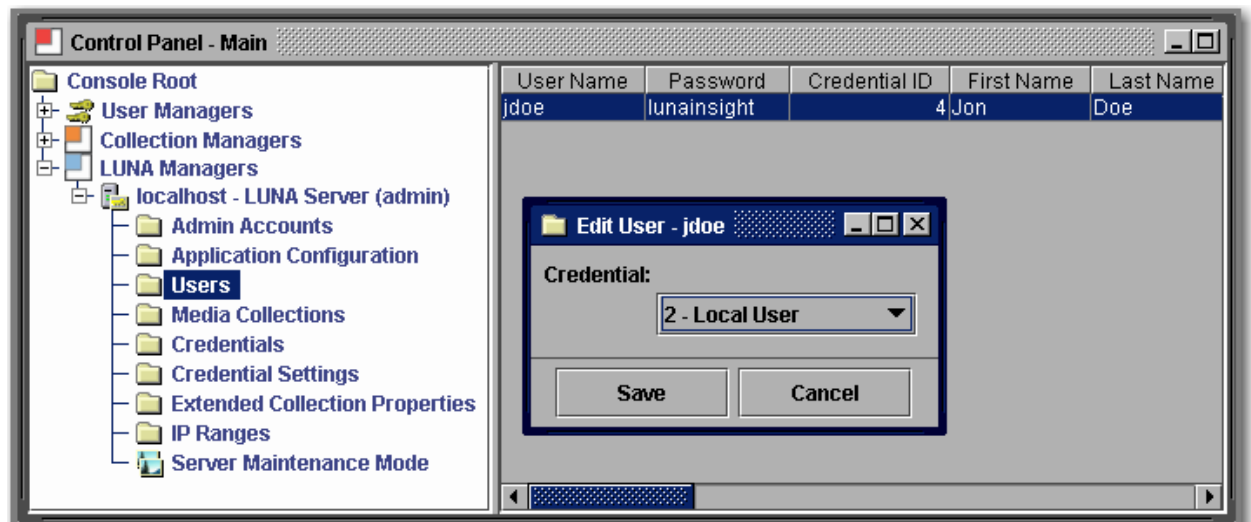


- There are four Credentials by default in your LUNA application. You are responsible to define what each one of these will be used for. You can create as many Credentials as you want.
- 
- With a Credential you can:
- 
- Define what collections are accessible
  - Indicate if exporting will be allowed (this includes media and presentation exports)
  - Define it as the default (only one allowed)
  - Indicate if the LUNA Commons (publicly shared collections) will be accessible
- Grant Access to My Uploads
- Define the My Upload formats that a user can upload to LUNA
- 
- Only one credential can be assigned to:
- An IP Range
- A User
- Default (Anonymous User)
- 
- Run Maintenance Mode twice to load your new Credential settings.
- 
-

- Credential Settings
- Using Credential Settings, you have the following three options: 3, 4 and 5.
- 3 indicates the user has up to Size 3 access (768 pixels on the long side).
- 4 indicates the user has up to Size 4 access (1536 pixels on the long side).
- 5 indicates the user has full access privileges to the images.
- 
- Allow Collection Level Annotation. This grants the user the ability to save an annotation that will be accessible to all users for a specified collection.
- 
- 



- 
- Access to LUNA Size 2 (384 pixels on the long side) is automatically assumed.
- 
- User Settings
- Each user will be assigned a credential.
- 

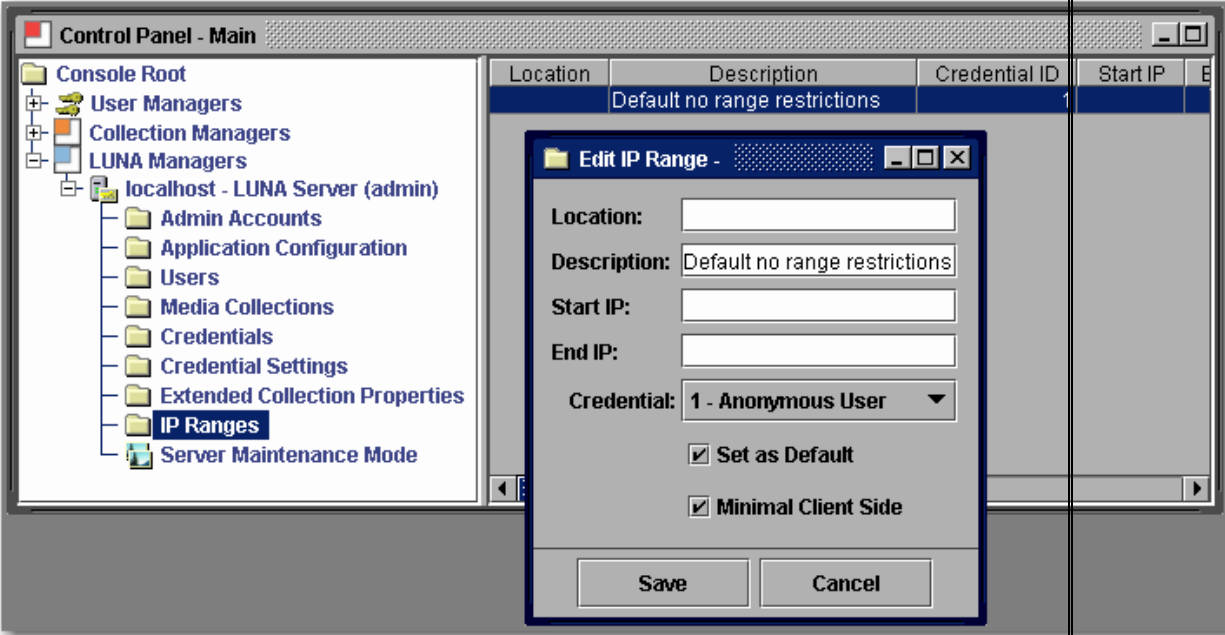


- 
- 
- Users cannot be added from the Admin Tools. Instead, they will be created through the following:

User Self Registration (passwords will display in Admin Tools)  
 Automatically migrated from the Insight User Manager on first login (passwords never copied)

- From Active Directory (passwords never copied)

- From LDAP (passwords never copied)
- 
- 
- 
- Each authenticator will add its own user and each user is granted the default Credential. You can reassign a Credential to a user at any time.
- 
- If you are using the Insight User Manager to get access to your collections, you will receive access to all collections you had access to in Insight.
- 
- IP Ranges
- IP Ranges are another way of assigning Credential level privileges. You can set up IP ranges to grant access to specific areas and access to specific content.



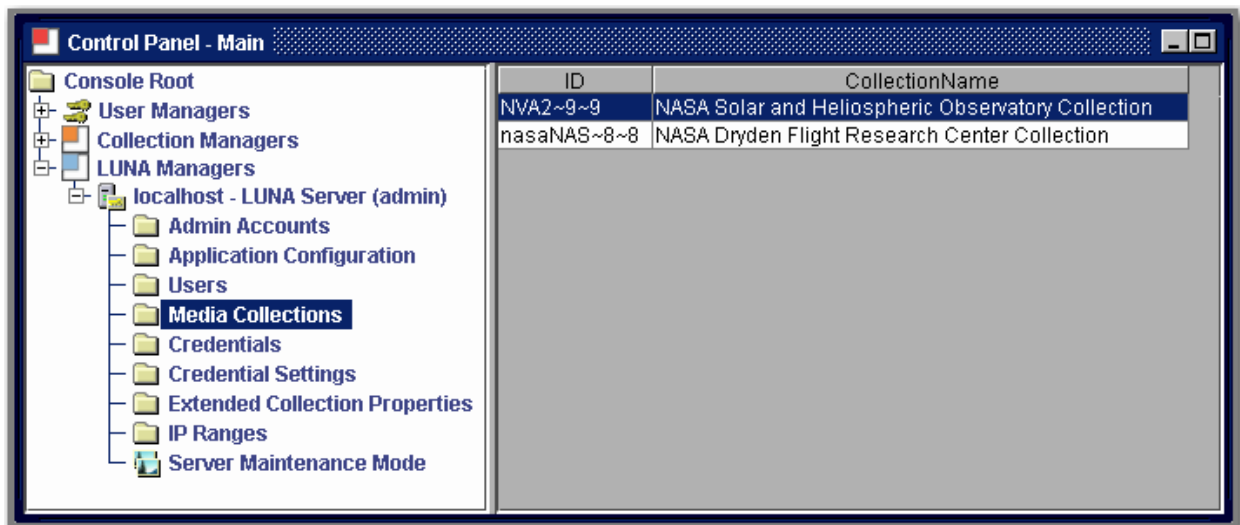
! ! ! !

Run Maintenance Mode twice to reload your new settings. Also to test make sure you quit all browsers on the tested system then test your access changes



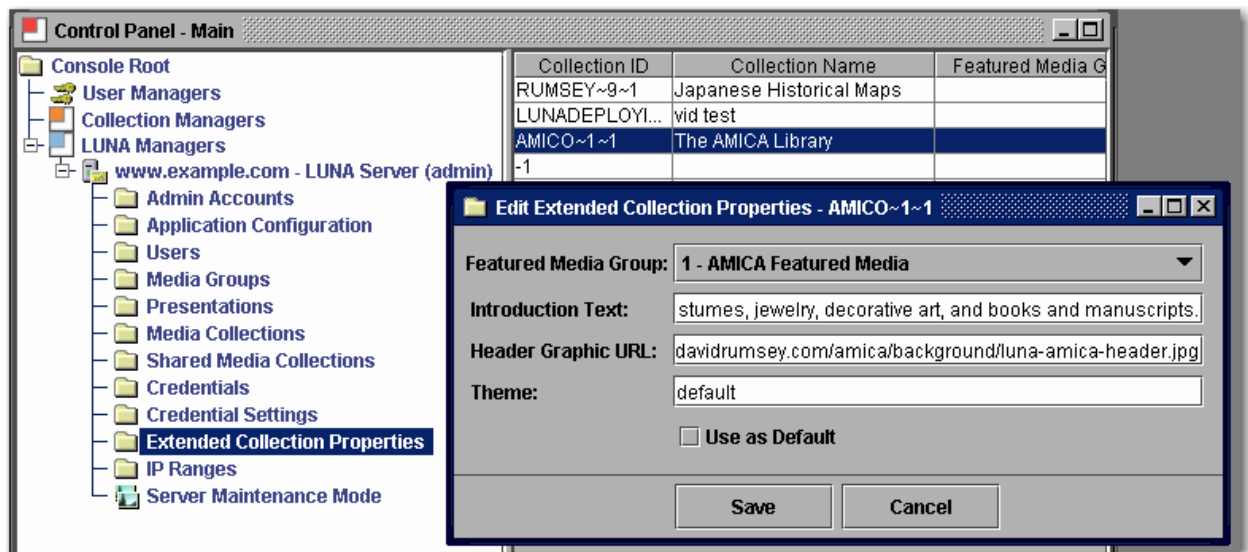
## Media Collections

Media Collections shows you which collections have been added to LUNA.



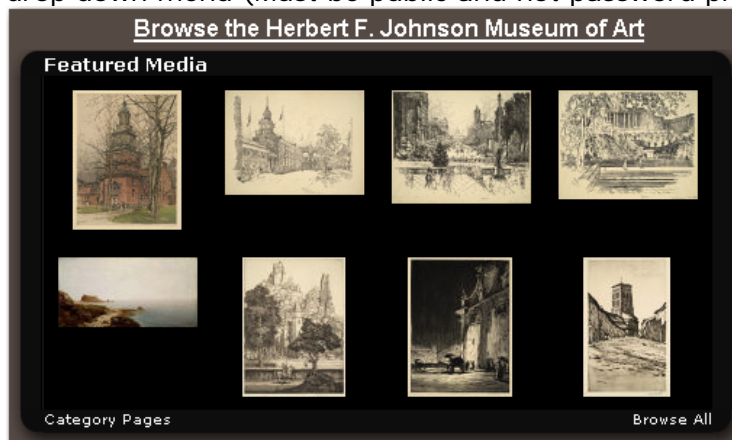
### Extended Collection Properties

Extended Collection Properties are provided to allow you to make changes your collections.



Extended Collection Properties will allow you to do the following:

- Set the Media Group that is used for your Featured Media on your Collections Page. This will allow the end user to see a selected set of media for the specified collection. To use this option, first make a Media Group in LUNA then select the group in the drop down menu (Must be public and not password protected).



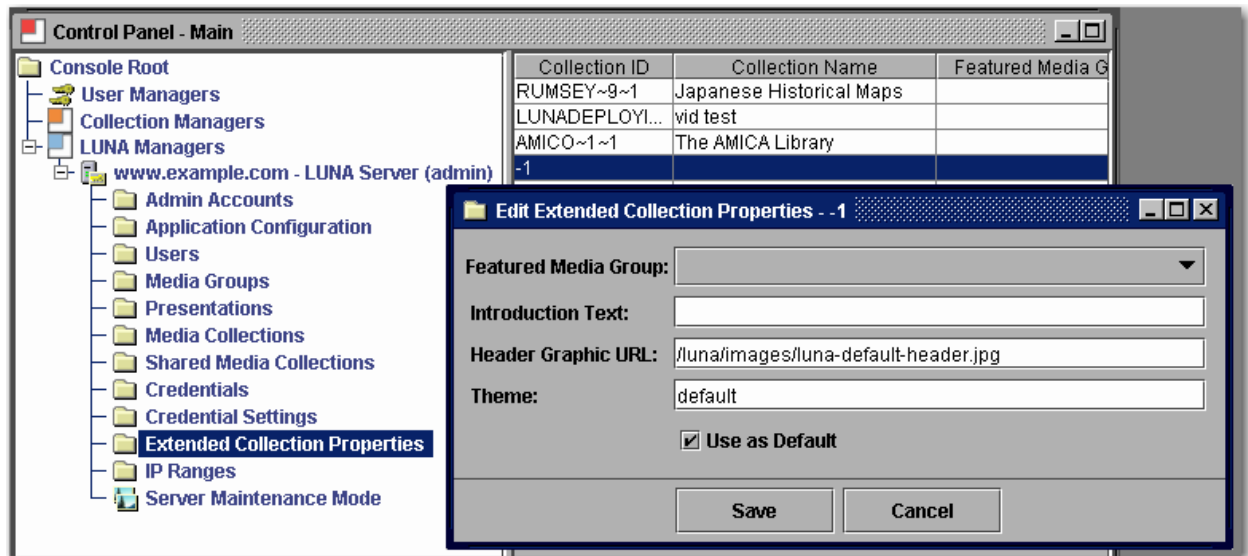
Redefine the collection's Introduction Text (this text is automatically pulled from your Insight Collection and may not need to be updated).

Change the Header Graphic URL. This Graphic must be exactly 754 x 65 pixels and be available from any browser accessing the collection.

Indicate what theme will be used by your collection. At the time of this release, only "default" is available. In the future other themes that will define the entire color scheme of the application will be available to set. If you would like to participate in defining Themes, please contact Luna's support department [lunasupport@lunaimaging.com](mailto:lunasupport@lunaimaging.com).

Defaults for Multi Collection Access

Collection ID -1 is the default used for any user accessing more than one collection.

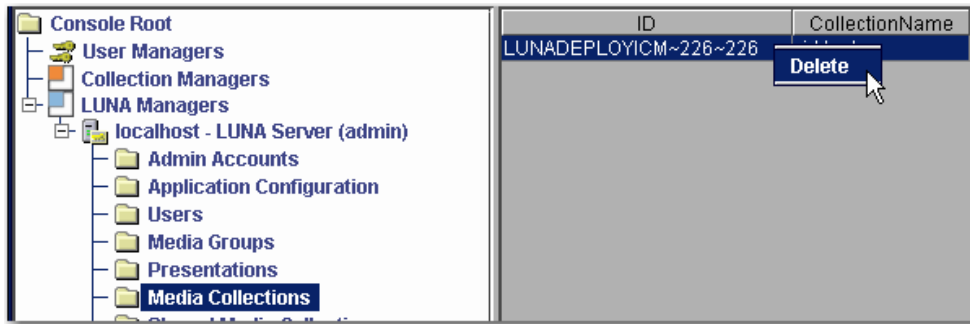


This is a very important graphic and will be used to give identity to your institution. Many times default access will be to more than one collection and you will want to have your institution's identity defined here.

Deleting a Collection from LUNA

Deleting a Collection from LUNA is done in a few steps.

Delete the collection from the Admin Tools.



Run the Merge and Load task

This will remove the content from the search Index.

Your LUNA system will not work properly unless you do this step.

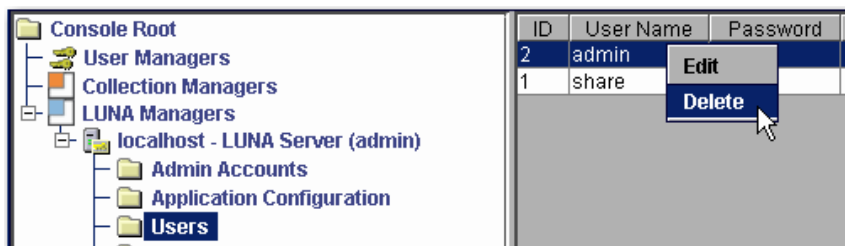
Restart your Jboss or tomcat server

Deleting a User from LUNA

Deleting a User from LUNA is done the following way.

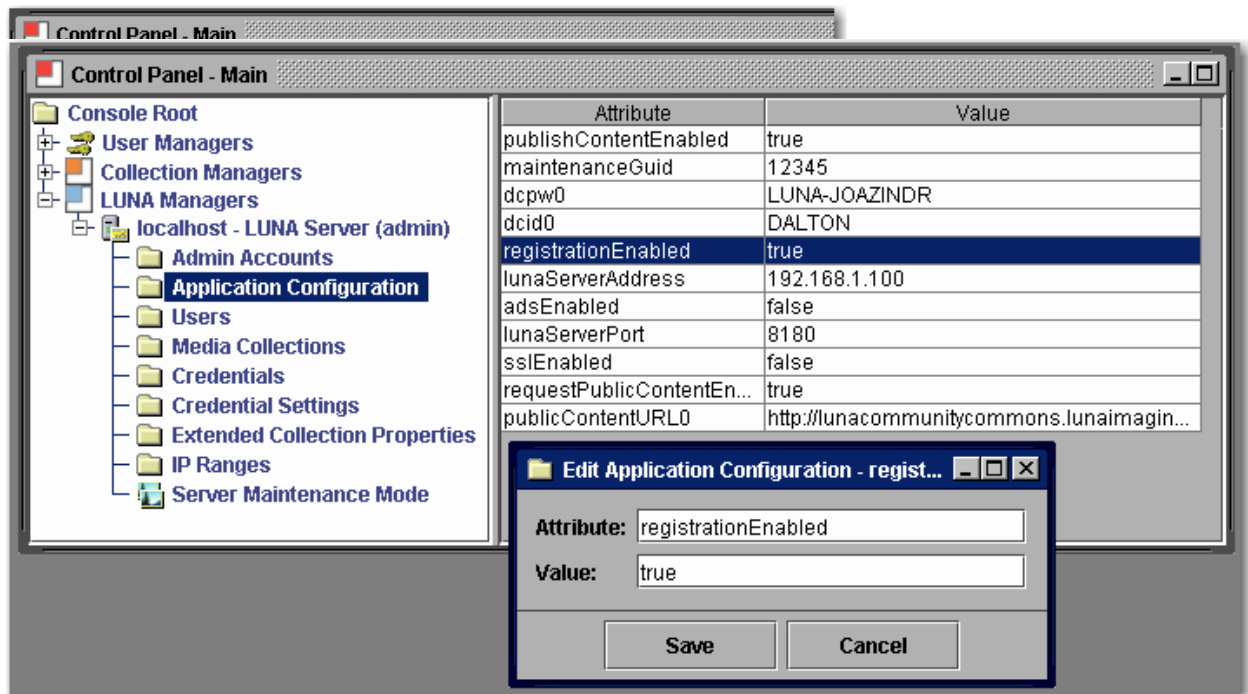
NOTE: Before you delete the user, Note the ID associated with that user.

Select the User in the Admin Tools and right click and select delete.



Once you delete the user, All Media Groups and Presentations that the user owned will be orphaned.

Open the Presentation or Media Group folder in the Admin Tools and locate any item that was owned by the User you just deleted and change the ID to another User's ID who you would like to pass ownership to. After you finish, run the Maintenance Mode twice.



During the installation process these settings were defined. If you need to make modifications to any of these properties, be aware that it will affect how LUNA functions. If you are unsure of what a particular setting is for, do not

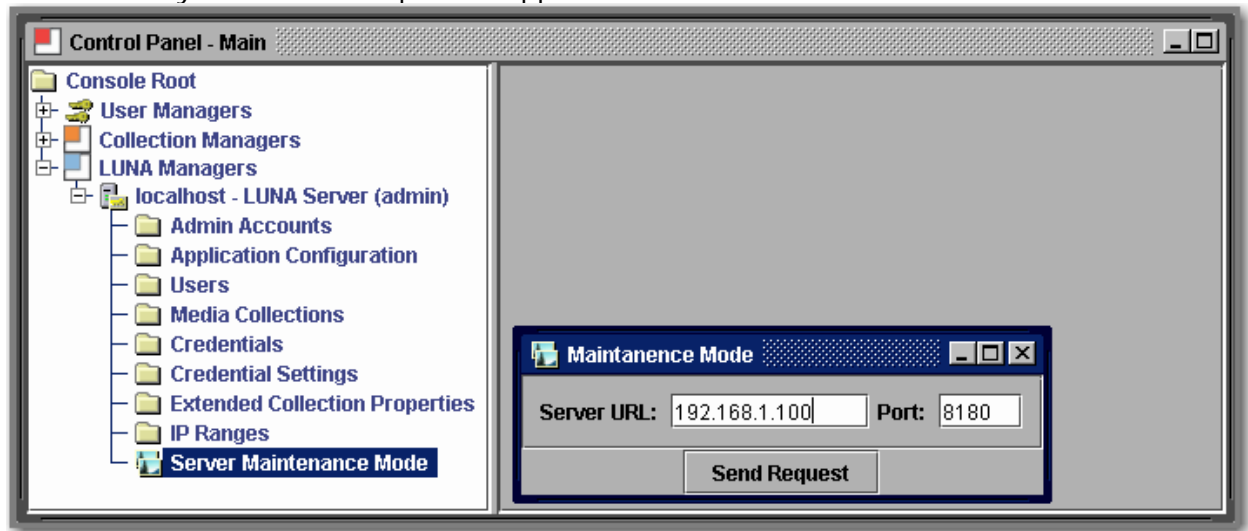
# change it without first contacting Luna support for an explanation of the setting.

---

Making any change most likely will require the application to be restarted.

## Maintenance Mode

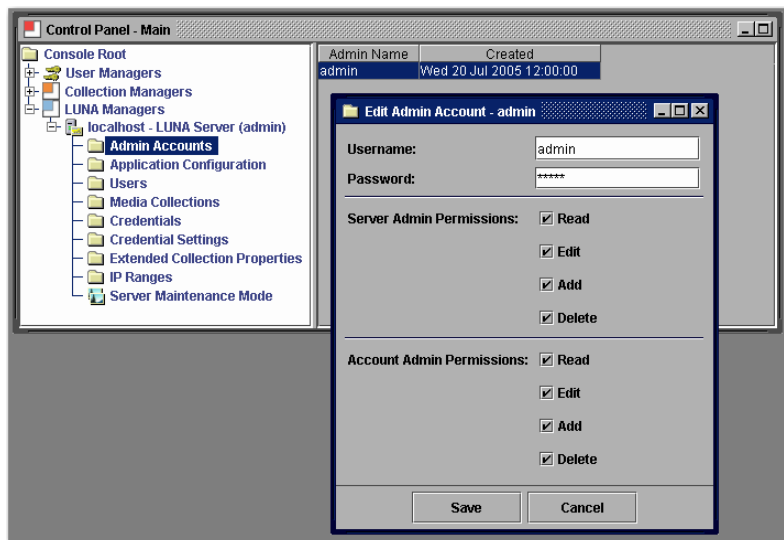
On occasion you will want to put the application into a maintenance mode.



Maintenance Mode can also be used to reload User and Credential Settings. To trigger Maintenance Mode send one request, then send a second to take the system out of Maintenance Mode and reload your settings.

## Admin Accounts

Used to control access to the Admin Tools console.



Like in User Manager and Collection Manager sections of the Administrator Tools, The LUNA Manager also has Admin Accounts. These accounts grant access to the Admin Tools.

Server Admin Permissions grants access to perform actions in the Admin Tools.

Account Admin Permissions grants access to create and manage Admin Accounts.

## Virtual Collections in LUNA

### Introduction

This section describes how to prepare your system to support Insight Virtual Collections in LUNA.

**You will need to update your Insight Collection database by running a script that changes a Primary Key on the IRGROUPS table of your Insight Collection Manager database.**

**You will then need to use the Administrator Tools (6.0.1+) to prepare the virtual collection for LUNA as described in this section.**

Once you have completed this preparation, you can publish your virtual collections the same way you publish other collections to LUNA.

## Updating **your Insight Database**

- Warning!!! Before making any database changes, always backup your current database.
- 
- The first step is to change the Primary key of the IRGROUPS table in the Insight database that contains your virtual collection.
- 
- There are two ways you can do this.
- If you are familiar with how to change primary keys in your database, you can change the Primary Key on the table IRGROUPS from (GROUPID) to (UNIQUECOLLECTIONID,GROUPID,VCID)

Use one of following database scripts links to update your IRGROUPS table  
For MySQL

- For MSSQL
- For Oracle
- 
- Preparing your Virtual Collection with the Administrator Tools
- Using your Administrator Tools (6.0.1+) open your collection configuration panel for the Virtual Collection you would like to make available in LUNA. Scroll to the bottom of the panel. You will see a button that says "**Prepare Collection Configuration for LUNA**".

Select this button. (This button will only show for virtual collections).



The screenshot shows the Dalton Collection Manager (admin) interface. On the left is a tree view with the following structure:

- Console Root
  - User Managers
  - Collection Managers
    - Dalton Collection Manager (admin)
      - Catalog Templates
      - Collection Settings
        - Public Dalton Archive
          - Collection Configuration (selected)
          - User Groups
          - Media Groups
          - Tables
          - Edit joins
          - Multi-Page Documents
          - Approval Levels
          - Measurement Tool
          - Collection Editor
          - Visual Resource Collection
        - Server Settings
        - LUNA Managers

On the right, a table displays collection data:

Institution ID	Collection ID	VC ID	Collection Name	
Daltonicm	1	NA	Visual Resource Collection	1
Daltonicm	1	VC_Public_Dalton_Archive	Public Dalton Archive	1

The 'Public Dalton Archive' configuration window is open, showing the following settings:

- Drag Speed Coefficient: 2
- Help Group: m/support/5\_5/insight/en/index.html
- Help Image: m/support/5\_5/insight/en/index.html
- Simultaneous MW Loads: 2
- Simultaneous GW Loads: 5
- Web Initiated JVA URL: erInsight/BrowserInsight?cmd=start
- Web Initiated JVA HTML Template: id(0),">[open in Insight&#8482;]</a>
- Thumbnail Cache Profile ID: 1
- Fast Scaling: ☒
- Language Code: en
- Country Code: US
- Force collection name display: ☒

Buttons at the bottom of the configuration window include 'Edit Visual Attributes', 'Edit Browser Attributes', and 'Prepare Collection Configuration for LUNA'. At the very bottom of the window are 'Save' and 'Cancel' buttons.

Once you have selected the Prepare Collection Configuration for LUNA button, you will need to set a New Institution ID for the collection. Make sure this is different than the Source Institution ID.

**Public Dalton Archive - New Institution ID for VC**

To make this Virtual Collection available as a LUNA Collection, the Collection Configuration needs to be duplicated and you need a New Institution ID. This Institution ID must not be the same as the Source Institution ID.

When you click 'Save', your Collection Configuration will be duplicated with the New Institution ID.

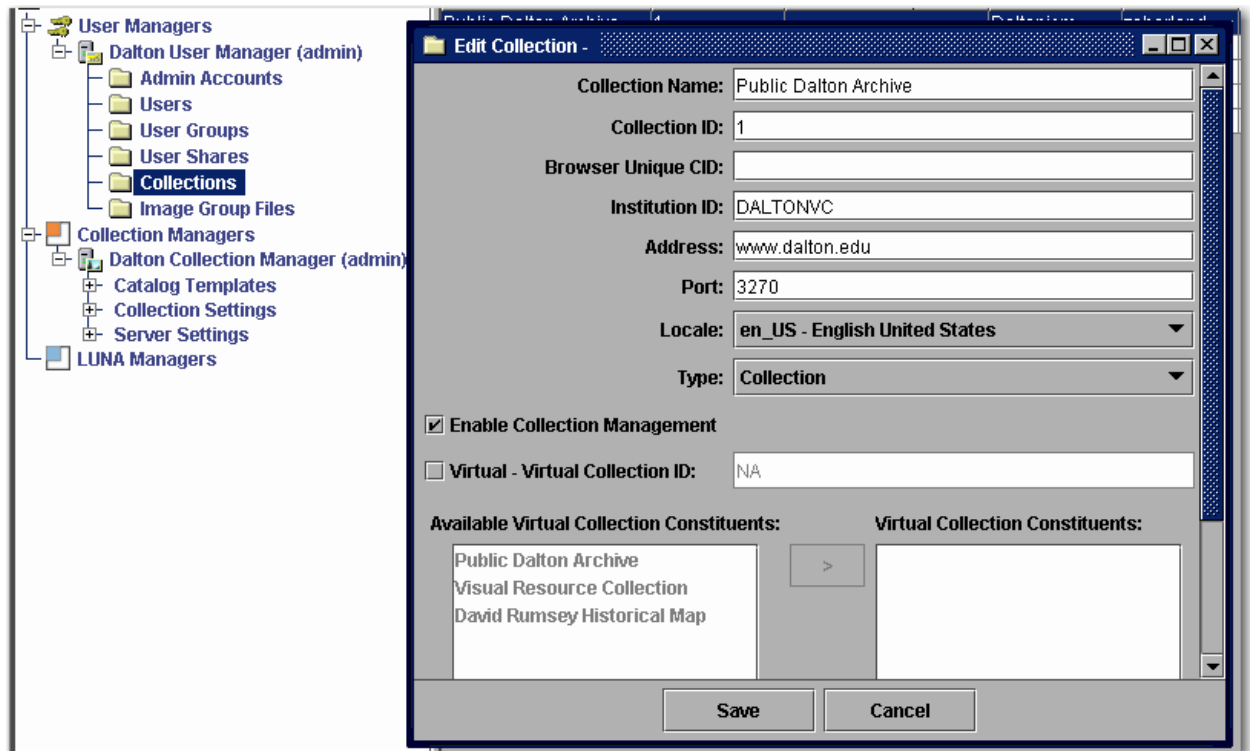
New Institution ID:

**Save** **Cancel**

- 
- 
- As described in the previous panel, your collection entry will be duplicated and you will now have two entries for your Virtual collection. The original and now the new one with the New Institution ID and the VC ID of NA.

Institution ID	Collection ID	VC ID	Collection Name
Daltonicm	1	NA	Visual Resource Collection
DALTONVC	1	NA	Public Dalton Archive
Daltonicm	1	VC_Public_Dalton_Archive	Public Dalton Archive

- 
- 
- Next you will need to add an additional Collection entry to the User Manager to access the Virtual collection in LUNA.
- 
- Under the Collections section of the User Manager, create a new entry and fill in Collection Name, Collection ID, your new Institution ID Server Address and port number. Then save your Collection entry.



- 
- 
- Next you will need to give a Studio privileged user access to this collection.
- For instructions on this, follow the “Granting Access to Insight Studio” in the “User’s Guide to Basic Collection Building”.
- 
- Once a user has access to this virtual collection in Studio, they can Publish the collection into LUNA just like any non-virtual collection.

on page 48).

2) Test.

**NOTE:** This Section is provided for your convenience and duplicates the 5.0 upgrade.

## Pre-Installation Checklist:

The Following Checklist is not required by the upgrade but will help you keep record of your configuration. The Upgrade Process makes use of the existing database connection information contained in the InsightServer.dat, InsightUserManager.dat and BrowserInsight.conf files for the installation process.

**Table 6: Pre-Installation Checklist**

User Manager	
User Manager Address:	

<b>NOTE: This should be a fully qualified Hostname, not an IP</b>	
Database Type:	MSSQL Server 7+ ____ Oracle 8, Oracle 9+ ____
Database Hostname / IP:	
Database Port:	
<i>Common Ports (MSSQL 1433, Oracle: 1521)</i>	
Database Username:	
Database Password:	
Database Name / SID Name	
<i>(SID is for oracle)</i>	
Database Service Name (Windows only):	
User Manager Installation Directory	
<b>Collection Manager</b>	
Collections to Upgrade:	
Database Type:	MSSQL Server 7+ ____ Oracle 8, Oracle 9+ ____
Database Hostname / IP:	
Database Port:	
<i>Common Ports (MSSQL 1433, Oracle: 1521)</i>	
Database Username:	
Database Password:	
Database Name / SID Name:	
<i>(SID is for oracle)</i>	
Database Service Name (Windows only):	
Collection Manager installation Directory:	
Media Storage Location:	
MrSID Server URL:	
<b>NOTE: You will need to repeat the information above for each collection Manager</b>	
<b>Administrative Information</b>	
Insight Administrator Username:	
Insight Administrator Password:	
<b>Tomcat or Resin Information</b>	
Hostname:	
<b>NOTE: This is commonly the same as the User Manager Address</b>	
Port	
<b>4.x - BrowserInsight</b>	
Hostname:	
Port:	
Installation Location:	
<b>4.1 - XML Gateway (if installed)</b>	
Hostname:	
Port:	
URL:	
Installation Location:	

***NOTE: The Hostname information for all components will be used for registering your license key.***

## Preparing your System for the Upgrade

---

Before you run the upgrade script and the Upgrade Installer, there are a few tasks you should perform.

### Backing up your Databases

Before making any changes to your database or Insight configuration, make sure you back up your database. This will ensure that you can safely restore any changes. It is also advisable to make a copy of the database to ensure that you do not affect production systems.



**WARNING:** BACK UP YOUR DATABASE BEFORE GOING ANY FURTHER

The Upgrade script will make your database incompatible with previous versions of Insight and can not be undone.

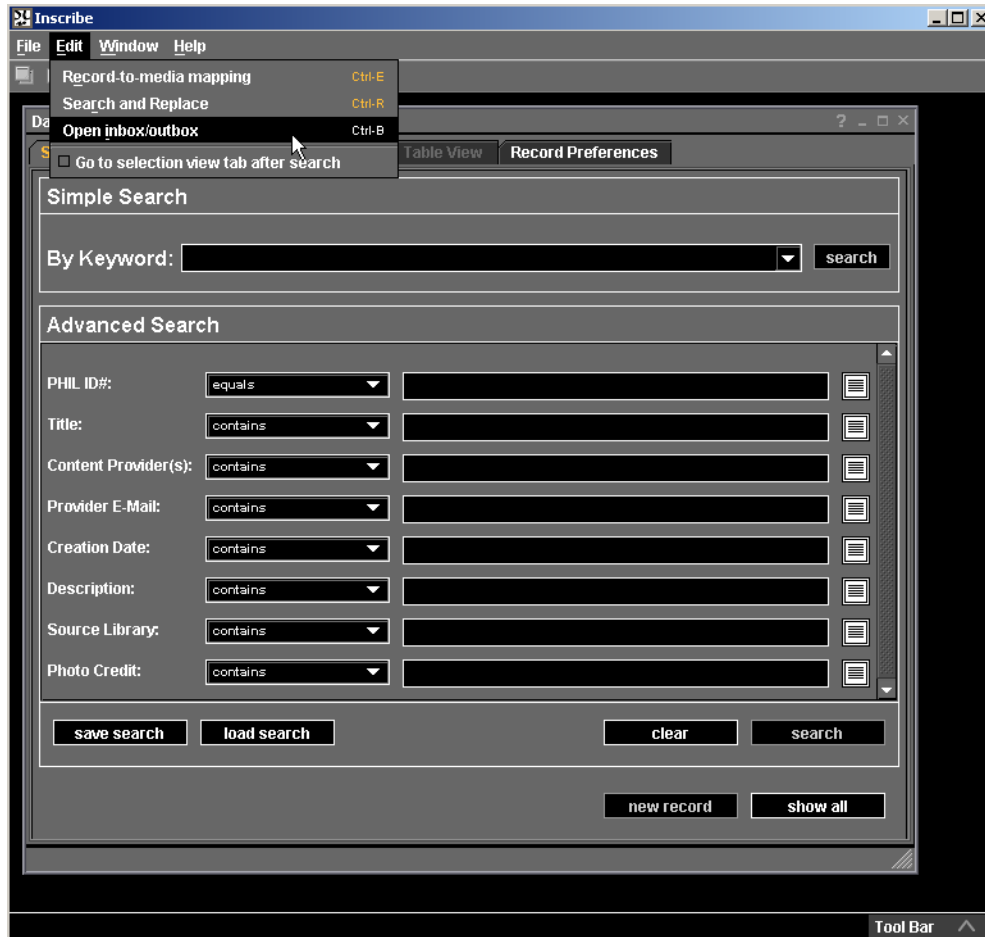
### Backing up your Configuration Files

You should also back up your configuration files and system data files. Include the Collection Manager, User Manager, and BrowserInsight directories and all of their contents.

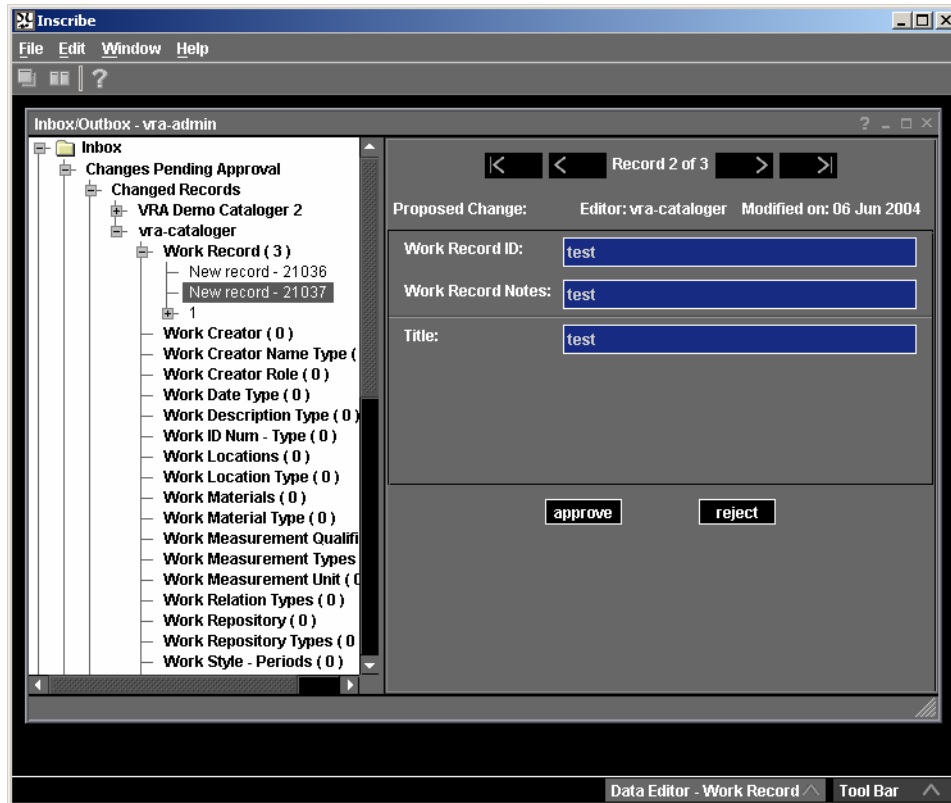
### Accepting all Pending Changes in Inscribe

If you are using a database that supports Inscribe, the first step is to accept all pending changes. To accept any pending changes:

- 1) Log into Inscribe as an administrative user.
- 2) Go to the "Edit" menu and choose "Open inbox/outbox".



- 3) Click on each entry in the "Changes Pending Approval" workflow tree ("Changed Records", "Record-to-Record Mapping", "Record-to-Media Mapping", and "Deleted Records") and either accept or reject the changes.



4) Once you have finished, exit Inscribe.

## Shutting Down your Collection Manager

Before you can run the database upgrade script and once you have accepted all of the pending changes in Inscribe, you will need to shut down your 4.x Collection Manager. This will ensure that no users login or make any changes during the upgrade process.

## Insight VRA v1 Model Upgrade Script

If you are using the Insight VRA Model (shipped with Insight Standard 3.5 – 4.1) we suggest you run the VRA Model Upgrade script.

The script solves a series of issues with the VRA Model including:

- Improved Browser Support for the Reproduction Record when searching
- Support for Data Import using the Insight Studio Data Import Tool



**WARNING:** This upgrade script is designed specifically for the VRA v1 model. If you run the VRA Upgrade Script on a database that is not a VRA v1 Model you will experience issues.



**WARNING:** If you have customized the VRA v1 Model by adding / removing fields, please contact Luna before running this script.

**NOTE:** If you are unsure whether you are using the VRA v1 Model, please contact <mailto:LunaSupport@lunaimaging.com> for help in determining which version you are running.

## To run the VRA Upgrade Script

1) Open a database script editor and connect to your **Collection Manager** database.

### Microsoft SQL

- SQL Query Analyzer or isql

### Oracle

- SQLPlus or SQLPlus Worksheet

**NOTE:** To run the Upgrade script you must have the Oracle “Resource” permission. This permission will only be required during the upgrade process and can be removed after the script has been run. The script creates several sequences and triggers in order to autonumber some columns in several temporary tables. These are not required after the upgrade process.

2) Open the appropriate upgrade script for your database version.

**Table 7: Locations for the Insight VRA 4.1 to 5.0 Upgrade Script**

Database	Location
MSSQL	CD3_Upgrade\utilities\sql\MSSQL\41_to_50\41_to_50_VRA_Patch_MSSQL.sql
Oracle	CD3_Upgrade\utilities\sql\Oracle\41_to_50\41_to_50_VRA_Patch_Oracle.sql

3) Read the instructions at the top of the file.

4) Run the script.

5) Please report any errors to Luna Technical Support.

## Testing the VRA Upgrade Script

You may test the VRA Upgrade Script by starting your Collection Manager and/or BrowserInsight and connect with Insight / Inscribe / BrowserInsight. If you can connect, add / delete records without any errors, then the script should have run successfully.

## Running the Database Upgrade Script

You must upgrade both your User Manager and Collection Manager databases to be able upgrade to 5.0. There are two upgrade scripts, one for your User Manager and one for your Collection Manager, which are located in the sql directory of the



upgrade CD, in a subdirectory for each database type. (If you are upgrading from a pre-4.0 version of Insight, you will first need to upgrade to 4.0)



**WARNING:** BACK UP YOUR INSIGHT DATABASES! THIS SCRIPT IS NOT REVERSABLE.



**WARNING:** IF YOU HAVE MADE ANY CHANGES TO YOUR INSIGHT DATABASE'S SCHEMA OR HAVE APPLICATIONS DEPENDING ON INSIGHT'S TABLE STRUCTURE, THIS UPGRADE MAY FAIL OR BREAK THOSE APPLICATIONS. PLEASE CONTACT LUNA IF YOU HAVE ANY QUESTIONS ABOUT THE SCHEMA OR CHANGES TO IT IN 5.0.

**LUNA IMAGING INC IS NOT RESPONSIBLE FOR ANY MODIFICATIONS MADE TO YOUR DATABASE OUTSIDE THE SCOPE OF THE INSIGHT INSTALLERS AND/OR THE INSIGHT UPGRADE SCRIPTS.**

## To run the User Manager upgrade Script

- 1) Open a database script editor and connect to your **User Manager** database.

### Microsoft SQL

- SQL Query Analyzer or isql

### Oracle

- SQLPlus or SQLPlus Worksheet

**NOTE:** To run the upgrade script you must have the Oracle "Resource" permission. This permission will only be required during the upgrade process and can be removed after the script has been run. The script creates several sequences and triggers in order to autonumber some columns in several temporary tables. These are not required after the upgrade process.

- 2) Open the appropriate upgrade script for your database version.

**Table 8: Locations for the User Manager 4.1 - 5.0 Upgrade Script**

Database	Location
MSSQL	CD3_Upgrade\utilities\sql\MSSQL\41_to_50\41_to_50_User_MSSQL.sql
Oracle	CD3_Upgrade\utilities\sql\Oracle\41_to_50\41_to_50_User_Oracle.sql

- 3) Read the instructions at the top of the file.
- 4) Run the script.

5) Please report any errors to Luna Technical Support.

**NOTE:** Insight 5.0 requires all User Names and Group Names to be unique. When the script encounters a duplicate User Name it will alter the User Name to include "\_\_UserName\_Modified\_" plus a unique number. When the script encounters a duplicate Group Name and unique Code Key it will alter the Group Name to include "\_\_UserGroup\_Modified\_" plus a unique number. If the script encounters a duplicate Group Name and Code Key combination it will consolidate all groups into a single instance.

**NOTE:** Renaming User Group Names will require the renaming of the corresponding physical directories in the "Image-Group-Files" Directory of the User Manager as well. Otherwise, your user groups will not be visible via the Java Client.

Please follow these steps only when duplicate Group names are encountered

- All Login Groups that get renamed by the script are required to be updated in the Collection Manager. Please use InsightAdministrator Tools 4.1 to update the User Group names on the Collection Manager to match the names in the User Manager.
- All User Shares that get renamed by the script are required to be updated on the Collection Manager server. Please execute the bat/cmd file generated by the User Manager upgrade Script in the Image-Group-Files directory located in your user\_manager directory.

## To run the Collection Manager Upgrade Script

1) Open a database script editor and connect to your **Collection Manager** database.

### Microsoft SQL

- SQL Query Analyzer or isql

### Oracle

- SQLPlus or SQLPlus Worksheet

**NOTE:** To run the Upgrade script you must have the Oracle "Resource" permission. This permission will only be required during the upgrade process and can be removed after the script has been run. The script creates several sequences and triggers in order to autonumber some columns in several temporary tables. These are not required after the upgrade process.

2) Open the appropriate upgrade script for your database version.

**Table 9: Locations for the Collection Manager 4.1 - 5.0 Upgrade Script**

Database	Location
MSSQL	CD3_Upgrade\utilities\sql\MSSQL\41_to_50\41_to_50_Collection_MSSQL.sql
Oracle	CD3_Upgrade\utilities\sql\Oracle\41_to_50\41_to_50_Collection_Oracle.sql

3) Read the instructions at the top of the file.

4) Run the script.

**NOTE:** The upgrade script can take 3-15 minutes to execute, so be patient.

5) Please report any errors to Luna Technical Support.

**NOTE:** Depending on your database, the upgrade script may produce errors. PLEASE CONTACT LUNA regarding all errors for guidance on how to correct the database.

## Running the Upgrade Installer

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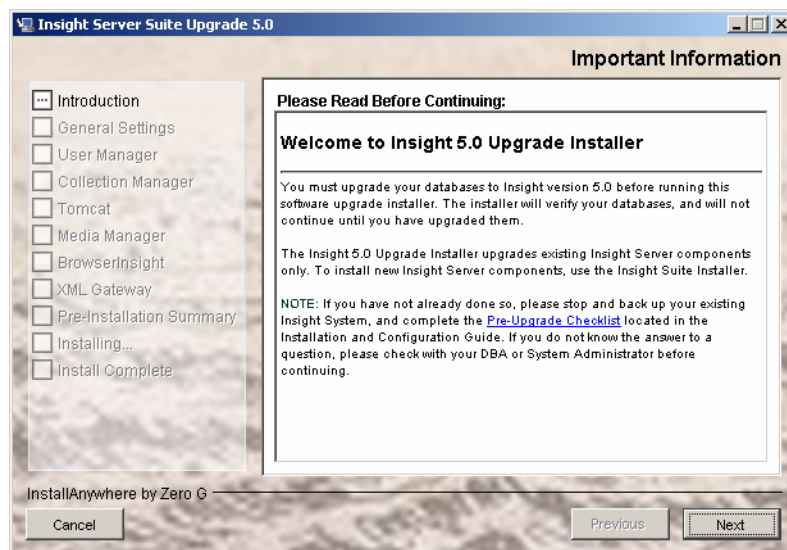
The upgrade installer is designed to help you locate and upgrade your existing installations, port the current versions into the 5.0 structure, and upgrade your configuration files. The Upgrade Installer will also install and configure Tomcat 5 with options needed to run the Media Manager.

**NOTE:** There is no manual upgrade for 5.0, please use the Upgrade Installer.

## Running the installer

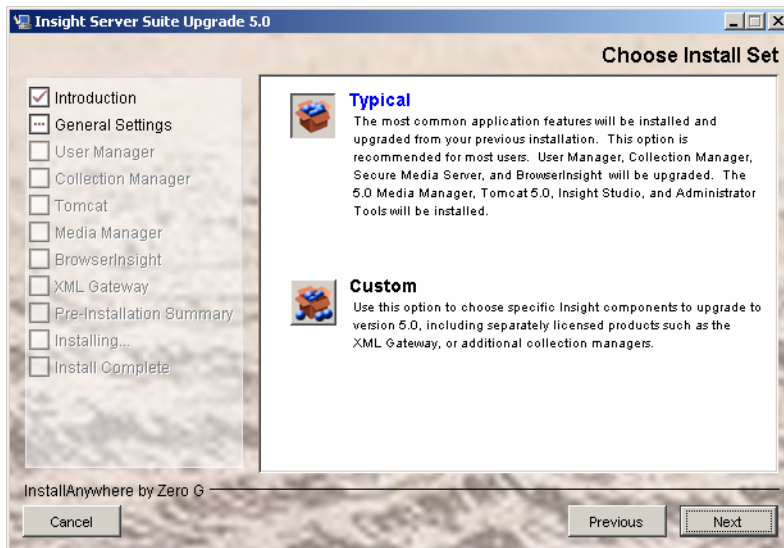
To run the installer, double-click on the upgradeServerSuite executable appropriate to your platform. Please note, the installer is around 100MB, so it may take a few minutes to initially load. The installer is GUI-based and must be run in a graphical environment.

**NOTE:** The installer is GUI-based and will require an X-Windows environment on any UNIX based system.



## Selecting the Components to Upgrade

The Insight Suite Upgrade Installer allows you to perform either a “Typical” or a “Custom” installation.

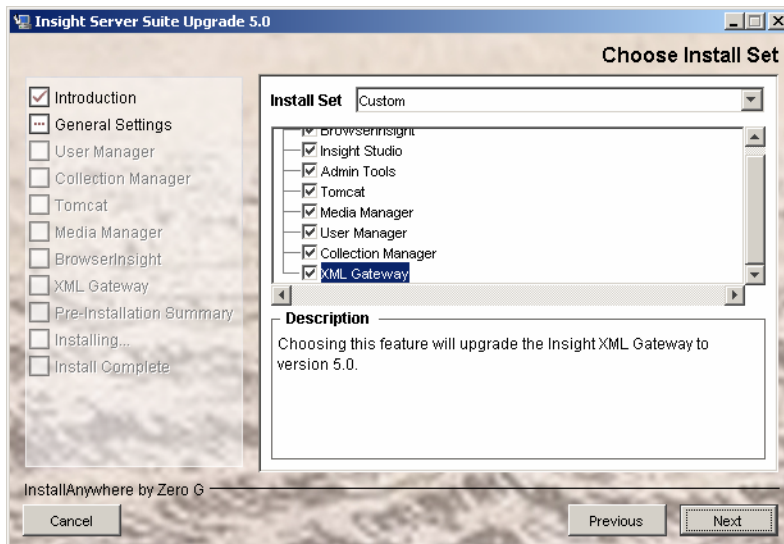


### Performing a Typical Installation:

A “Typical” upgrade includes upgrading the User Manager, Collection Manager, Media Manager, an optimized version of Tomcat, and BrowserInsight.

### Performing a Custom Installation:

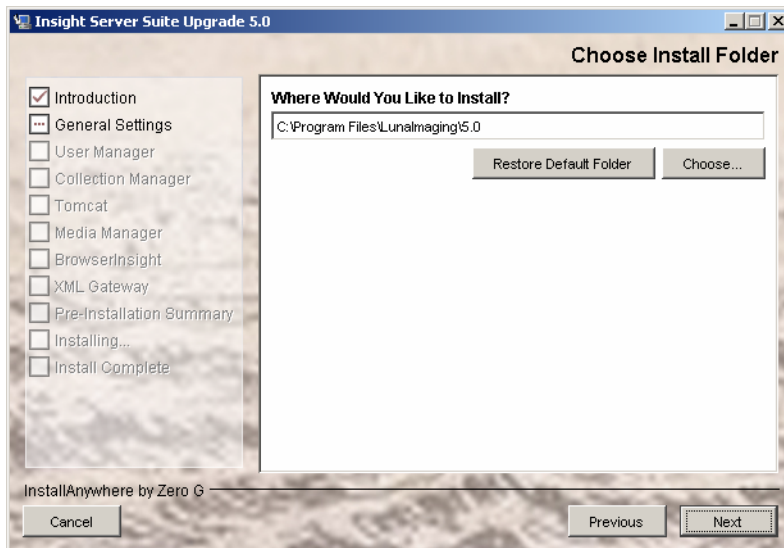
A “Custom” installation allows you to choose a subset of the above components to upgrade / install and allows the upgrade of the XML Gateway.



**NOTE:** If you would like to upgrade more than one Collection Manager, you will need to run the Upgrade Installer separately for each additional Collection Manager and perform a “Custom” installation.

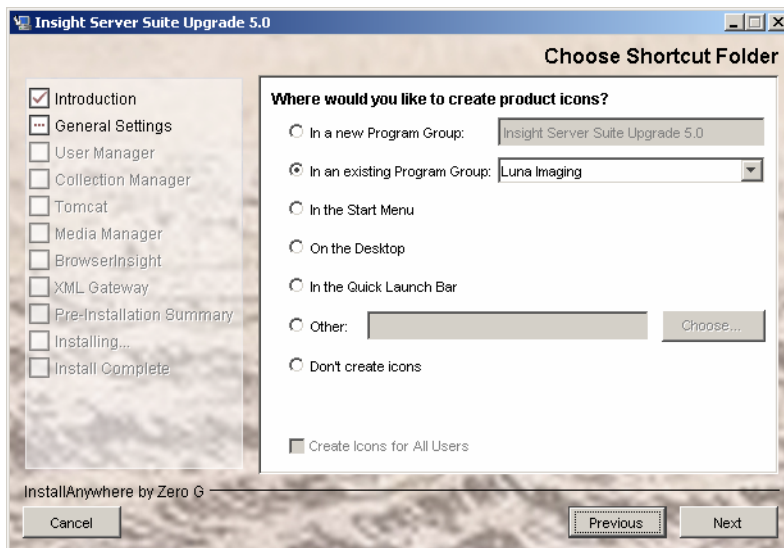
## Choosing Installation Location

The installation of the Insight server components can take up to 300MB, please plan accordingly when installing the server components.



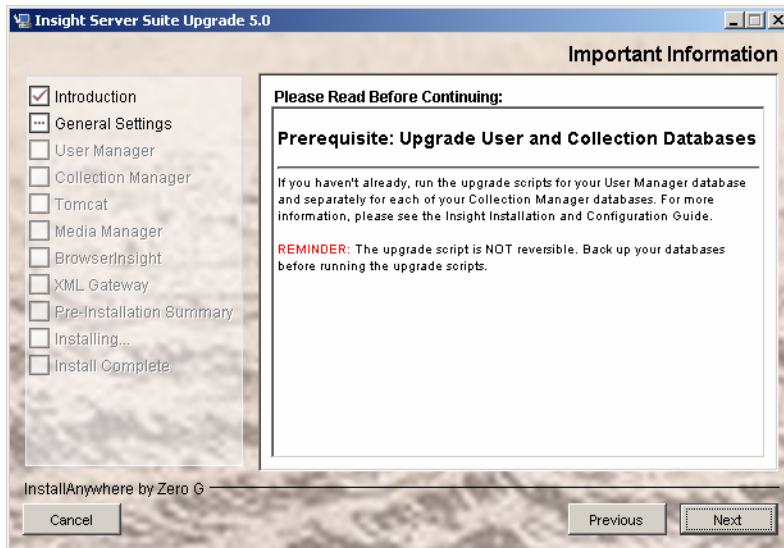
## Creating a shortcut folder

The installer can create a series of links to the server components and documentation on install. On Windows, the default is a “Luna Imaging” program group.



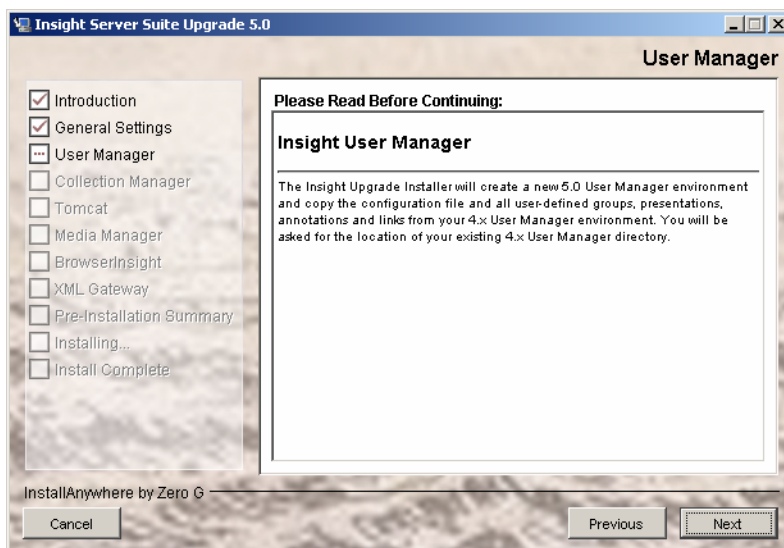
## Prepare your Databases

Before you run the installer, please run the Insight Database Upgrade Scripts. The installer will complete the database upgrades and will not run unless the database has been properly upgraded.



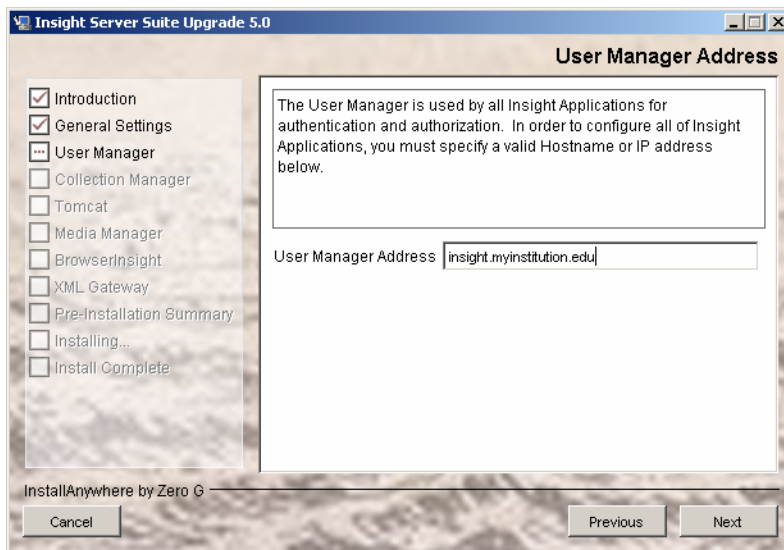
## Upgrading the User Manager

The User Manager upgrade will install the 5.0 version of the Insight User Manager, and utilize the existing configuration information from your 4.x User Manager.



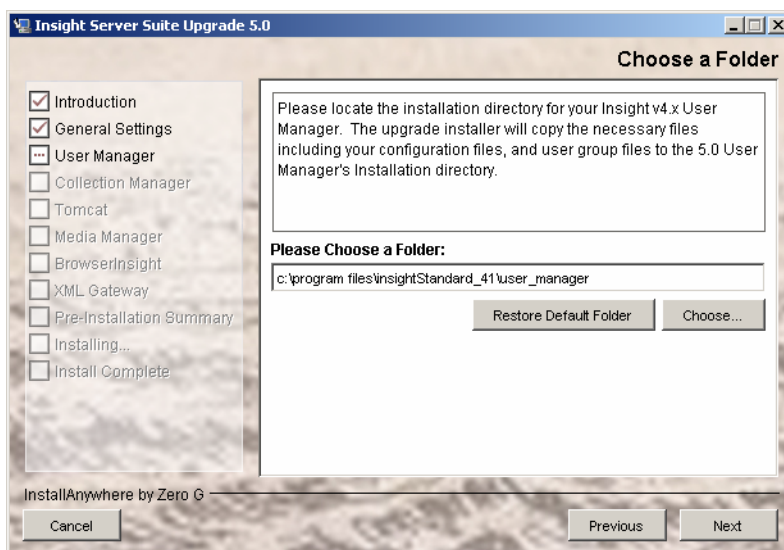
## Specify your User Manager Address

During the installation process, the installer will use your User Manager address to configure components, please provide your User Manager address.



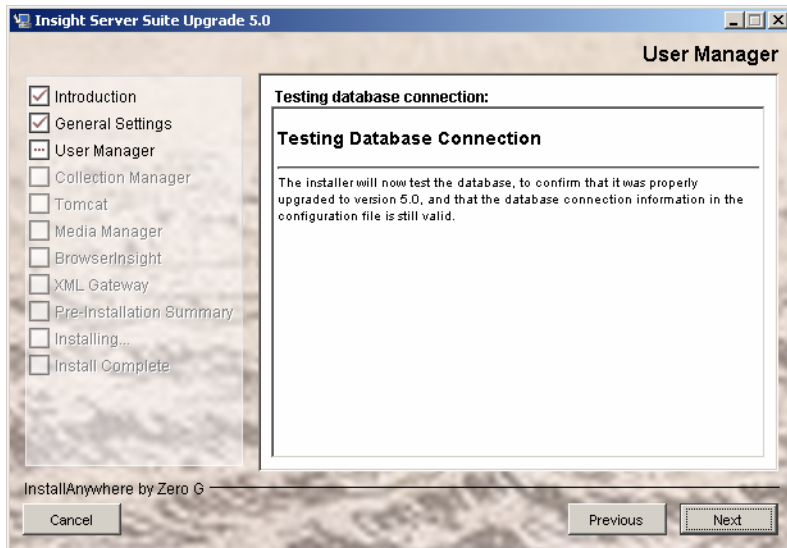
## Specify your Insight 4.x User Manager Directory

Please specify for the installer where your 4.x User Manager Directory is located, it will read and copy your configuration files and “group-files” from the 4.x User Manager into your new 5.0 installation.



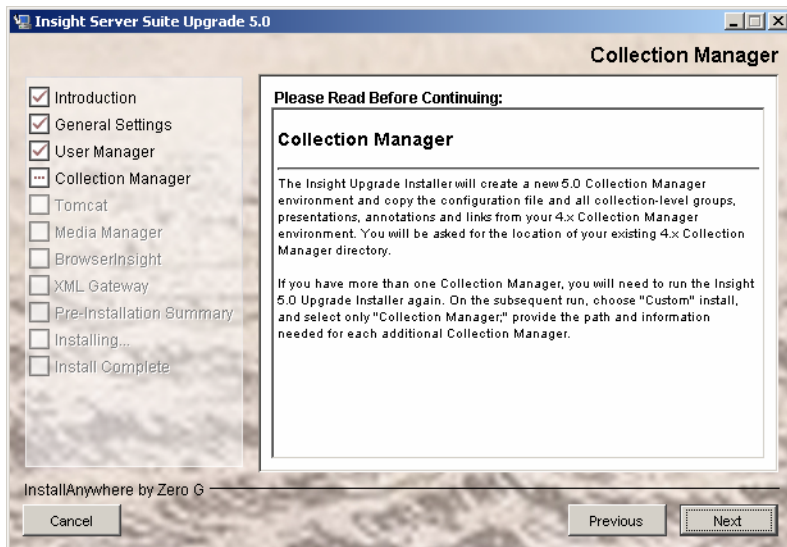
## Verifying Successful Database Upgrade

The installer will now verify that your User Manager database has been upgraded to 5.0 based on the information contained in your version 4.x User Manager.



## Upgrading the Collection Manager

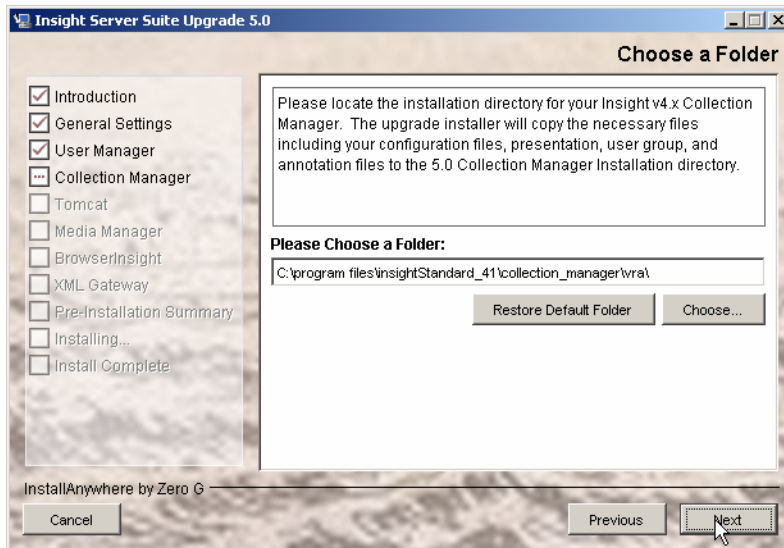
The Collection Manager Upgrade will install the 5.0 version of the Insight Collection Manager, and utilize the existing configuration information from your 4.x Collection Manager.



## Specify your Insight 4.x Collection Manager Directory

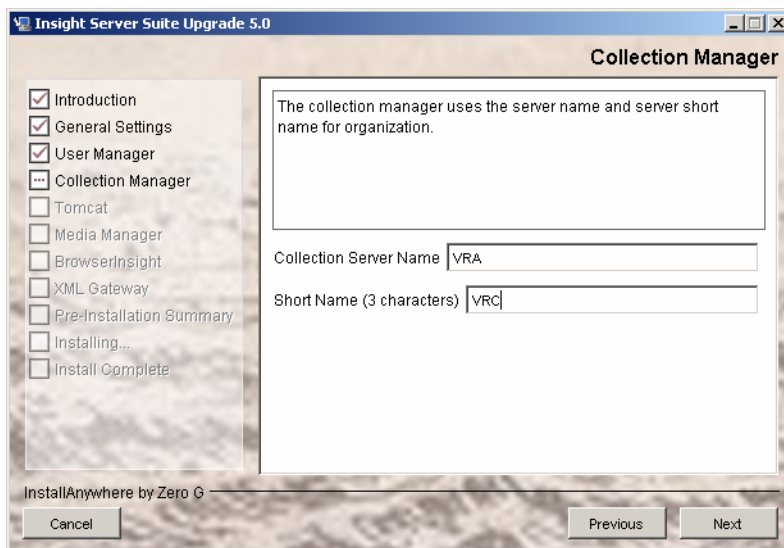
Please specify for the installer where your 4.x Collection Manager Directory is located, it will copy your configuration files, "group files", "presentation files", "Link Files" from the 4.x Collection Manager into your new 5.0 installation.





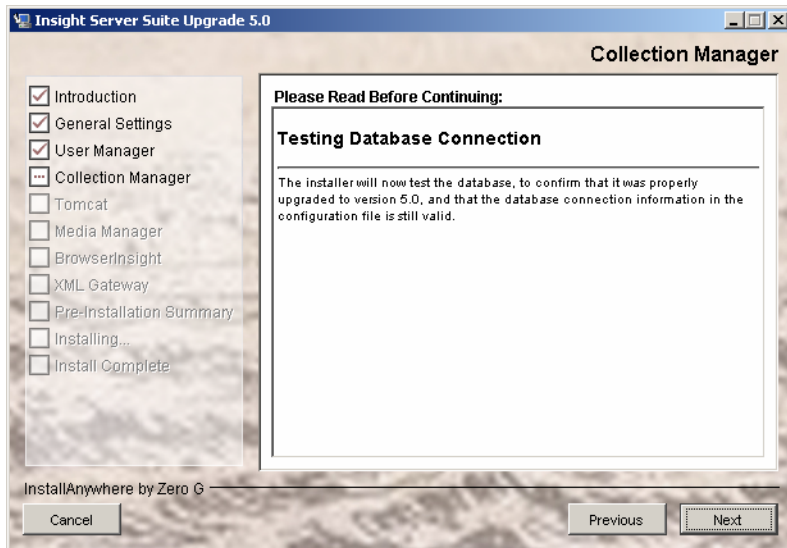
## Specifying a Collection Short Name and Server Name if you haven't Already

Please confirm your collection name and short name. If you have specified it already in your configuration files, the values should be pre-populated. This information will be used to configure your 5.0 Collection Manager.



## Verifying Successful Database Upgrade

The installer will now connect to your 5.0 Collection Manager database, test your configuration and finish up the upgrade.

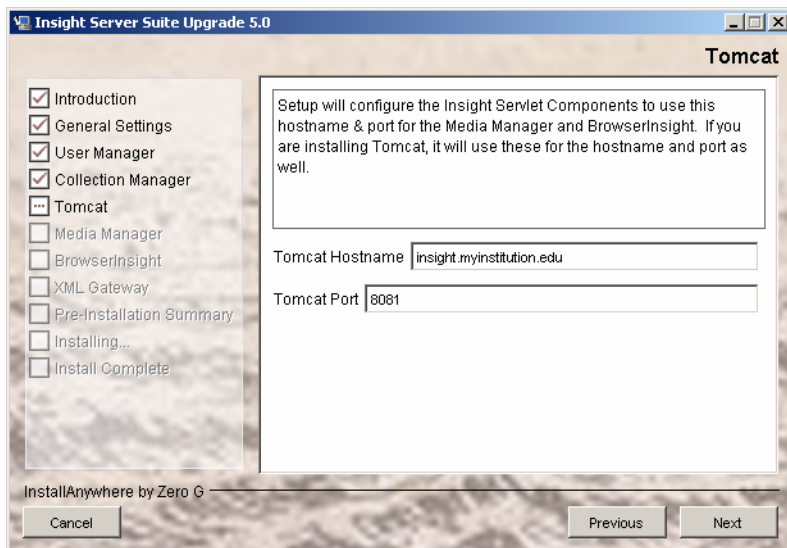


## Upgrading Multiple Collection Managers

The upgrade installer needs to be run against your Collection Manager. If your installation contains more than one Collection Manager, the upgrade installer needs to be run once against each of them in order to bring them all up to version 5.0.

## Installing the Bundled Version of Tomcat 5

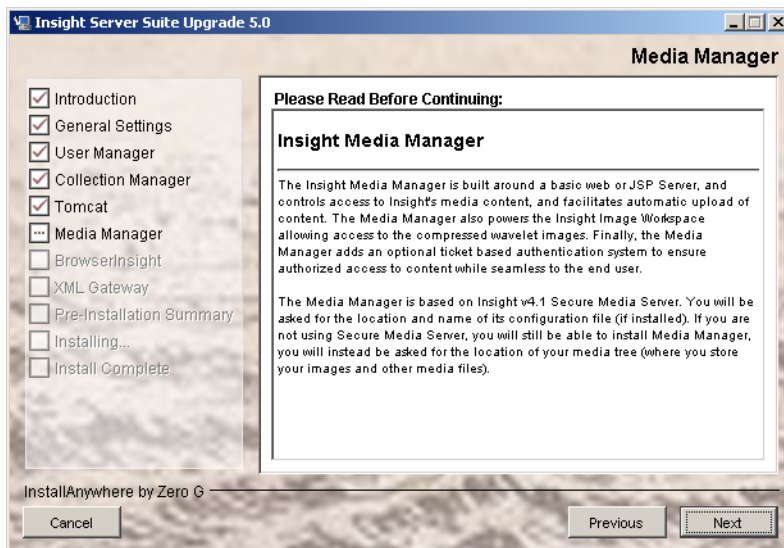
Insight is bundled with a customized version of Apache's Tomcat 5.0.19. This version of Tomcat has been configured with most of the default servlets disabled and a customized version of the configuration files.



**NOTE:** If you are planning to use your own version of Tomcat or Resin, enter the HOSTNAME and PORT for your version of Tomcat or Resin, the installer will configure all Insight Components with this information. The installer will use this information to configure the Collection Manager, BrowserInsight and other components.

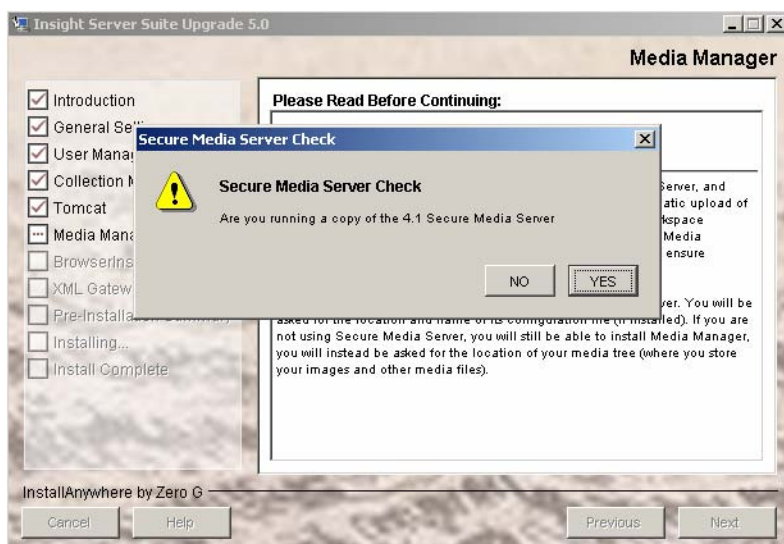
## Upgrading the Secure Media Server & Installing the Media Manager

The 4.x Secure Media Server has been fully integrated into the 5.0 Media Manager. If you installed the 4.x Secure Media Server, provide the installer with the mediaSecurity.dat configuration file and the installer will upgrade the Secure Media Server for you.



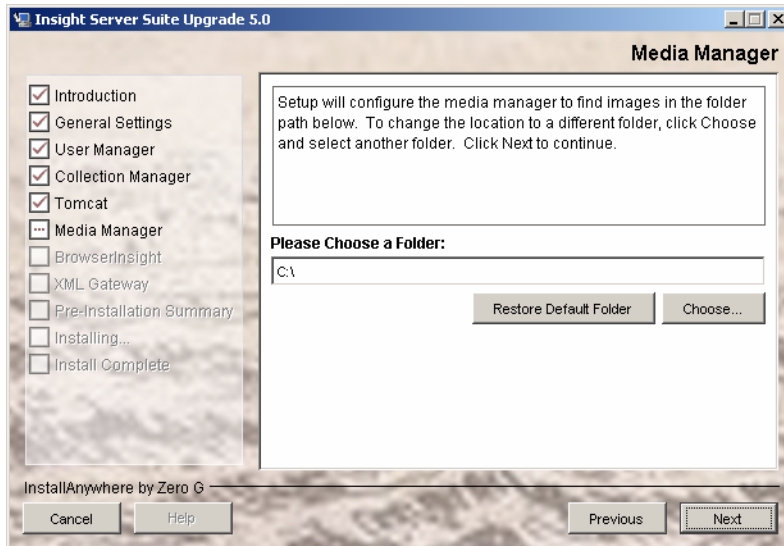
## Installing the Media Manager

If you are not using the 4.x Secure Media Server, the installer will allow you to install the 5.0 Media Manager. The Media Manager includes support for JPEG2000 files as well as integrated upload of media during media processing.



## Specifying the Secure Media Server Configuration File

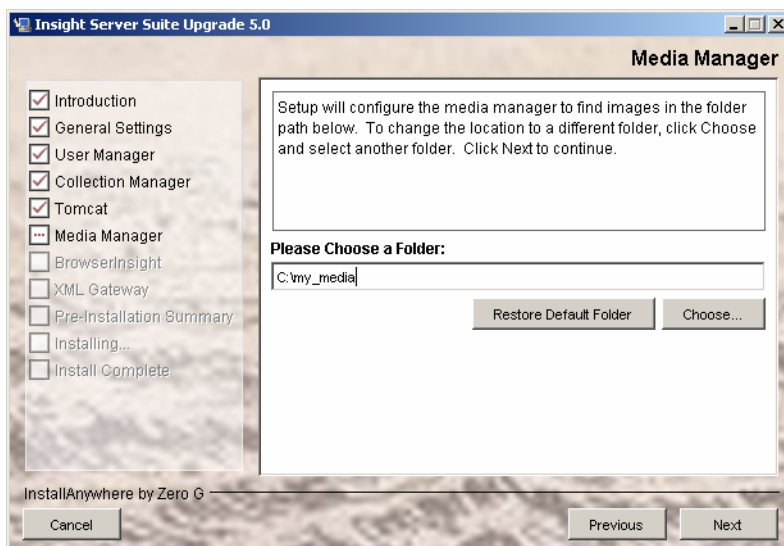
If you installed the 4.x Secure Media Server, please specify the location of your mediaSecurity.dat configuration file. The server will upgrade the Secure Media Server to a 5.0 Media Manager.



## Specifying the Media Directory

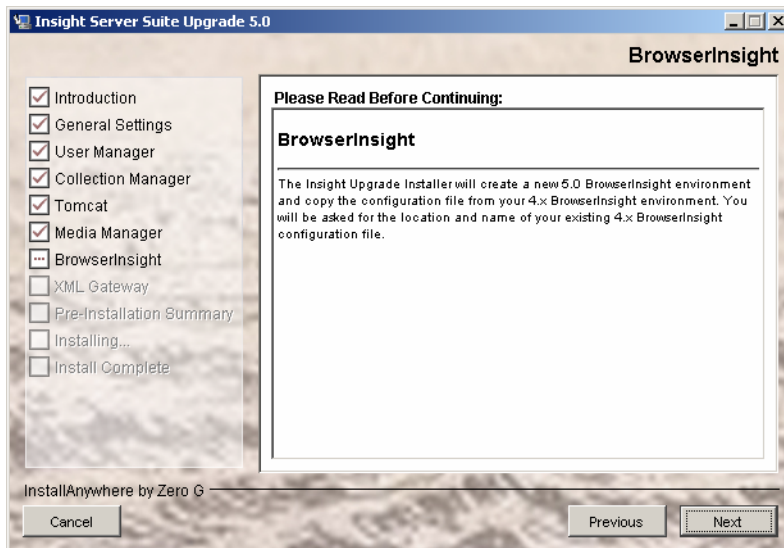
Please specify the directory you will use for storing media processed in Insight. Select your base directory where your images are stored. This directory will contain your Size0, Size1, Size2, Size3, Size4 and SIDs directories and will be where the media manager stores JPEG2000 Files as well.

**NOTE:** If your Image storage location is more complex than this or you have multiple storage locations for various collections, please contact Luna Imaging's support department for advice on these advanced configurations.



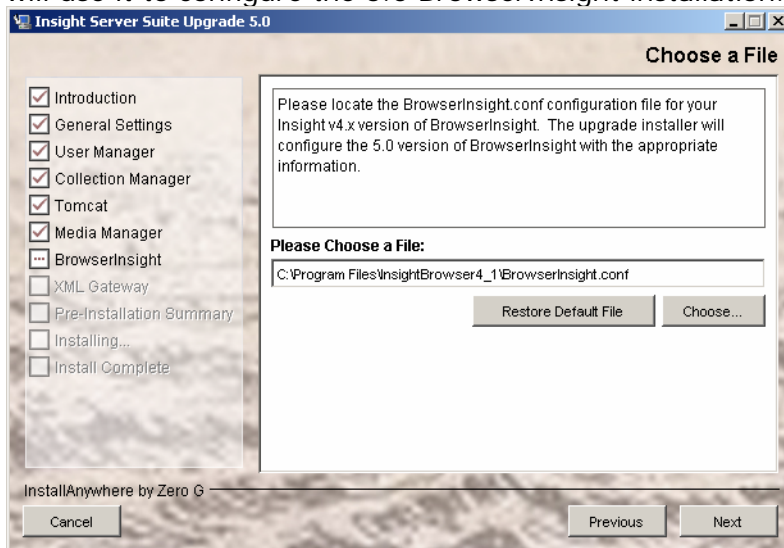
## Upgrading BrowserInsight

The Upgrade Installer will copy your 4.x BrowserInsight configuration files and other information to the 5.0 installation.



## Locate your BrowserInsight.conf

Specify the location of your 4.x BrowserInsight.conf configuration file. The installer will use it to configure the 5.0 BrowserInsight installation.

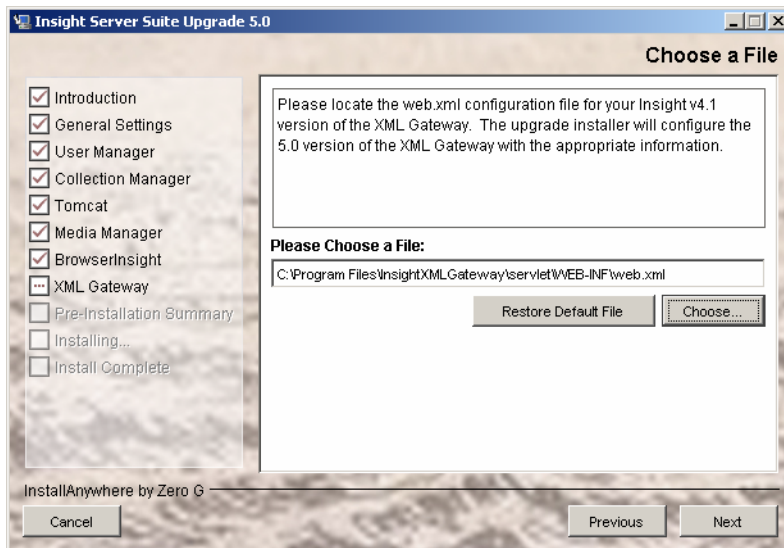


## Upgrading the XML Gateway

If you installed the 4.x Insight XML Gateway, the upgrade installer will enable you to upgrade the XML Gateway to 5.0.

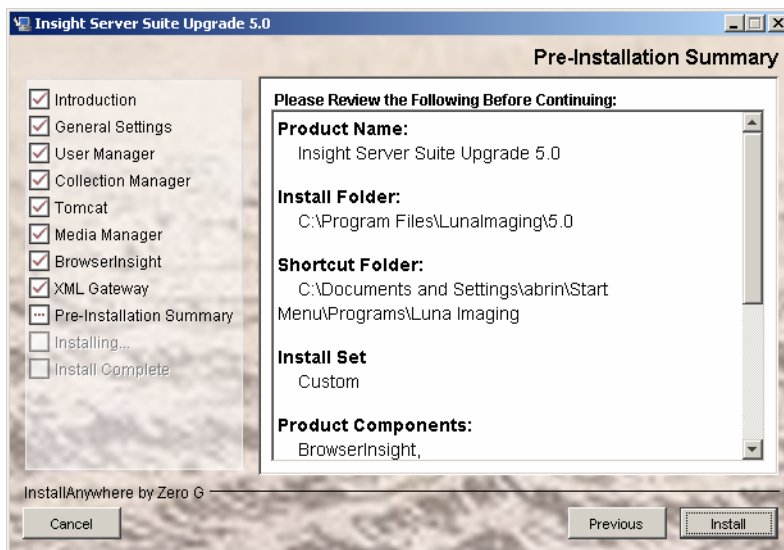
## Specifying the Location for the 4.1 XML Gateway Configuration File

Please specify the location of the 4.1 XML Gateway Configuration File (web.xml). It should be located in the servlet/WEB-INF directory of your 4.1 installation directory.



## Verify Installation Choices

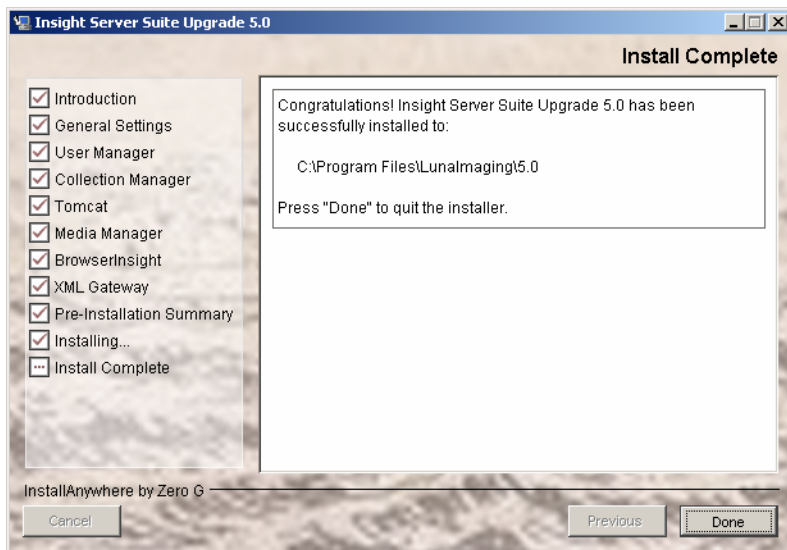
Once you have completed the configuration of the 5.0 upgrade installer, please review your choices before continuing.



## Running Upgrade

The upgrade installer will now install and configure the Insight 5.0 server components with all of your 4.x configuration information.





## Licensing

If you are planning on continuing your upgrade all the way to the latest version of Insight (currently version 6.2), please ignore this section and review your licensing options from the previous (5.0 to 6.2) upgrade section. Otherwise, if you did not complete registration during the version 5.0 installation and would like to register online, you can access the form at the following URL.

<http://www.lunaimaging.com/support/register/50.html>

Once you have completed the form with your contact information, Luna will contact you with a license key for your product. If you have any questions, please contact <mailto:licensing@luna-img.com> or call (800) 452-LUNA.

Keyed Applications or Components:

- Insight User Manager
- Insight Collection Manager
- Personal Insight Manager
- BrowserInsight
- XML Gateway

## Installation Errors

If your installer has an error during the install process, you will receive a message in the installer panel. Press the "Done" button to close the installer, then go to the installation directory to review the installation log (Insight\_Server\_Suite\_Upgrade\_5.0\_InstallLog.log). This log will indicate where a failure may have occurred. If you are unsure about what the error reported, please forward the report to Luna Imaging's Support department.

## Installing new Components

To install new components such as Personal Insight or the XML Gateway, run the Insight Suite Installer, located on CD1 of the 5.0 CDs.

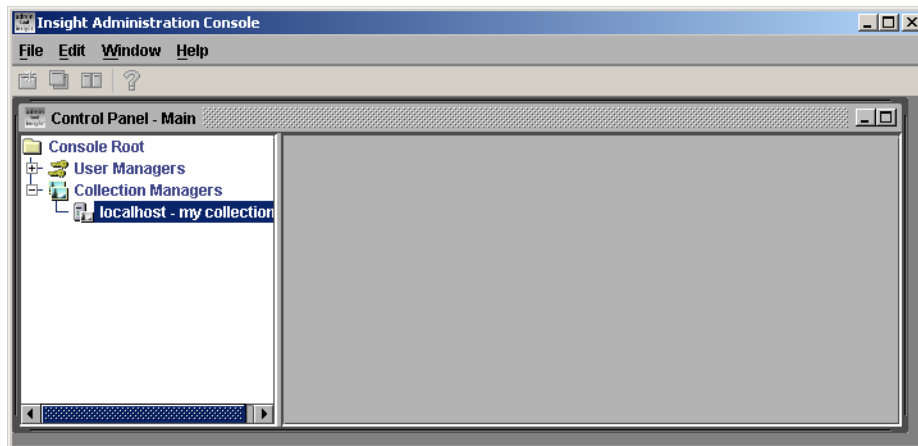
## Running the Insight Administrator Tools and the Indexer

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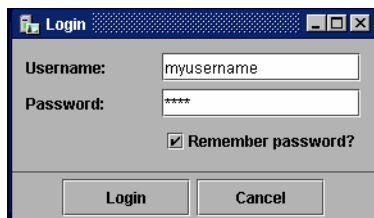
Once the upgrade installer has completed, you will need to run 5.0's indexer (part of the Insight Administrator Tools) to complete the upgrade of your database. The 5.0 Insight Administrator Tools were automatically installed with a "Typical" installation.

### To run the indexer:

- 1) Open the Insight Administrator Tools. The 5.0 Insight Administrator Tools are installed in the "AdminTools" directory of your 5.0 Installation Directory.
- 2) The installer should have created an entry for each of the insight server components you installed. For each collection, right-click on the collection node to connect.



- 3) Enter your administrative username and password.



- 4) The 5.0 Administrator Tools has a changed layout. For each Collection Manager, functions have been separated into three categories:

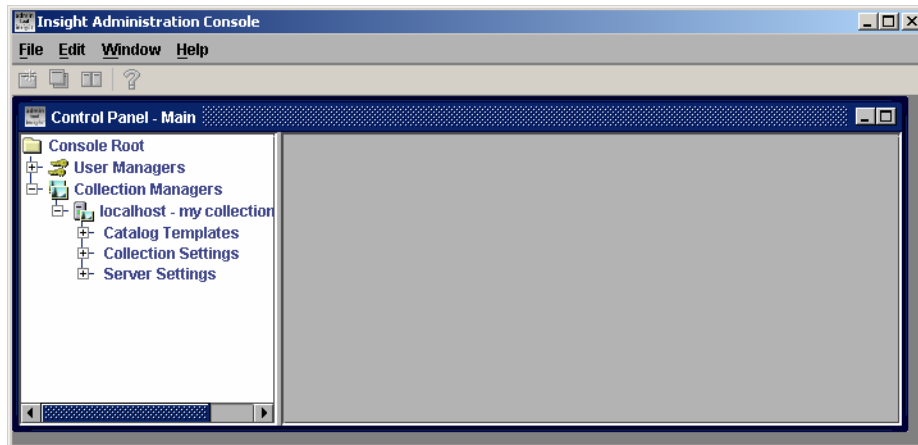
**Catalog Templates:** which include Fields, Record Fields, and other data model specific information.

**Collection Settings:** which includes information on configuring specific

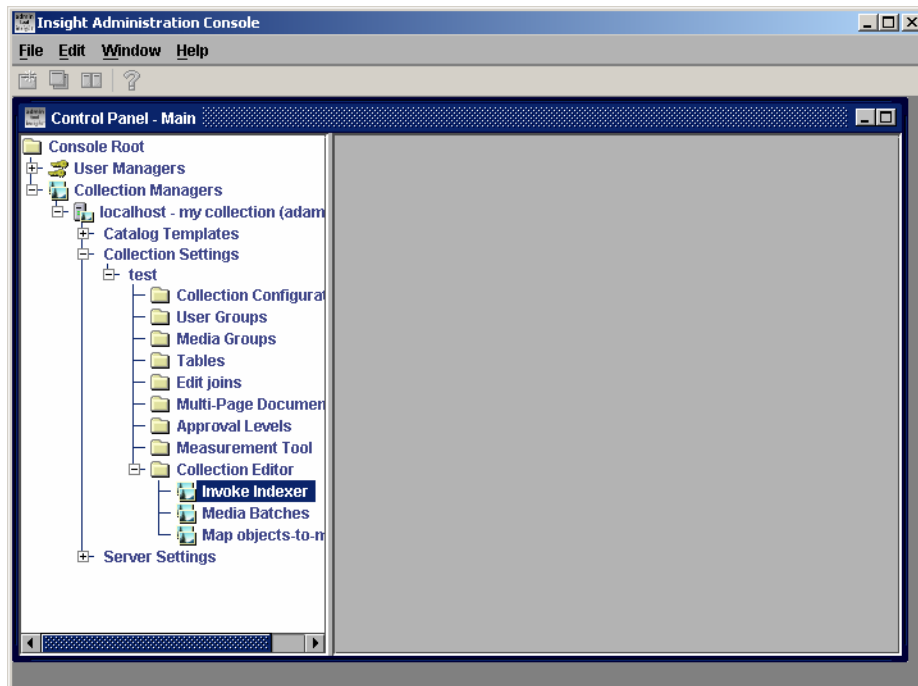


collections within the Collection Manager.

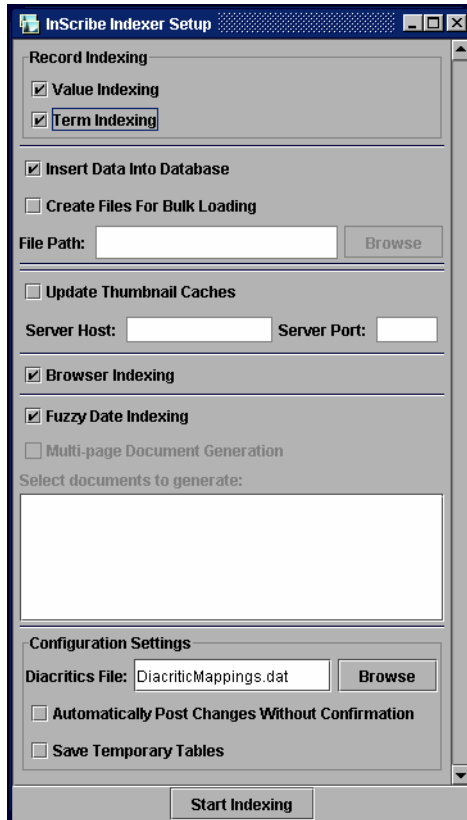
**Server Settings:** which includes configurations that affect the entire Collection Manager.



- 5) Open the "Collection Settings" node, and open the node for your collection.



- 6) The indexer functions are located within the "Collection Editor" section of the collection area. To run the indexer, right-click on "Invoke Indexer" and choose "Run Indexer".



- 7) Choose "Value indexing" and "Term Indexing", and run the indexer. If you normally run the indexer using "Bulk Loading Files," you may specify that as well.

**NOTE:** Using Bulk Loading Files can drastically increase the speed of indexing. If you are not currently using bulk loading files, we suggest that you index normally for the initial 5.0 index. Once your 5.0 Installation is complete, please investigate using bulk loading files in the future. For more information on using the Bulk Indexer, see the Indexing Section of the "Insight Administration Guide" for more information.

- 8) Click "Start Indexing" to run the indexer.
- 9) If you are using Oracle as your database, you should now regenerate statistics for all Insight Tables.

## Testing your 5.0 Upgrade

When the Indexer has completed, test the 5.0 Upgrade before you upgrade to the new Media Manager. To test the upgrade, we'll start each of the server components in "console mode" and then login with the Java Client. Then, we'll start Tomcat and BrowserInsight and login with the Browser. For instructions on testing your server components, please see Starting the Insight Server Components for the First Time (in console mode) on page 204.

## Configuring your Collections for Access using Insight Studio

Insight Studio is a powerful tool to help you manage and build collections. It can help you perform data import, media processing, and other common tasks. However, before you can manage collections in Insight Studio you will need to configure your Collection Managers and User Manager to enable access.

### To enable access you will need to:

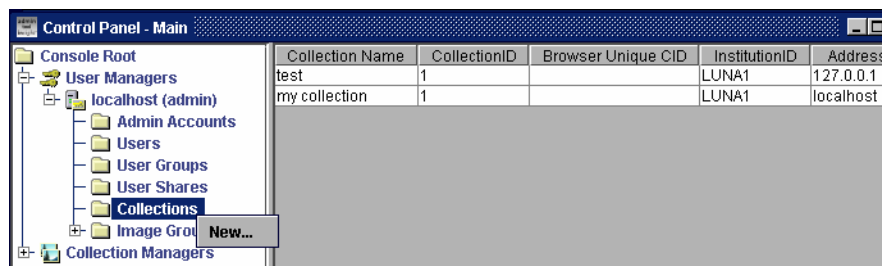
- a) Define a Master Server Entry in your User Manager for each collection.
- b) Check that you have an administrative user in your collection that has the privileges to login to Studio.
- c) Ensure that your Collection's administrative username and password map to a valid user on your User Manager.

## Defining a Master Server Entry

Insight 5.0 introduces two new Collection Type entries in the User Manager. Master Server represents physical Collection Managers and are used by the Insight Java Client and Insight Studio to group Collection Managers. Master Server entries are also used to tell Insight Studio which Collection Managers it can connect to. Personal Collection entries are used to identify Personal Collection Servers for the Insight Java Client.

### To define a Master Collection Entry:

1. Open the Insight Administrator Tools.
2. Connect to your User Manager.
3. Click on the Collections node and identify the Collection(s) that you wish to grant Insight Studio Access to. You may want to "Edit" these so you can see the settings more easily when you create the "Master Server Entry."
4. Right-Click on the Collections entry and choose "New."



5. To define a master node, you must identify the following:
  - a. Specify a Collection Name (this is displayed in the Collection Selection Panel).

- b. Change the Collection Type to Master Server.
- c. Specify the Institution ID (this should be the Institution ID for your current collection).
- d. Specify the Server Address (the DNS Name or IP Address of your Collection Manager).

**NOTE: DO NOT USE LOCALHOST.**

- e. Specify the Server Port (the Port for your Collection Manager, check your InsightServer.dat to confirm if you are unsure).

6. Save your Collection Entry.
7. Repeat for any other Collection Managers you want to manage.

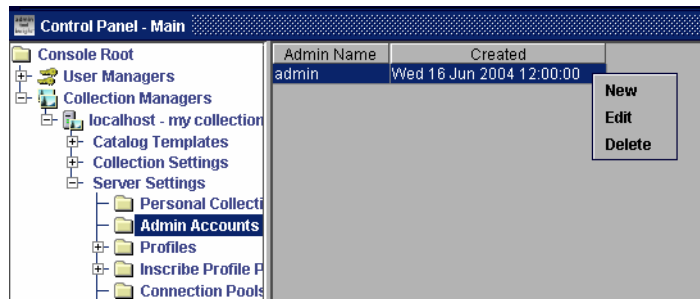
## Confirming you have the Administrative Rights to Manage a Collection with Insight Studio

Because users can make administrative changes in Insight Studio, you must limit access to specific users in the Insight Administrator Tools.

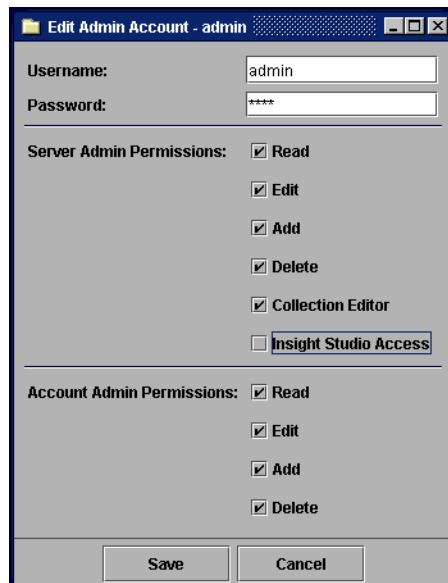
### To enable access to Insight Studio:

1. Open the Insight Administrator Tools.
2. Connect to the Collection Manager you want to manage.

3. Open up the Server Settings node, and click on the "Admin Accounts" node.
4. Right click on the entry for the administrative user you wish to manage and choose "Edit."



5. To enable Insight Studio access, click the "Insight Studio Access" checkbox.



6. Luna also suggests changing your password (especially if it is still using the default).
7. Save.

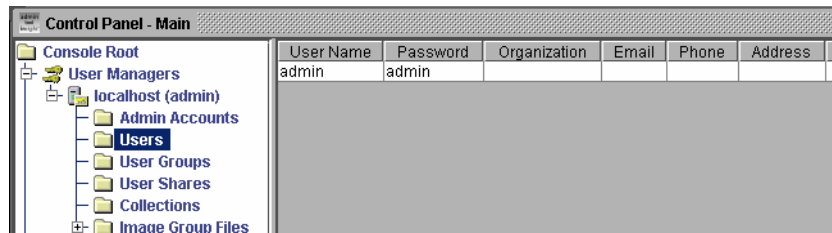
## Adding the User to the User Manager

Once the user has the appropriate permissions in the Collection Manager, you must confirm that there is a matching user in the User Manager.

To confirm that the user is defined in the User Manager:

1. Open the Insight Administrator Tools.
2. Connect to your User Manager.

3. Open the "Users" node and look for a matching username.



4. If you do not find a matching username, for your administrative user, add one by right-clicking on the "Users" node and choosing "New."
5. Enter the username and password which match the administrative user in the Collection Manager.

Username:

Password:

First name:

Last name:

Organization:

E-mail:

Phone:

Address:

City:

State:

Postal code:

Country:

Available Authentication Groups: test-1-ADMIN

Assigned Authentication Groups:

> <

Save Cancel

Also, enter a First Name and Last Name.

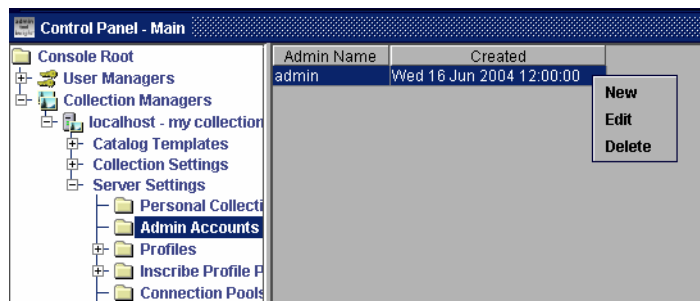
6. Insight Studio only verifies a valid username and password on login, so you do not need to assign Authentication Groups.
7. Press Save.

## Enabling a User to Manage Users with Insight Studio

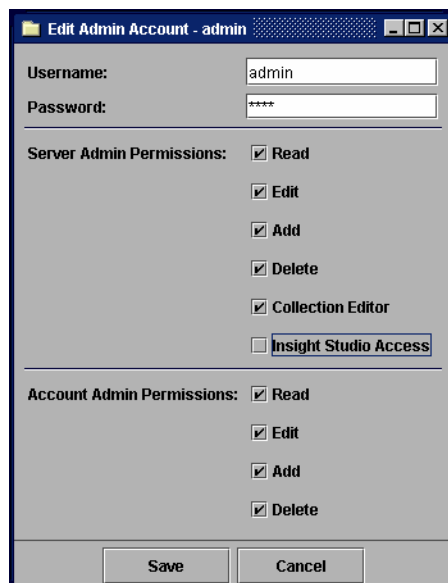
If you would like to enable a user to manage Users on the User Manager, you must confirm that there is a user in the User Manager's list of administrative users which matches a user in the user list.

### To enable access to Insight Studio:

1. Open the Insight Administrator Tools.
2. Connect to the User Manager you want to manage.
3. Open up the "Admin Accounts" node.
4. Right-click on the entry for the administrative user you wish to manage and choose "Edit."



5. To enable Insight Studio access, click the "Insight Studio Access" checkbox.



6. Luna also suggests changing your password (especially if it is still using the default).
7. Save.

8. Confirm that there is a matching user in the User List (please see “Adding the User to the User Manager” on page 193 for more information).

## Upgrading from IIS or Apache to the Insight Media Manager

---

The Media Manager is a powerful addition to Insight. It can upload images from Insight Studio and Personal Insight. In order to take advantage of the ability to upload media in Insight Studio, Personal Insight, or Inscribe, it is necessary to use the Media Manager as it supports secure upload from the client.

### **To configure a collection to use the Media Manager, you will need to:**

- a) Update your Insight Collection Profiles to use the Media Manager.
- b) Configure the Media Manager to access your existing media.
- c) Optionally configure the security settings for the media.

## Updating your Insight Collection Profiles to use the Media Manager

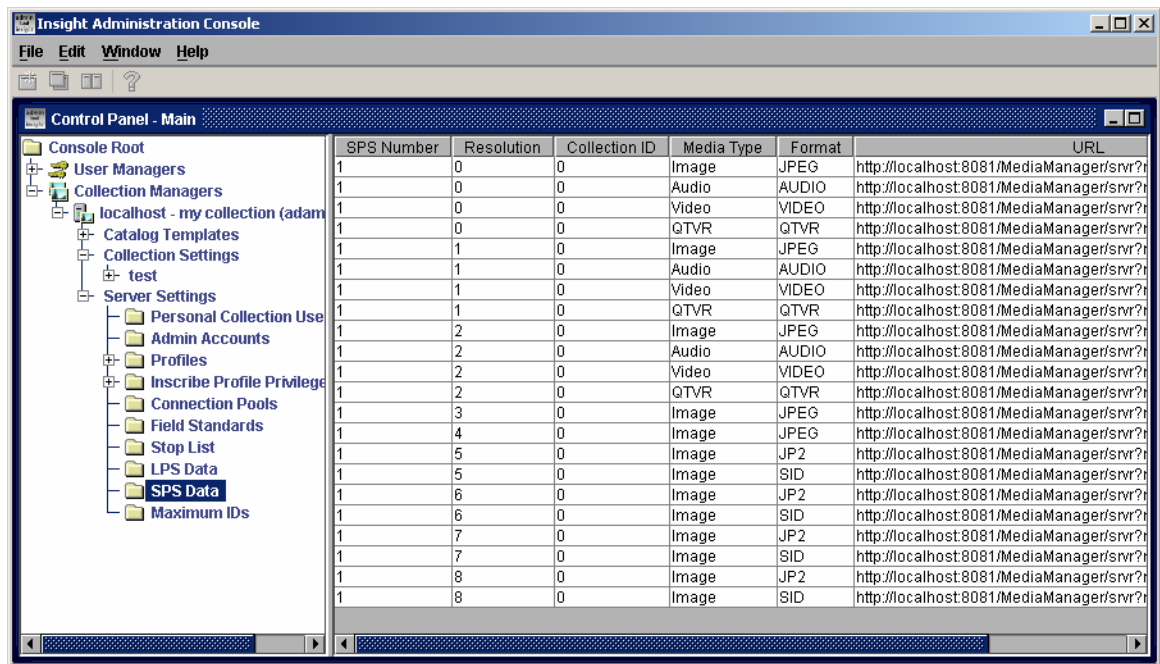
The 5.0 Database Upgrade will have already installed and configured a new set of SPS Settings (base URLs for media) which point to the 5.0 Media Manager. All that's needed is to update your existing profiles to use the new SPS.

### **To confirm and configure the new set of SPS Values:**

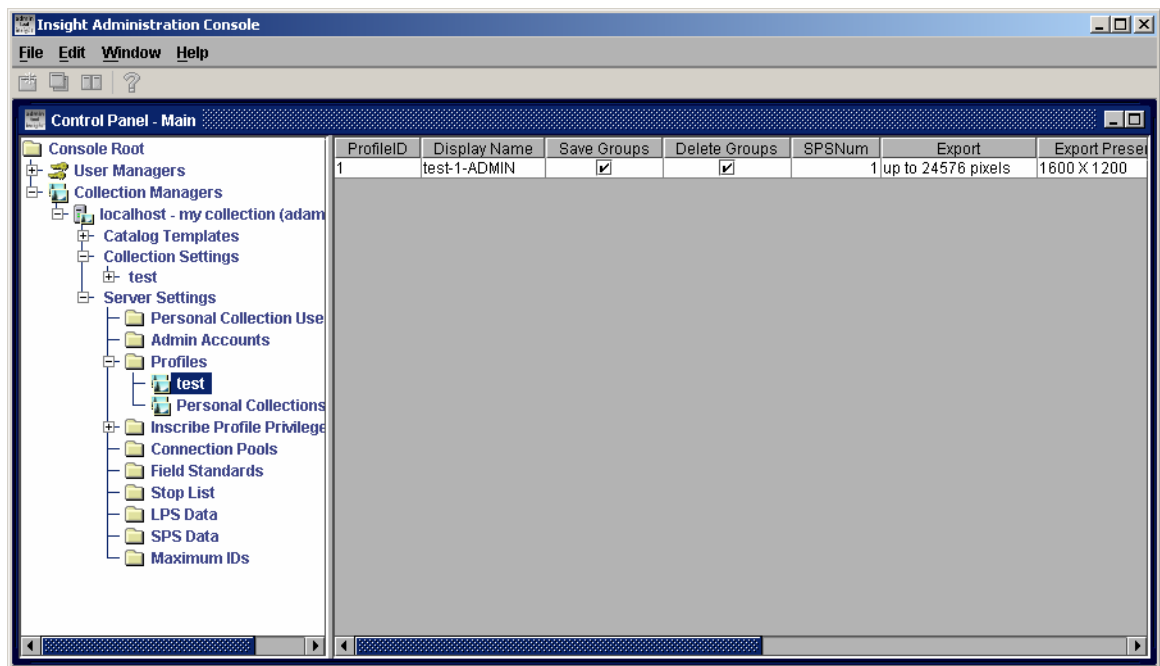
- 1) Open up the Insight Administrator Tools and connect to your Collection Manager.
- 2) Open up the “Server Settings” node, and select “SPS Data.”
- 3) Look for a new Set of SPS entries.

The Upgrade Installer will have added an extra set of SPS values that point to the Media Manager. They should start with the hostname and port that you specified for Tomcat when you ran the Upgrade Installer. Identify the “SPS Number” for the 5.0 Media Manager (you will need this in the next step).

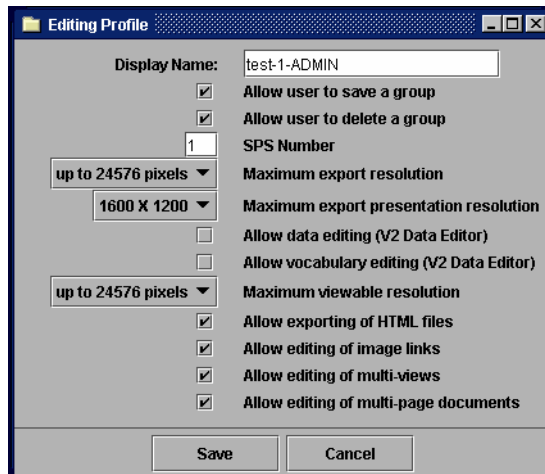




- 4) Once you have identified the SPS Number for the Media Manager, go to the “Profiles” node of the “Server Settings” area.



- 5) For each profile you have defined:
- Right-click on the profile name and select edit.



- b. Change the "SPS Number" in the profile entry to match the "SPS Number" you identified above.
- c. Press save.
- d. Repeat for all of the other profiles for your collection.

## Using the Media Manager with content from Multiple Legacy Collections

If you would like to configure the Media Manager to use content from multiple legacy collections you have two options:

- a) You can move the content and adjust the SPS values so that content is accessible using the same media root directory.

**NOTE:** Only consider this configuration if you are not currently using Insight's media repository for other applications (such as providing images for websites).

- b) You can configure a separate instance of the Media Manager. Please contact Luna for more instructions on configuring a separate instance.

## Configure an Insight Collection Manager to use the Insight Media Manager

During the Upgrade process, your InsightServer.dat and BrowserInsight.conf files have been modified to support the Insight Media Manager. Below are the changes that have been automatically applied. You will not need to do anything here. This information is provided for reference only.

To enable Insight Media Manager support on your Insight Collection Manager:

- 1) Open the InsightServer.dat file located in Collection Manager installation directory.
- 2) Turn on Media Security:

- a. Locate the following lines:

```
# MediaSecurityEnabled - Turns Media Manager Support on or off.  
  
# Note: Enabling the Media Manager will have no effect  
# unless the media SPS entries are directed to a correctly  
# configured Media Manager. (1= ON; 0=OFF)  
  
MediaSecurityEnabled = 0
```

Set MediaSecurityEnabled to 1. To disable the Insight Media Manager, set the property to 0.

**NOTE:** Enabling the Insight Media Manager will have no effect unless the media SPS entries are directed to a properly configured Manager. These configurations will be covered later in the document.

- 3) Define the Location of the Media Manager:

- a. Locate the following lines:

```
# MediaSecurityServletUrl - The base URL for the  
# Media Manager.  
  
# i.e.  
MediaSecurityServletUrl=http://media.myserver.com:8081/Media Manager  
/srvr  
  
MediaSecurityServletUrl =
```

- b. Set the **MediaSecurityServletUrl** property to the base URL for the Insight Media Manager. This servlet URL is used to establish the initial session ticket.

## Configuring BrowserInsight to use the Insight Media Manager

Before configuring BrowserInsight to use the Insight Media Manager, ensure that your collection contains SPS references to the Insight Media Manager. For more information, please review the preceding section.

The BrowserInsight configuration file changed in 5.0 to support greater flexibility. Besides collection entries, which represent database connections for specific collections, BrowserInsight.conf contains entries for Server entries (which represent a Collection Manager or Personal Insight Manager). Insight 5.0 also no longer requires a BrowserUniqueCID entry in the User Manager's collection table.

For existing collections, leave your collection and BrowserUniqueCID entries as they were in 4.1 (as any change will break all existing Remote Launch Strings to that collection). For new collections, use the "Server" method without the BrowserUniqueCID.

## Update your BrowserInsight Configuration File

To update a server or collection to use the Insight Media Manager, locate your BrowserInsight.conf and open it in your preferred text editor.

- 1) Locate the connection properties for the collection you are enabling Insight Media Manager access. For example, if my collection is #1:

```
Collection.1.insightDBDriver = sprinta
Server.1.connectString =
www.lunaimaging.com:1433?database=Dalton&sql7=true&user=luna&password
=insight
# Collection.1.username      =
# Collection.1.password     =
```

**NOTE:** In this example, we have used Collection Entries in the BrowserInsight.conf (these are interchangeable with the 5.0 “server” Entries).

- 2) Set the **mediaSecurityEnabled** property to yes.

```
Collection.2.mediaSecurityEnabled      = yes
```

- 3) Set the **mediaSecurityServletUrl** property to the URL for your Insight Media Manager.

```
Collection.2.mediaSecurityServletUrl =
http://localhost:8081/Media_Manager/srvr
```

- 4) Restart Tomcat.

## Testing your new Media Manager

Once you have updated the media location, test the new Media Manager. To do this, log into the Java Client or Browser Client and try to view images.

## Enabling Media Security

Optionally, you may choose to enable media security. This will wrap the Media Manager’s current functionality with a ticket-based authentication model (meaning that all applications that request images from Insight must get a ticket from the Media Manager before they can authenticate).

To get a ticket, they must have both a private key (defined in the Media Manager and Collection Manager / BrowserInsight) and be requesting the image from a valid IP Address (defined in the Media Manager). BrowserInsight, the Collection Manager, PersonalInsight Manager and the Media Manager must have media security Enabled and configured for media security to properly work.

**NOTE:** If you wish to enable Media Security, it is enabled per instance of the Media Manager – meaning that ALL collections with access to media from that Media Manager must have Media Security Enabled.

**NOTE:** If your Media Manager and Collection Manager have different settings, they will not be able to communicate and end users will not be able to see images.

## To enable Media Security in the Media Manager

- 1) Locate the Media Manager Configuration file and open it in a text editor:
  - a. The Media Manager (mediaManager.dat) configuration file is located in the media\_manager directory of your Installation Directory.
- 2) Enable ticketing in the Media Manager.
  - a. Locate the following Line:

```
##  
# MediaSecurityTicketless - If true, the media security servlet will  
# allow requests for media which do not include session tickets.  
# Ticket parameters will be ignored.  
# The default value is false (tickets required).  
MediaSecurityTicketless = 1
```

- b. Set the **MediaSecurityTicketless** property to **0** to enable Media Security.
- 3) Define a range of IP addresses that can create tickets (this range should be limited to IP addresses of the servers hosting Collection Managers, BrowserInsight, and XML Gateways that access this Media Manager).
  - a. Locate the following lines:

```
# MediaSecurityAdminIPs - The IP addresses for computers  
# that are allowed to register security tickets to the  
# servlet.  
MediaSecurityAdminIPs = 192.168.1.51
```

- 4) Define the **MediaSecurityAdminIPs** property, setting the range of IP addresses allowed to register security tickets to the servlet. The IP address of the Collection Managers that contact this servlet must be included in the range of IPs defined for this property.

**NOTE:** Do not define the client IP's here, only define the IP's of the Collection Managers to which the Media Manager's content belongs.

**NOTE:** A valid IP Address is required, DNS address will not work.

- 5) Define the Secret Key that the Collection Manager, BrowserInsight and XML Gateway must pass to request a ticket:
        - a. Locate the following lines:

```
# MediaSecuritySecretKey - The secret key to use  
# for encrypting and decrypting ticket numbers. This  
# password must be the same in both the collection  
# manager and servlet environments.
```

```
MediaSecuritySecretKey = insight
```

- b. Define the **MediaSecuritySecretKey** property, the secret key to use for encrypting and decrypting ticket numbers. This key **MUST** be the SAME in both the Collection Manager and servlet environments. Once you have defined the secret key, note the value; you will need it when specifying the Collection Manager properties for Media Manager support.
- 6) Define the duration of a Media Manager Ticket:
  - a. Locate the following lines:

```
# MediaTicketDuration - How long a media ticket lasts  
# (in minutes).  
  
MediaTicketDuration = 30
```

- b. Define the **MediaTicketDuration** property. The length of time (in minutes) each media ticket remains valid. After a media ticket has expired, Insight will generate a new media ticket. Media URLs accessed outside of Insight will return an expired ticket response once the specified duration has been exceeded.
- 7) Save and Restart:
  - a. Save the file and close it.
  - b. Restart the Media Manager.
- 8) Open the configuration file for BrowserInsight (BrowserInsight.conf) in a text editor:
  - a. Locate the server or collection entry you wish to enable Media Security.
  - b. Set the **mediaTicketDuration** property. We suggest 30 minutes.

```
Server.2.mediaTicketDuration = 30
```

- c. Set the **mediaSecuritySecretKey** property to the key you defined earlier (check your MediaManager.dat file on your Insight Media Manager if you are unsure of this property).

```
Server.2.mediaSecuritySecretKey = insight
```

- d. Save the file and close it.
  - e. Restart BrowserInsight.

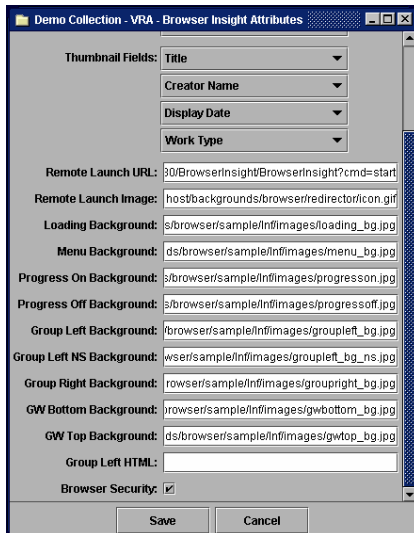
## Enable the Browser Security Property

**NOTE:** The default for this property is currently set to on.

- 1) Open the Insight Administrator Tools.
- 2) Connect to the Collection Manager you wish to configure.
- 3) Locate the Collection Configuration Properties node of the Collection Manager.

- 4) Edit the Collection Configuration Properties.
- 5) Open the “Edit Browser Properties” Subsection.
- 6) Make sure **Browser Security** is checked (seen below).

**Figure 5: BrowserInsight Attributes**



- 7) Restart Tomcat/Resin.

---

## Using your own version of Tomcat or using Resin

For more information on using your own version of Tomcat or Resin with the Insight Media Manager or BrowserInsight, please see Using your own version of Apache's Tomcat or using Caucho's Resin on page 261 for more information.

---

## Next Steps

- 1) Testing the server components and connecting to the Collection and User Managers for the first time with Insight Studio (please see page 204).
- 2) Configuring the server components to run as services under Windows and Linux (please see page 222).
- 3) Packaging and Distributing the Java Client (please see page 220).
- 4) Building your first collection (please see the Insight Administrator Guide).

# Starting the Insight Server Components for the First Time (in console mode)

---

Successful completion of the installation process is only possible when database, network, and local configuration settings have been correctly set. Components should continue to run properly after installation as long as the environment remains unchanged and all external elements that Insight relies on remain intact, unchanged, and running.

## Testing the Installation of the User Manager

---

Though you will likely implement the User Manager as a service, it is strongly recommended that you test User Manager in console mode first to make sure that it has been properly installed.

- 1) Locate the "InsightUserManager" executable in the User Manager installation directory.

If you installed with the default settings, you will find it in:

**Table 10: Common Installation Locations for the Insight User Manager**

Platform	Location
Windows	C:\program files\LunaImaging\5.x\user_manager\
Solaris / LINUX	/usr/home/insight/LunaImaging/5.x/user_manager/

- 2) Launch it.



- 3) A console window will open and begin a scroll of startup statistics. Toward the bottom of the scroll, look for the following line:

```
IUS: Accepting connection.
```

If you do not see this line, see the section labeled “Starting the User Manager in Console Mode” on page 270.

**NOTE:** Closing the console window will close the User Manager. Do not close the console window unless you want to close the User Manager.

## Testing the Collection and Personal Insight Managers

Though the Collection Manager and Personal Insight Manager are distinct products, they may both be tested in the same way. They will both be referred to as “Managers” below.

To begin testing them:

- 1) Locate the “InsightCollectionManager” executable in the Manager installation directory. If you installed with the default settings, you will find it in:

**Table 11: Common Installation Locations for the Insight Collection Manager**

Platform	Location
Windows	C:\program files\LunaImaging\5.x\collection_manager\xyz*
Solaris / LINUX	/usr/home/insight/LunaImaging/collection_manager/xyz*
	* where “xyz” is the short-name you defined for your collection

**Table 12: Common Installation Locations for the Personal Insight Manager**

Platform	Location
Windows	C:\program files\LunaImaging\5.x\personal_insight_manager\xyz*
Solaris / LINUX	/usr/home/insight/LunaImaging/personal_insight_manager/xyz*
	* where “xyz” is the short-name you defined for Personal Insight

- 2) Launch your Collection manager or Personal Insight Manager.
- 3) A console window will open and begin a scroll of startup statistics. Toward the bottom of the scroll, look for the following line:

```
XYZ: Accepting connection.
```

(where “XYZ” is the short-name you defined for your collection)

If you do not see this line, see the section labeled “Starting the Collection Manager or Personal Insight Manager in Console Mode” on page 271.

**NOTE:** Closing the console window will close the Collection or Personal Insight Manager. Do not close the console window unless you want to close the Collection or Personal Insight Manager.

## Starting Insight Studio

---

By starting Insight Studio on the server, you can test that your User Manager, Collection Manager, Personal Insight Manager, and Tomcat are working properly. Insight Studio is used to build collections and to configure Personal Insight.

**NOTE:** Your Collection Manager, Personal Insight Manager, User Manager must be running for Insight Studio to run properly.

**NOTE:** To test the media upload feature, you must also have Apache Tomcat running.

**NOTE:** Insight Studio is only available on Windows and Mac OSX. You may need to install Insight Studio on a client machine to run these tests.

### Testing the User Manager using Insight Studio:

- 1) Locate the Insight Studio Application and double-click on "Insight Studio 6.2".
- 2) If Insight Studio launches normally, you will see a login screen with a username / password.
- 3) Use the Insight Admin username / password you specified in the installer.
- 4) Click "login" when you've entered your password.
- 5) If you can login, the User Manager is running properly. If not, please confirm your administrative username and password.

### Testing the Collection Manager using Insight Studio:

- 1) You should be presented with the Collection Manager you just installed. If you installed a Personal Insight Manager it should be listed as well.
- 2) Double-click on the Collection Manager, and the folder should open with two options: "Create Catalog Template" and "Create a Collection", choose the latter.
- 3) If you see the Insight Studio "Getting Started" panel (shown below), then you know that your Collection Manager is running properly.
- 4) Repeat the steps above for the Personal Insight Manager.

**NOTE:** "Create a Collection" is not a Personal Insight option in Insight Studio. Insight Studio can create templates for Personal Insight, but cannot create Personal Collections.

## Testing Apache Tomcat 5.0.19

---

Apache's Tomcat Application Server provides a platform for JSP and Servlet Applications for Insight. Tomcat commonly runs on port 8080 or 8081, and optionally also supports SSL connections by default on 8443.

To Test Tomcat:

- 1) Locate Tomcat.

Locate the Tomcat installation directory. If you installed with the default settings, you will find it in: <see installation location>.

**Table 13: Common Installation Locations for Tomcat**

Platform	Location
Windows	C:\program files\LunaImaging\5.x\tomcat\bin
Solaris / LINUX	/usr/home/insight/LunaImaging/tomcat/bin

- 2) Start Tomcat.

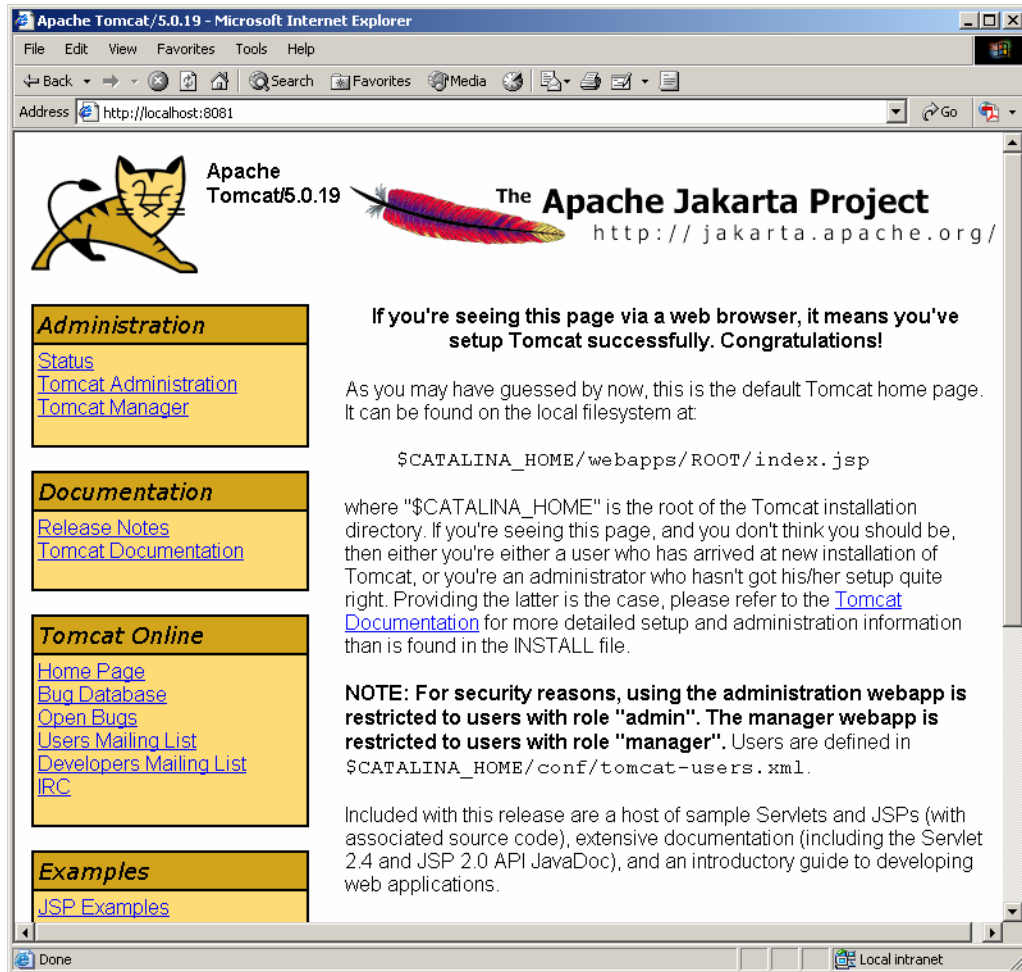
Run "start\_tomcat.bat" (Windows) or "start\_tomcat.sh" (Solaris/Linux) from the Command Line (make sure it is not already running as a service!).

- 3) Test that Tomcat is running.

Open a web browser. Go to <http://localhost:8081/>

**NOTE:** If you specified a different port for tomcat in the installer, replace 8081 with the appropriate port.

You should see the following page:



If you see anything other than the page above, check the Tomcat console for errors. Below is an example of the console output of a valid Tomcat startup:

```

Tomcat 5.0.19 {Insight}
--> Wrapper Started as Console
Launching a JVM...
Wrapper (Version 3.1.0) http://wrapper.tanukisoftware.org

Jun 4, 2004 9:15:50 PM org.apache.coyote.http11.Http11Protocol init
INFO: Initializing Coyote HTTP/1.1 on port 8081
Jun 4, 2004 9:15:50 PM org.apache.catalina.startup.Catalina load
INFO: Initialization processed in 2263 ms
Jun 4, 2004 9:15:50 PM org.apache.catalina.core.StandardService start
INFO: Starting service Catalina
Jun 4, 2004 9:15:50 PM org.apache.catalina.core.StandardEngine start
INFO: Starting Servlet Engine: Apache Tomcat/5.0.19
Jun 4, 2004 9:15:50 PM org.apache.catalina.core.StandardHost start
INFO: XML validation disabled
Jun 4, 2004 9:15:50 PM org.apache.catalina.core.StandardHost getDeployer
INFO: Create Host deployer for direct deployment ( non-jmx )
Jun 4, 2004 9:15:50 PM org.apache.catalina.core.StandardHostDeployer install
INFO: Processing Context configuration file URL file:C:\Program Files\LunaImagin
g\5.0\tomcat\conf\Catalina\localhost\browserinsight.xml
Jun 4, 2004 9:15:54 PM org.apache.catalina.core.StandardHostDeployer install
INFO: Processing Context configuration file URL file:C:\Program Files\LunaImagin
g\5.0\tomcat\conf\Catalina\localhost\media_manager.xml
Jun 4, 2004 9:15:59 PM org.apache.catalina.core.StandardHostDeployer install
INFO: Processing Context configuration file URL file:C:\Program Files\LunaImagin
g\5.0\tomcat\conf\Catalina\localhost\xmlgateway.xml
Jun 4, 2004 9:16:00 PM org.apache.catalina.core.StandardHostDeployer install
INFO: Installing web application at context path from URL file:C:\Program Files
\LunaImaging\5.0\tomcat\webapps\ROOT
Jun 4, 2004 9:16:00 PM org.apache.coyote.http11.Http11Protocol start
INFO: Starting Coyote HTTP/1.1 on port 8081
Jun 4, 2004 9:16:00 PM org.apache.jk.common.ChannelSocket init
INFO: JK2: ajp13 listening on /0.0.0.0:8009
Jun 4, 2004 9:16:00 PM org.apache.jk.server.JkMain start
INFO: Jk running ID=0 time=20/131 config=C:\Program Files\LunaImaging\5.0\tomcat
\conf\jk2.properties
Jun 4, 2004 9:16:00 PM org.apache.catalina.startup.Catalina start
INFO: Server startup in 10636 ms

```

## Identifying Exceptions while watching the Tomcat Console

The most common error with Tomcat is that there is already a service running on Tomcat's port. On the console, you will see an error similar to this:

```
java.net.BindException: Address already in use: JVM_Bind:8081
```

If you already have something running on this port, you can change the port that Tomcat uses in Tomcat's `server.xml` configuration file.

**NOTE:** If you are running another version of Tomcat on the same machine, other ports supporting SSL, AJP, or J2K may also overlap and cause errors, please consult your `server.xml` for more information on changing these.

**NOTE:** The server install has configured many of Insight's components to use the port and hostname that you supplied in the installer, changing these after the fact will result in the manual re-configuration of the Collection Manager, Personal Insight Manager, Media Manager, BrowserInsight, and XML Gateway.

## Testing the JPEG2000 Decoder & the Media Manager

---

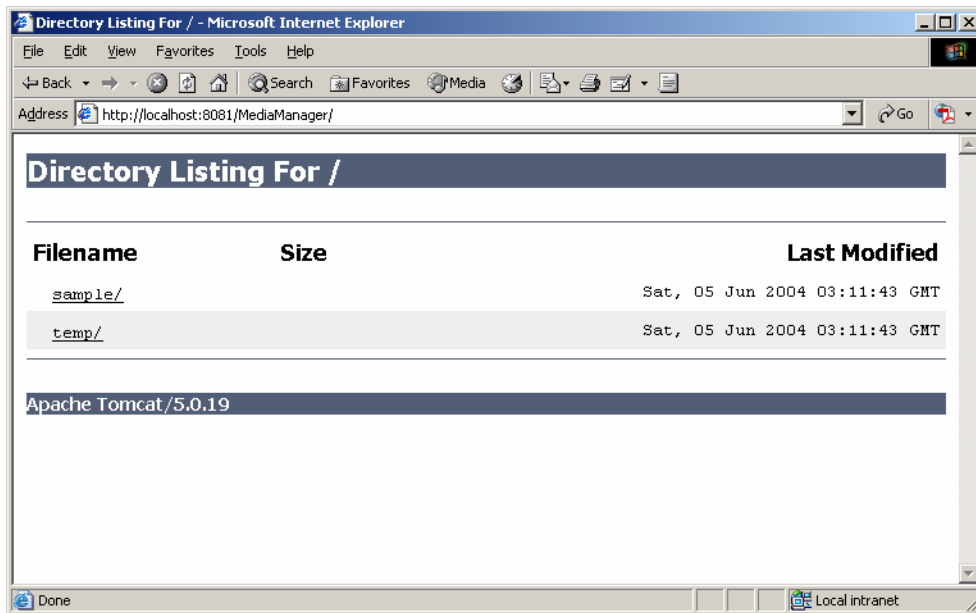
To test the Media Manager, start Tomcat and open a web browser on the same machine.

**NOTE:** This testing document assumes that tests are run from the computer where Media Manager was installed, and is running Luna's distribution of Tomcat. If you are using your own version of Tomcat or using Resin, or are testing from another machine, you will have to adjust the tests.

### Testing that the Media Manager is installed.

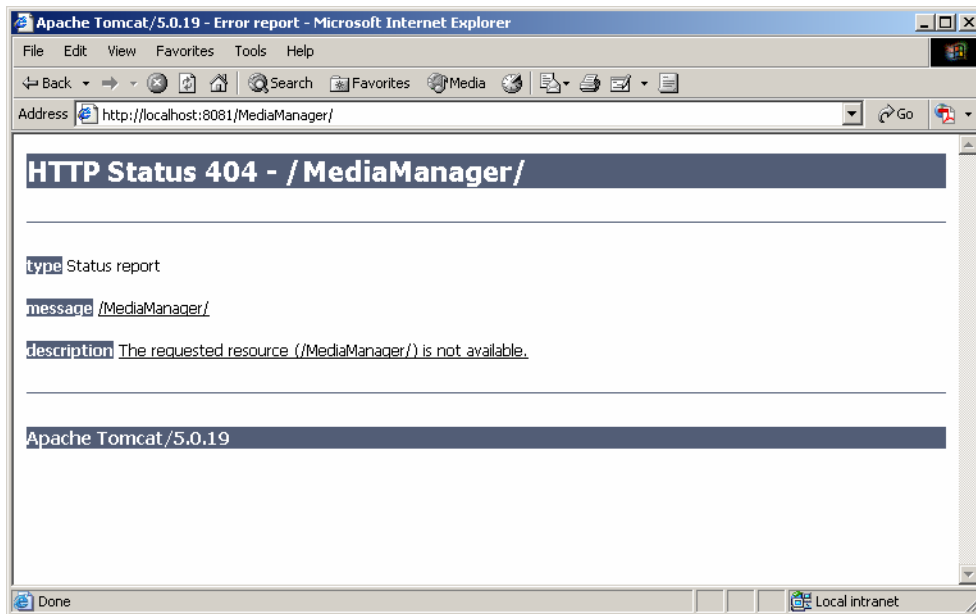
- 1) In your browser, go to <http://localhost:8081/MediaManager/>. You should see a screen similar to Figure 6: Finding Media Manager Context in Tomcat below.
  - a. If you do not see the page as displayed in Figure 6: Finding Media Manager Context in Tomcat below, the Media Manager servlet was not loaded.
    - i. Check that the Media Manager was installed. It should be located in the `media_manager` directory of your Installation Directory.
    - ii. Check that the Media Manager Servlet Context file was installed. The "`media_manager.xml`" should be in `conf/Catalina/localhost` directory under the Tomcat installation directory.
    - iii. Open the "`media_manager.xml`" and confirm that the **docBase** parameter points to the `media_manager/servlet` directory above.

**Figure 6: Finding Media Manager Context in Tomcat**



An example of a failure to load properly:

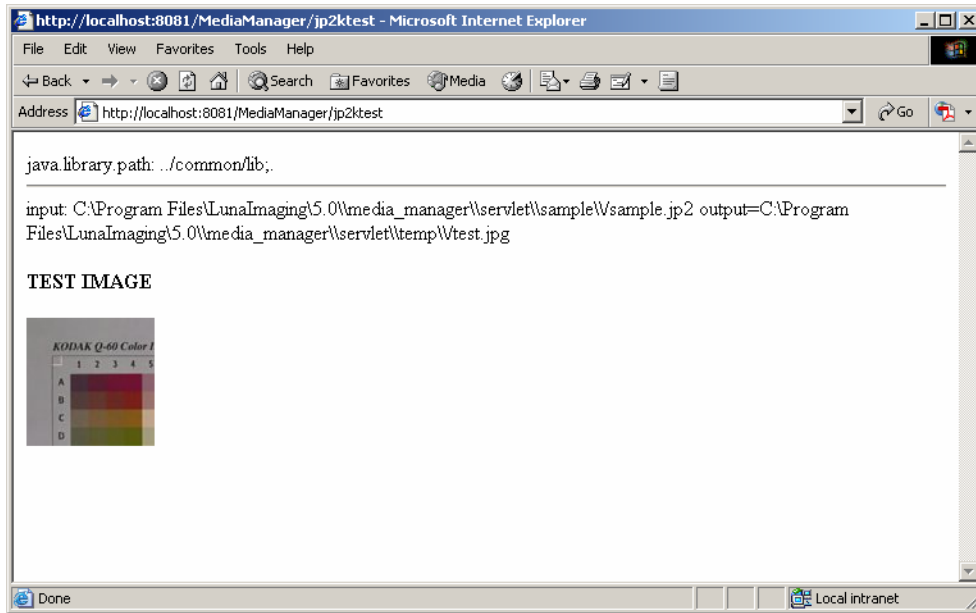
**Figure 7: Failure to find Media Manager Context in Tomcat**



## Testing the JPEG2000 Decoder:

- 1) If the Media Manager page loaded successfully, go to <http://localhost:8081/MediaManager/jp2ktest>. You should see:

**Figure 8: Successful Test of the JPEG2000 decoder**



2) If you see the error shown in Figure 9: Missing JPEG2000 Library Error below:

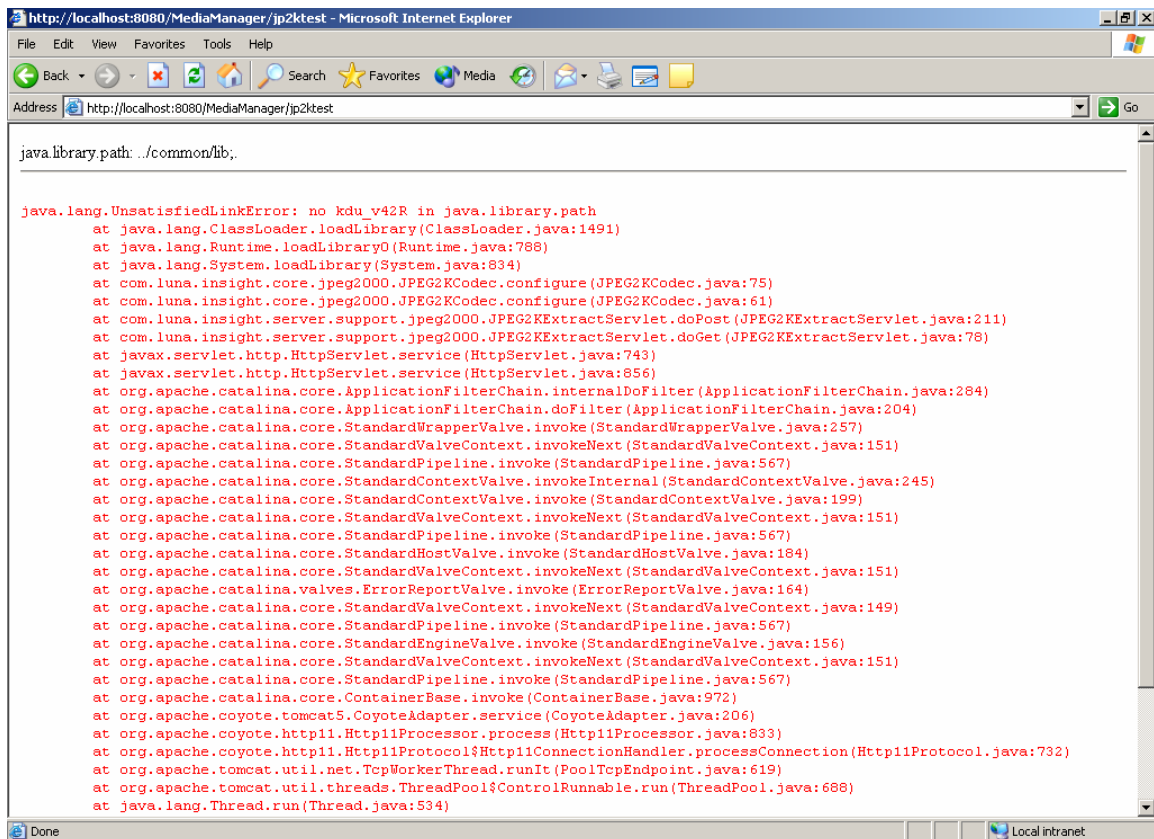
- a. Then it means that the JPEG2000 libraries are not accessible by Java. Check that the libraries are in the library path (specified above).
  - i. Open the Insight installation directory.
  - ii. Navigate to the following directory:

<installation\_directory>/tomcat/common/lib

**NOTE:** This is the same location as ../common/lib in the example above.

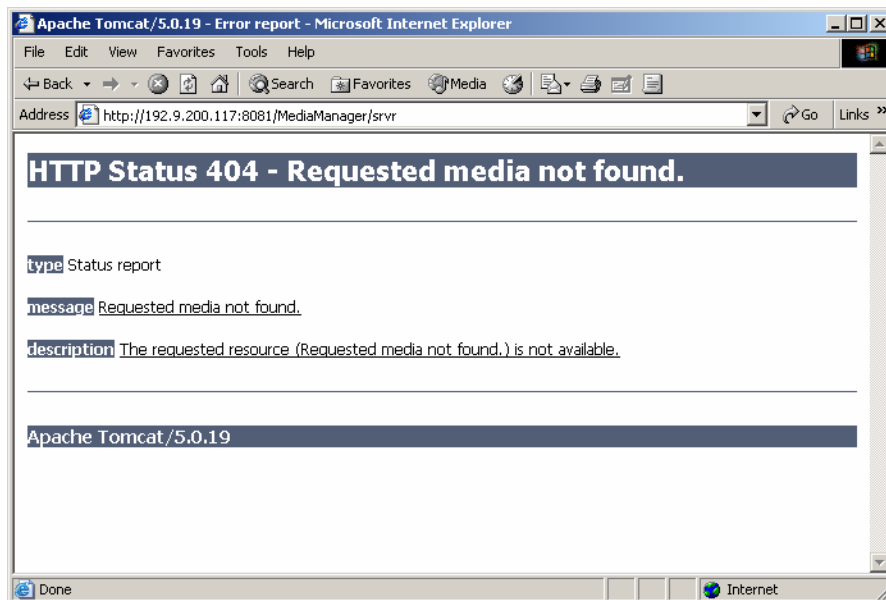
- b. Check if the following libraries are in the common/lib directory, then add them (there are versions of the libraries in the <installation\_directory>/media\_manager/support directory separated by OS). If the libraries are there, check the rights to ensure that Tomcat has the ability to see them.

**Figure 9: Missing JPEG2000 Library Error**



- 3) Go to <http://localhost:8081/MediaManager/srvr>. You should see the message below:

**Figure 10: Media Manager Message with Ticketed Security Disabled**

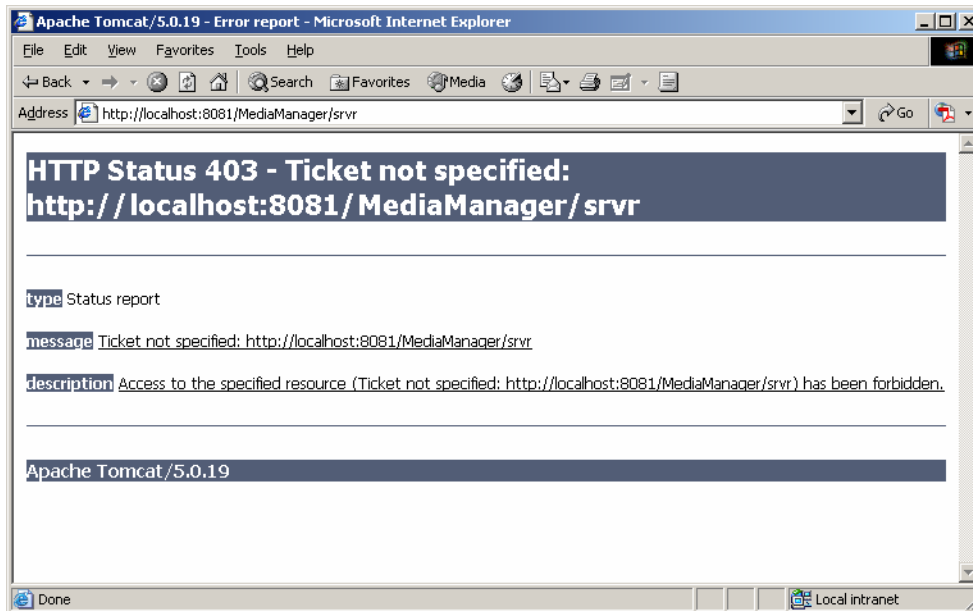




If you see the above message, then it means that the Media Manager is properly installed and is running.

If you have Media Security enabled you will see the message below:

**Figure 11: Media Manager Message with Ticketed Security Enabled**



- 4) If media is not showing up in Insight, but the above tests show that the Media Manager is operational, the problem is likely in the Collection Manager's configuration. A few items to check:
  - a. In Insight Administrator Tools or Insight Studio, check that the SPS values point to the Media Manager URL. See Updating your Insight Collection Profiles to use the Media Manager on page 196 for more information.
  - b. Do the private keys setup in the Media Manager and the Collection Manager match? See Enabling Media Security on page 200 for more information.

## Troubleshooting an Unsatisfied Link Error on Solaris

On Solaris, the JPEG2000 decoder requires common shared libraries to be installed in order to function properly. If these libraries are not installed, they may result in a **java.lang.UnsatisfiedLinkError**. For example:

```
java.lang.UnsatisfiedLinkError:/home/insight/Insight5.x/tomcat/common
/lib/libkdu v42R.so: ld.so.1:
/home/insight/Insight5.x/jre/jre/bin/java: fatal: libstdc++.so.5:
open failed: No such file or directory
```

This error is a result of missing libraries in /usr/local/lib. The tomcat sh script assumes the **libgcc\_s.so.1** and **libstdc++.so.5** libraries exist in /usr/local/lib.

If you do not have copies of these libraries installed, you can find copies at:

```
<install_dir>/media_manager/support/Solaris-gcc/
```

To Install **libgcc\_s.so.1** and **libstdc++.so.5**:

- 1) Copy libgcc\_s.so.1 and libstdc++.so.5 to a common directory.
- 2) Open the /tomcat/bin/tomcat\_service.sh in a text editor.
- 3) Locate the following Line:

```
LD_LIBRARY_PATH=/usr/local/lib
```

- 4) Append the full path to the libraries to the end of the LD\_LIBRARY\_PATH with a colon separating the current and new path.

```
LD_LIBRARY_PATH=/usr/local/lib;/new/path
```

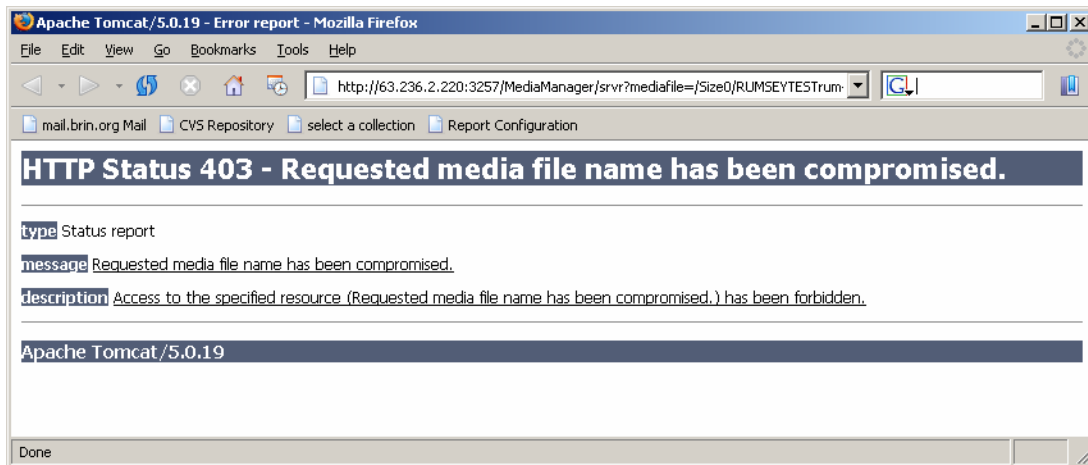
- 5) Save the file and close it.
- 6) Restart the tomcat service and go to <http://localhost:8081/MediaManager/jp2ktest> to verify that the error does not persist.

**NOTE:** Alternately, you can download the libgcc-3.3-sol8-sparc-local.gz package and install the libraries from <http://www.sunfreeware.com/>

## Troubleshooting a Media File Compromised Error

One error with the Media Manager is that the base file path for media may be slightly different from the actual path. This most commonly occurs on Windows where file-paths are not case sensitive (while the Media Manager's checks are). If you see an error similar to the following, then check the MediaFileRootDir parameter.

**Figure 12: Media File Compromised Error**



To change the MediaFileRootDir property:

- 1) Open your MediaManager.dat file (located in the media\_manager directory) in a text editor.
- 2) Find the MediaFileRootDir parameter.
- 3) Check that the value matches the path to your media exactly (check the case of all pieces as well).
- 4) Save the file.
- 5) Restart Tomcat.

## Testing your BrowserInsight Installation

Once you have modified the configuration files for Tomcat or Resin by adding the context for BrowserInsight, start Tomcat or Resin. By default, Tomcat and Resin are configured to run on Port 8081, to test that Resin or Tomcat is running properly:

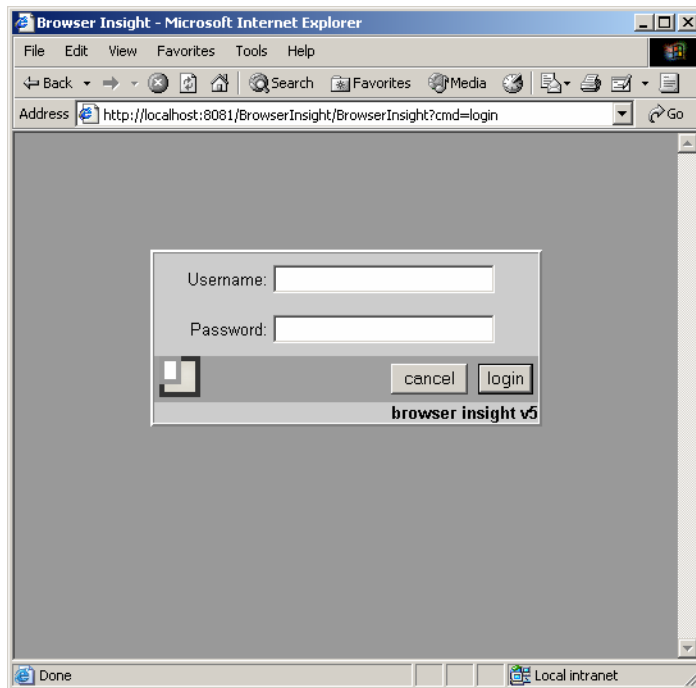
Open a web Browser on the server running tomcat or resin and load the following page:

```
http://localhost:8081
```

- 1) Both Resin and Tomcat will display a default page stating that they are configured properly. If you do not see a page like this, check your configuration files for errors. There may be a missing "<" or ">". For other common configuration problems, review the Resin or Tomcat Manual.
- 2) If the default page loaded properly, load the following page:

```
http://localhost:8081/BrowserInsight/BrowserInsight
```

3) If Insight is configured properly, you should see a login page (below):



4) Enter your administrative username and password.

If you have already built collections, then you can press login and select one.

If you are expecting to see collections, but cannot, then the next step is to enable BrowserInsight's debugging information.

## Troubleshooting Collections not displaying in BrowserInsight

BrowserInsight will attempt to dynamically add new 5.x collections once they're created. To this end, there is one requirement for any collection, specifically, that there is already a collection in that database. If there is an existing collection in that database, BrowserInsight will dynamically add the collection once it's created. If you just added a new Collection Manager or Personal Insight Manager to your version of BrowserInsight, try restarting BrowserInsight once the collection has been created.

If your collection still is not showing in the select list, try increasing the debug level and watching the console text. For more information on increasing the debug level for BrowserInsight, please see Enabling Debug Information for BrowserInsight on page 276.

## Testing the XML Gateway

Testing for proper installation and configuration of the Insight XML Gateway is a two-step process. Before testing the XML Gateway installation, please ensure that

Tomcat or Resin is properly installed and is able to serve its standard web pages and servlets. The default URL for the XML Gateway is:

<http://<ipaddress>:<port>/insight/servlet/XMLGateway>

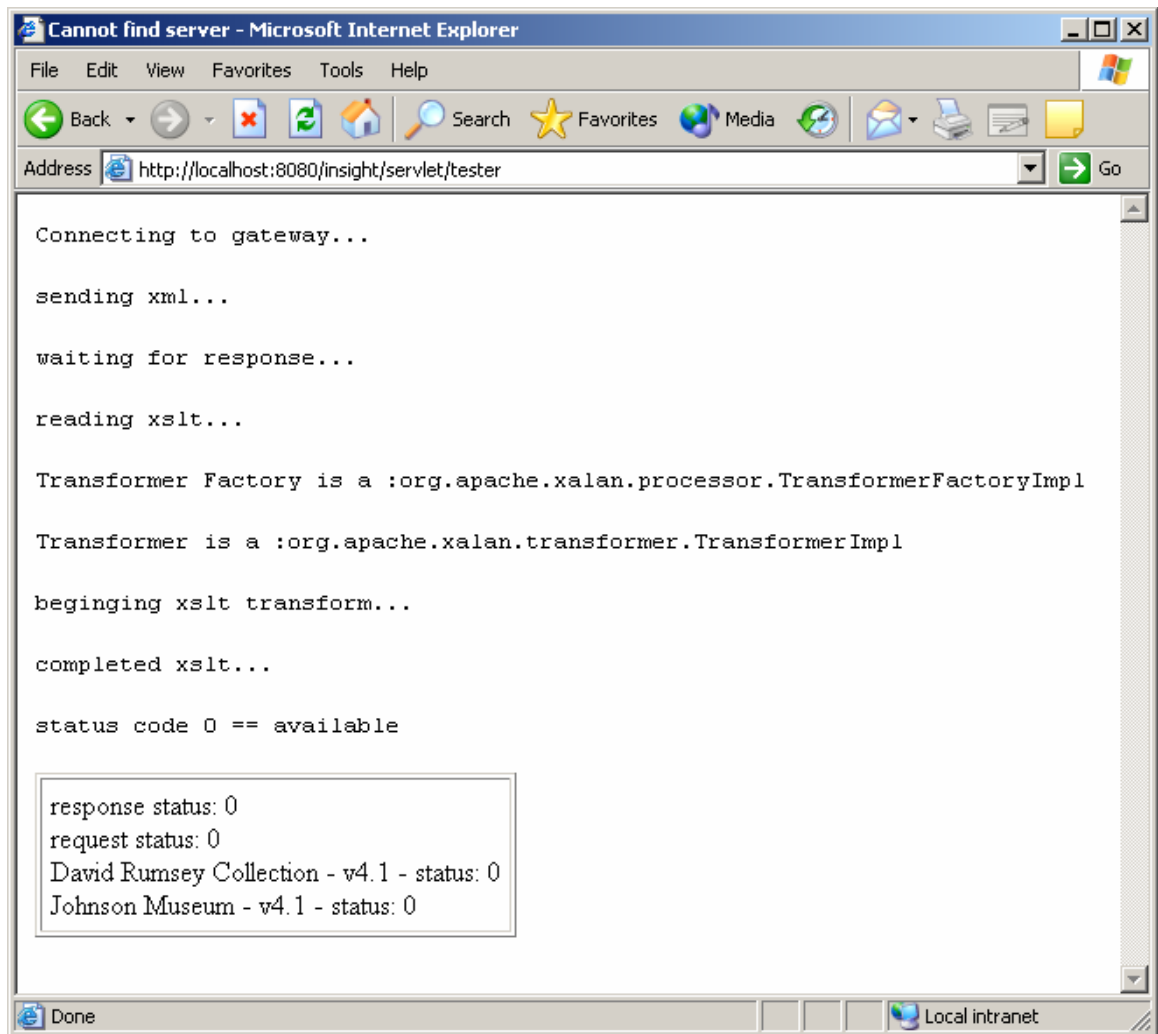
These instructions assume that a default installation of Tomcat/Resin is being used as the servlet container, though Tomcat is shown. The testing process using Resin is similar, but exact steps and screenshots will differ.

Out of the box, the 6.2 version of Insight was shipped with a "Gateway Tester" application which sends a "collection list" request to the XML Gateway and returns the result. (For more information on the different types of requests that Insight XML Gateway responds to, please see the XML Gateway Documentation.)

- 1) Since the XML Gateway is middleware, it has no front-end. It can be tested by running a program that accesses it. A tester has been written for that purpose. Run the tester by going to the following location with your browser:

<http://<ipaddress>:<port>/insight/servlet/tester>

where <ipaddress> and <port> are those of the running Tomcat/Resin server. When Tomcat/Resin and the XML Gateway are properly configured, you should receive the following response:



Analyzing the messages above step by step:

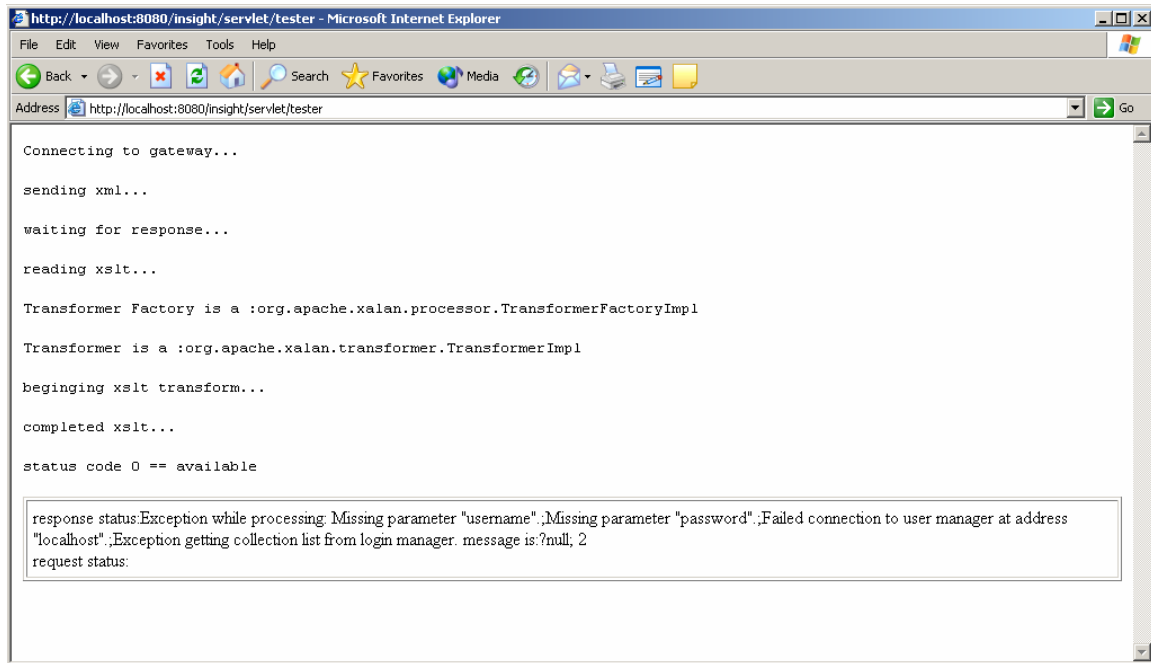
- 1) Connecting to gateway ... (the tester is connecting to the XML Gateway).
- 2) sending xml ... (if you got this far, then the tester connected properly to the XML Gateway).
- 3) waiting for response ... (xml was sent to the Gateway).
- 4) reading xslt... (received xml response, now processing).
- 5) Transformer factory ... (ignore).
- 6) Transformer is (ignore).
- 7) beginning xslt transform... (ignore).
- 8) completed xslt ... (check for errors below this line).

**NOTE:** The response status is 0 – meaning that the xml gateway is configured properly and was able to connect / communicate with the User Manager.

**NOTE:** Your list of collections will differ, based on collections made available to the XML Gateway.

**NOTE:** Each collection will also display a status message after it.

A successful test will return a response of 0 – similar to above.



Error codes will be accompanied by a message in the status box. It will display any configuration errors in the xml gateway's web.xml configuration file.

<http://<ipaddress>:<port>/insight/servlet/XMLGateway>

# Packaging and Distributing the Java Client

---



DEPLOY DIRECTOR IS NO LONGER SUPPORTED BEYOND 5.6

Deploy Director is no longer available as an add-on to Insight, however, depending on whether you purchased Deploy Director when it was available you may have one or two options for distributing the Insight Java Client. If you did not purchase Deploy Director when it was still available, you can repackage the Java Client with a custom configuration. If you did purchase Deploy Director, you can use Deploy Director to manage, install and upgrade the Java Client.

## Repackaging the Java Client with your User Manager Address

---

To package and distribute the Insight Java Client with your own configuration, simply zip up the Java Client's installer with a custom Insight.dat file. The installer will use that configuration file instead of the one that is packaged with the client. For detailed instructions on packaging the client, as well as instructions on customizing all of Java Client's configuration options, please see Repackaging & Advanced Configuration of the Insight Client Applications on page 280 for more information.

## Distributing the Java Client using Deploy Director

---



DEPLOY DIRECTOR IS NO LONGER SUPPORTED BEYOND 5.6



Deploy Director was a powerful tool for managing and distributing the Java Client, unfortunately it is no longer available for new Insight clients. For more information on installing and configuring previously purchased Deploy Director, please see Deploy Director on page 239 for more information.

## Updating Deploy Director with the 6.2 Version of the Insight Java Client

---



DEPLOY DIRECTOR IS NO LONGER SUPPORTED BEYOND 5.6

For information on packaging and distributing the Java Client and updating an existing version of Deploy Director, please see Upgrading the Insight Client Bundle to on page 252 for more information.

# Configuring the Collection and User Managers to Run as Services

---

Insight is fully integrated with the Java Services Wrapper, an LGPL product from Tanuki Software (<http://wrapper.tanukisoftware.org/doc/english/introduction.html>). The service wrapper software allows Insight to integrate with the services interface for Windows, Solaris, or Linux.

## Installing the Insight Server Components as a Service on Windows

---

The User Manager, Collection Manager, Personal Insight Manager, and Tomcat are pre-configured to run with the services wrapper. In each case, a series of batch files are installed to enable you to easily add and remove the service.

### **Install\_as\_service.bat:**

Registers the Insight application with the windows service registry.

### **Uninstall\_as\_service.bat:**

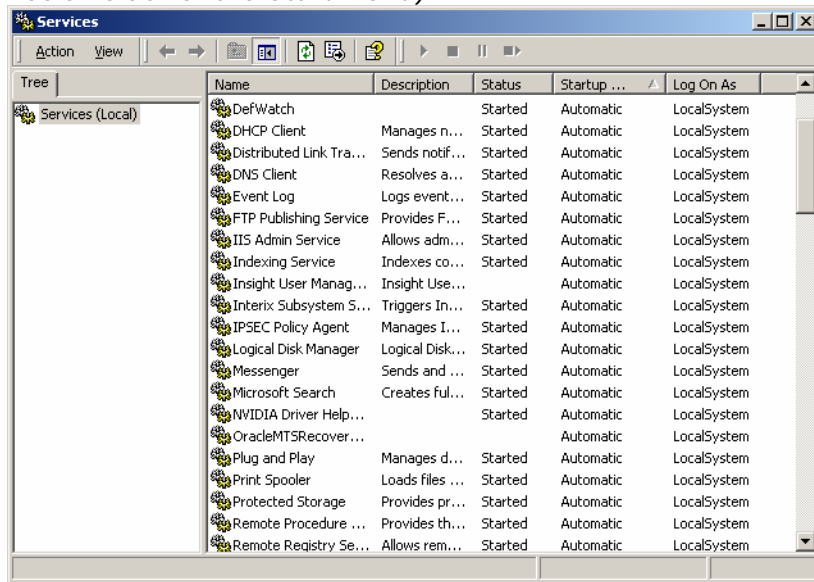
Removes the Insight application from the windows service registry.

To Install an Insight Application Component as a Service

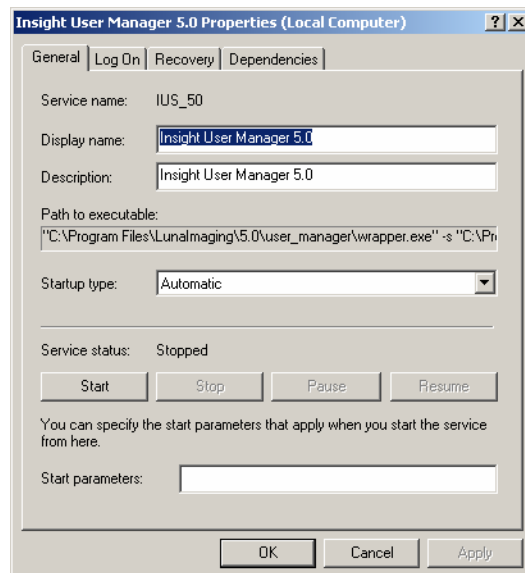
- 1) Test that the server component starts correctly in console mode.
- 2) Run install\_as\_service.bat.

```
wrapper | Insight User Server 5.x installed.  
Press any key to continue . . .
```

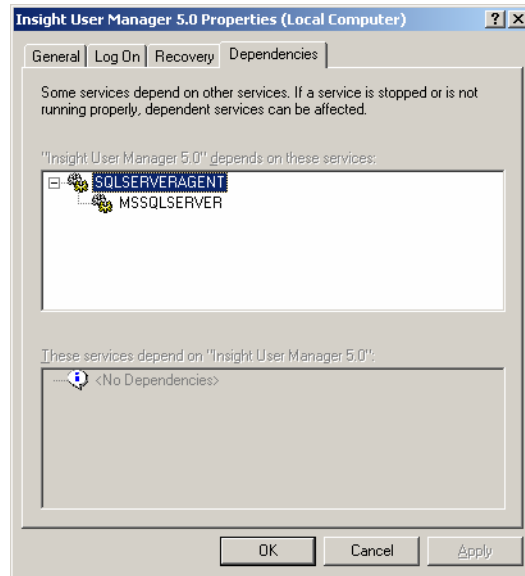
- 3) Confirm that the service was installed properly.
  - a. Open the Windows service console (located in the Server Administrator Tools Folder of the Start Menu).



- b. Locate the Service you installed.
- c. If you are Installing the Collection Manager, User Manager, or Personal Insight Manager, then you should also check the database dependencies.
  - i. Right-click on the service and choose "properties."



- ii. Choose the "Dependencies" tab.



- iii. If the service has been configured properly, you should see the name of the service for your database in the list of dependencies. If you don't see your database's service listed as a dependency, then delete the service by running `Uninstall_as_service.bat`, and follow the instructions below for configuring the service dependencies by hand.

**NOTE:** Dependencies can only work when the Database and Insight server components are on the same machine.

### Configuring Insight's service dependencies by Hand

If the Collection, User, or Personal Insight Manager is running properly, then we need to identify dependencies for Insight to start before we can install it as a service. The User Manager, Collection Manager, and Personal Insight Managers are dependent on the database.

- 1) Locate the service name for the database. To do this, open the Windows Service Manager (located in the Server Administrator Tools Folder of the Start Menu).

Find the service for your database. Many databases have multiple services associated with them.

Database Name	Service Name
Microsoft SQL Server	SQLSERVERAGENT: SQL Server Agent is actually the listener for Microsoft SQL Server. If it's not running, applications will not be able to connect to the SQL Server Database.
Oracle	OracleService<SID NAME>: For Oracle, there is a service for each SID listener. The name of the service is the combination of OracleService and the SID Name, for example OracleServiceMySID (where MySID is the name of your SID).
MySQL	MYSQL

- 2) Choose properties.
- 3) The first entry should be the actual name of the service (used for dependencies).
- 4) Once you have the name of the database service, we'll configure the Insight server component to depend on it.
  - a. Open the configuration file for the component:
    - InsightServer.dat
    - or
    - InsightUserServer.dat
  - b. Locate the following line:

```
wrapper.nts.service.dependency.1=
```

- c. Add the name of the database service immediately after the =
- d. Now install the service by running the install\_as\_service.bat file. You should see this for the user server:

```
wrapper | Insight User Server 5.x installed.  
Press any key to continue . . .
```

- e. If you see something like this:

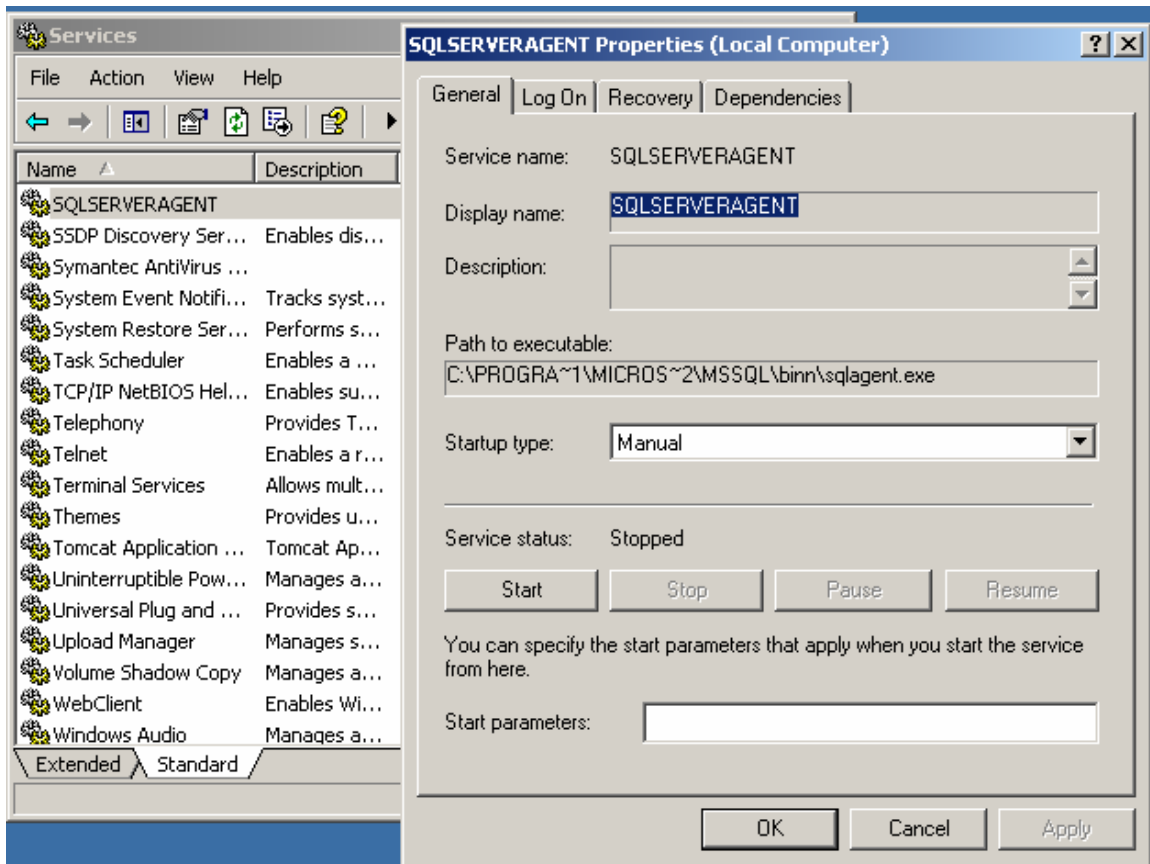
```
wrapper | CreateService failed - The specified service already  
exists. (0x431)  
Press any key to continue . . .
```

Then there's already a service installed with this name. Check that the service hasn't already been installed or, if it has, then change the name of the service by changing this entry in the config file:

```
wrapper.nts.service.name=
```

Try installing the service again.

**Figure 13: Windows Service Manager**



- 5) Open the Windows Services interface (or if it's already open, refresh it). You should now see each of the services you installed. If you look at the dependencies, you should also see a list of the dependent services.
- 6) Now start the service and try logging in.

## Installing the Insight Server components as a Service on Linux or Solaris

**NOTE:** Each Linux / Solaris / UNIX System is different. Check with your Sysadmin before going any further.

### Prerequisites:

Before you can set up Insight as a service, you must first:

- 1) Have root access to your machine.
- 2) Understand the basics of the rc.d and inet.d settings.
- 3) Know where your database and network are setup in the system boot sequence.

### Installing Insight or Tomcat as a Service:

Insight and Tomcat have been set up to run as services. However, the services need to be registered with the Operating System before they can be used. Each component will include one shell script which can control Insight as a service. **These shell scripts (named `insight_Collection_service.sh`, `insight_User_service.sh`, or `tomcat_service.sh`) should not be moved from their current locations.**

Service shell script installation locations:

```
/LunaImaging/Tomcat/bin/ -- tomcat  
/LunaImaging/user manager/ -- User Manager  
/LunaImaging/collection manager/***/ -- collection mgr.  
/LunaImaging/personal_insight /***/ -- personal insight
```

(where \*\*\* is the installation directory)

Each shell script responds to the standard start / stop service commands for a Unix / Linux System. Based on where your database is placed in the RC / Inet Hierarchy, set the Insight server components as follows:

#### ON STARTUP:

If your database is set as 20 in the startup script, you'll want to set the Insight server components as 21 (so that they startup after the database). To actually install the script, create a symlink to the shell script.

For more detailed instructions on how to configure the service on Solaris or Linux, please see:

#### Solaris:

<http://wrapper.tanukisoftware.org/doc/english/launch-nix-boot-solaris.html>

#### Linux:

<http://wrapper.tanukisoftware.org/doc/english/launch-nix-boot-debian.html>

# Apache Tomcat 5.0

---

Bundling Insight with Tomcat 5 simplifies installation and configuration as well as management.

## Tomcat Manager

---

The Tomcat Manager application is designed to simplify the management and deployment of servlet applications. Luna has configured the Tomcat Manager to restrict access to only requests from that machine. Furthermore, it has been pre-configured with your Insight admin username and password.

**The Tomcat Manager can be reached by going to:**

```
http://localhost:8081/manager
```

For more information on the Tomcat Manager and how to use it, please see Tomcat's user document.

## Tomcat Configuration Files

---

Tomcat 5.0 has three main locations for configuration information:

### The Tomcat server.xml

The Tomcat 5.0 server.xml specifies the port and other general information about Tomcat. If you need to change the port Tomcat is running on after you've installed, you would adjust it here.



## The Tomcat Context Area

The Tomcat Context area, located in the Catalina/localhost directory of Tomcat's conf directory contains a series of XML files, one for each of Tomcat's Servlet Contexts.

Each of these XML files contains basic configuration information for its servlet, including debug levels, IP Restrictions, the location of the servlet's files, and other general information.

## web.xml Files

Each Java servlet has a web.xml configuration file in its WEB-INF directory to specify initialization parameters and other startup information.

## Tomcat Help Files

All of Tomcat's documentation has been installed with Insight and can be located in the **webapps-disabled\tomcat-docs** directory of the Tomcat directory.

## Managing Tomcat Administrative Users

Apache Tomcat manages administrative users using a tomcat-users.xml file located in the conf directory. You may edit this file to add administrative users, or change passwords.

# Configuring BrowserInsight

---

BrowserInsight is one of the Insight Servlet Components, providing browser-based access to Insight collections. It is installed and configured by default with each new Collection Manager or Personal Insight Manager you add or upgrade.

## **Common Administrative Tasks to Perform with BrowserInsight:**

- Enabling Auto-login
- Changing the User Manager
- Adding a collection or Collection Server
- Enabling Media Security
- Changing the behavior of the "Collection Selection Panel" on login
- Changing the maximum number of speed-search values

## **Differences in BrowserInsight between 4.1 and 5.x**

---

In 5.x, the BrowserInsight configuration file has changed a bit. Besides Collection entries, which represent database connections for specific collections, the BrowserInsight.conf contains entries for Server entries (which represent a Collection Manager or Personal Insight Manager). 5.x no longer requires a **BrowserUniqueCID** entry in the User Manager's collection table.

For existing collections, leave your collection and BrowserUniqueCID entries as they were in 4.1 (as any change will break all existing Remote Launch Strings to that collection). For new collections, use the "Server" method without the BrowserUniqueCID.

## Configuring BrowserInsight by Editing the BrowserInsight.conf Configuration File

---

After installation, the Insight Suite Installer will configure BrowserInsight with information about your User Manager, Collection and Personal Insight Managers. You should not have to configure anything for BrowserInsight.

**NOTE:** Though you will not need to add new collection entries to the Browser each time you create a collection, you will need to restart the BrowserInsight Servlet before it sees any new collections.

### Locating the BrowserInsight.conf Configuration File

The BrowserInsight configuration maintains information on BrowserInsight's database connections, collections, and other basic information.

To Locate the BrowserInsight.conf:

- 1) Locate your Insight Installation Directory.
- 2) Open the **browserInsight** directory.
- 3) Your **BrowserInsight.conf** file is located here.

### Configuring BrowserInsight to Bypass the Login Page

BrowserInsight is initially configured to require users to enter a username and password to view collections. If you would like to allow users direct access to collections without being asked to enter a username and password, you can provide default values in the configuration file.

To configure "auto-login":

- 1) Locate the following lines in the BrowserInsight.conf configuration file:

```
#DefaultBrowserInsightUsername =  
#DefaultBrowserInsightPassword =
```

- 2) Remove the comment character (#) from the beginning of both lines.
- 3) Add the default username and password of your choice after each equals sign.

```
DefaultBrowserInsightUsername = myusername  
DefaultBrowserInsightPassword = mypassword
```

- 4) Save the BrowserInsight.conf configuration file and restart BrowserInsight.

## Configuring BrowserInsight to Close the Collection Selection Window After Opening a Collection in the Group Workspace or Image Workspace

After a user enters their username and password, they are presented with a collection selection window. When users click on a Remote Launch String, if more than one collection is available to that user, BrowserInsight by default will also display that collection selection window in the background. As an administrator, you may choose what happens to that collection selection window if they click on a Remote Launch String, either to leave the window open, or close it.

To configure the collection selection window to close when users click on a Remote Launch String:

- 1) Locate the following lines in the BrowserInsight.conf configuration file:

```
# if set to 1, when a remote launch string is invoked the collection
# selection
# window will close after login, and BrowserInsight will launch the
# selected
# collection
# if set to 0, the default, BrowserInsight will keep the collection
# selection
# window open in the background
#
# CollectionSelectionWindowMode=0
```

- 2) Remove the comment character (#) from the beginning of the **CollectionSelectionWindowMode** line.
- 3) Set the **CollectionSelectionWindowMode** parameter to 1.

```
CollectionSelectionWindowMode=1
```

- 4) Save the BrowserInsight.conf configuration file and restart BrowserInsight.

## Configure Collection Manager Server Database Settings

BrowserInsight can connect to multiple collection databases. For each database, you must specify a server entry with the following parameters: Database Driver, Connect String, Username, Password, Media Manager Address, and Media Manager status.

For collections that were created pre-5.0 environment, BrowserInsight still supports "Collection" entries which enable access to specific collections and tie Remote Launch Strings to collection entries via the **BrowserUniqueCID**.

```
Collection.1.InsightDBDriver = sprinta

Collection.1.connectString =
www.dalton.org:1433?database=insightVRA&sql7=true&user=insight&password=admin

Collection.1.username =
```

```

Collection.1.password =

Collection.1.mediaSecurityEnabled      = yes

Collection.1.mediaSecurityServletUrl =
http://localhost:8081/Media_Manager/srvr


Server.2.InsightDBDriver = oracle

Server.2.connectString = @www.dalton.org:1521:insight

Server.2.username = a_user_name

Server.2.password = a user password

Server.2.mediaSecurityEnabled      = yes

Server.2.mediaSecurityServletUrl =
http://localhost:8081/Media_Manager/srvr

```

The example above shows two entries: one for a specific collection using the Sprinta Driver and VRA Database, the other a server entry for a 5.x Collection Manager which may have multiple collections in its Oracle Database.

**Table 14: Required Entries for a Collection or Server Entry in BrowserInsight**

Collection or Server Parameter	Description
InsightDBDriver	The Database Driver Insight should use to connect to the Collection Manager database. Valid entries include (sprinta, oracle, JTurbo and jtds).
connectString	The Database Connection String Insight should use to connect to the Collection Manager database.
username	The Database Username Insight should use to connect to the Collection Manager database.
password	The Database Password Insight should use to connect to the Collection Manager database.
mediaSecurityEnabled	Specify whether BrowserInsight should use the Media Manager when requesting media. The default is "no", should be set to "yes" in general.
mediaSecurityServletUrl	The URL for the Media Manager, this should be <a href="http://your.media.manager:8081/Media_Manager/srvr">http://your.media.manager:8081/Media_Manager/srvr</a>

**Table 15: Optional Entries for a Collection or Server Entry**

Collection or Server Parameter	Description
mediaTicketDuration	The length of time a media request ticket is valid. The default value is 30 minutes.
mediaSecuritySecretKey	The private key BrowserInsight should use to request a ticket for accessing media. This must match the value in the Media Manager's configuration file.

mediaTicketless	Set this setting to yes if you would like to use the Media Manager, but don't require the media security settings.
-----------------	--

---

# Enabling Media File Deletion

---

By default the Insight Media Manager does not delete Media off of the server. To enable media deletion, follow the directions below.

1. Edit the MediaManager.dat located in the "media\_manager" directory of the installation directory.
2. Locate the following section.

```
##  
# MediaSecurityKey - The security key used by the Media Manager.  
# This security key must be the same in both the  
# collection server and media security servlet environments.  
  
MediaSecurityKey =  
  
##  
# MediaDeleteEnabled - If set to 1, the media security servlet will  
# delete media  
# from server when users delete media from client applications.  
# The default value is 0 (does not delete media from server)  
  
MediaDeleteEnabled = 0
```

3. Enter a value for the MediaSecurityKey property
4. Change MediaDeleteEnabled to 1.
5. Save the file.
6. Edit the InsightServer.dat located in your the Collection\_Manager directory.
7. Locate the following section.

```
##  
# MediaSecurityKey - The security key used by the Media Manager.  
# This security key must be the same in both the  
# collection server and media security servlet environments.  
MediaSecurityKey =
```

8. Enter a matching value for the MediaSecurityKey property.
9. Save, then restart your Collection Manager and Tomcat.



# Configuring the XML Gateway

---

The Insight XML Gateway is installed by default. Once the XML Gateway has been installed, it needs to be configured.

## Configuring the XML Gateway with a Username and a Connection to a User Manager

---

The Insight XML Gateway acts like the Insight Java Client. It is configured with a User Manager Address, a Username, a Password, and License-File Directory. By default, these are the only required configuration properties.

- 1) Locate the XML Gateway configuration file (web.xml). The web.xml file is located in the WEB-INF directory of the XML Gateway installation directory.
- 2) Open the web.xml file in your preferred text editor.
- 3) Change the User Manager Address.
  - a. Locate the following lines in the web.xml file:

```
<param-name>UserServerAddress</param-name>  
<param-value>localhost</param-value>
```

- b. Change "localhost" to match the address of your Insight User Manager.

- 4) Change the username and password.
  - a. Locate the following lines in the web.xml file.

```
<init-param>  
  <param-name>username</param-name>  
  <param-value>test</param-value>
```

```
<description>Username for User Manager  
authentication.</description>  
</init-param>  
<init-param>  
  <param-name>password</param-name>  
  <param-value>test</param-value>  
  <description>Password for User Manager  
  authentication.</description>  
</init-param>
```

- b. Set the username parameter to match a valid username on your User Manager.
  - c. Set the password parameter to match the valid password for the username used above.
- 5) If you have upgraded from a previous version of the XML Gateway, change the ResponseSystemID parameter to <http://www.lunaimaging.com/support/dtd/insightXMLGateway/v6.2/insightresponse.dtd>.
- 6) Restart Tomcat.
- 7) Run the XML Gateway Tester (for more information on the XML Gateway Tester, please see (Testing the XML Gateway on page 216)).

## Configuring the Simple Search Example Servlet

---

Insight ships with an example servlet on the Installation CD to help you get started with the XML Gateway. For more information on the simple search example servlet, please see the “**utilities**” directory on the Installation CD.

# Deploy Director

---



DEPLOY DIRECTOR IS NO LONGER SUPPORTED BEYOND 5.6

Deploy Director had previously been added to the Insight Suite of software to address two needs: Web Initiation of the Insight Java Client and centralized management control of the Insight Java Client.

Web-Initiated Insight enables centralized, automated, and incremental deployment and updating of Insight. Remote Launch Strings created on the web can be used to invoke the Insight Java Client to display specific collections, searches, groups, and images in either the Group Window or Image Workspace.

This document will show you how to Install your previously purchased Deploy Director on your server and customize the installation for your institution.

**NOTE:** Deploy Director is not required for Insight to function. This is an optional tool that was previously available to add functionality to the Insight software. **It is no longer available.**

## Installation of Deploy Director

---



DEPLOY DIRECTOR IS NO LONGER SUPPORTED BEYOND 5.6

Deploy Director is a third party application with its own set of documentation (ddadminguide.pdf in the root directory of the Insight Deploy Director CD), including

installation instructions. Deploy Director is a Java servlet application and is distributed with a standalone version of Apache Tomcat 4.1.



**It is EXTREMELY important that you follow the instructions below to set up Deploy Director to work with Insight. Do NOT customize the Deploy Director Installation of insight unless directed to do so.**

To start the installation, go to the Deploy Director CD, and find the installer for your platform in the root directory:

**Windows:** windows\_dd\_260.exe  
**Solaris:** solaris\_dd\_260.bin  
**Linux:** linux\_dd\_260.bin

- 1) Launch the Installer.
- 2) Click **Next** at the Introduction panel.
- 3) Agree to License.
- 4) Click **Next**.
- 5) Choose **ALL** from the **Choose Product Feature** panel.
- 6) Click **Next**.
- 7) Specify the Installation path.
- 8) Click **Next**.
- 9) Specify the installation properties.
- 10) Click **Next**.
- 11) Click **Install**.
- 12) Wait for the installation process to complete.

Immediately after the installation process, the Deploy Director Configuration Wizard will launch. If it does not, launch it manually from the following location.

(DD\_HOME)/standalone/bin/wizard.[bat|sh]

where:

- (DD\_HOME)  
is the installation directory (from Installation path)
- /standalone/bin/  
is the path to the Configuration Wizard within the Deploy Director directory tree
- wizard.[bat|sh]  
is the Configuration Wizard itself, use either of
  - **wizard.bat** for Windows
  - **wizard.sh** for Unix

Once the Wizard starts, follow the instructions below:

- 1) Click **Next** at the Introduction panel.
- 2) At the JDK Selection panel, click **Update** to locate your installed JDK. Click the most recently installed JDK, then click **Next**. You will notice a funny path to a JDK located in a sub-directory of (DD\_HOME) - the DD installation

directory. *This is not correct.* Navigate to and select the correct JDK in (DD\_HOME)/jdk

- 3) At the **Identification of Server** panel (seen below), specify the **Machine Name** where Deploy Director is installed. The machine name should be registered with the network. The reverse lookup for the machine's address should return the given name. (i.e. **deploy.lunaimaging.com** is Luna Imaging's DeployDirector server. This domain name resolves to **63.236.2.206**, which is the primary IP of the machine.) Once you have specified the **Machine Name**, click **Next**.

The screenshot shows the 'Identification of Server' panel of the DeployDirector Configuration Wizard. On the left, a text box provides instructions: 'Welcome to the server identification page. This information should correspond to the machine that you are currently working on, since it should be the intended server. The machine name that you enter should be registered with the network to this machine. (i.e. A reverse look-up for this machine's address should return the given name.) The default settings define a normal http server listening on port 8080 with the servlet located in the virtual path "/servlet". If you choose to customise the settings, you may switch the servlet to SSL (https), ...'. The main area contains a 'Machine name' text field, a 'Server Configuration' section with 'Use Default Settings' checked, and checkboxes for 'Enable SSL' and 'Enable SHA-1 encoding'. Below these are fields for 'Port' (8080), 'Admin Page' (/servlet), a 'Protocol' dropdown (http), and a 'Certificate' field with a 'Generate new Certificate' button. At the bottom are navigation buttons: '<< Previous', 'Next >>', 'Cancel', and 'Finish'.

- 4) At the **License** panel (seen below), click **Add License File** and navigate to the directory containing the license file you requested from Luna (see Error! Reference source not found. on page **Error! Bookmark not defined.**). Select the license file. The contents of the license should appear in the dialog window. Once the license has been loaded, click **Next**.

The screenshot shows the 'License' panel of the DeployDirector Configuration Wizard. On the left, a text box explains: 'If you have a new license to enter, it is easiest to allow the Configuration Wizard to read it directly from a file. If you do not have a license, please use the "Obtain License File" button to receive an evaluation license. If you have an evaluation license, you can use the "Buy Now" option to contact our Sales Representatives.' The center area displays a list of license details, all marked as 'Not Applicable': Serial Number, Hosts, Product, Type, Bundles, Clients, Applications, Expiry, License Version, and Quest License Version. On the right, there are four buttons: 'Add License File', 'Buy Now', 'Obtain License Now', and 'Product Site'. At the bottom are navigation buttons: '<< Previous', 'Next >>', 'Cancel', and 'Finish'.

- 5) At the **Administrator E-mail** panel (seen below), click **Next**. This function is not necessary for Insight deployment, but you are free to make changes.

- 6) Click **Next** at the **Configuration Summary**.
- 7) Click **Finish** to save your configurations.

**Note:** If you already have an application running on port 8080, you will need to modify Deploy Director's default port setting. The port definition can be found in:

`(DD_HOME)/standalone/conf/server.xml`

Open the file in a text editor, then modify the **<Connector>** port parameter from **8080** to **8082**, or any other open port you may wish. Save the file. If you should need to modify the port, you will need to run through the Deploy Director Configuration Wizard and define the correct port at the **Identification of Server** panel.

## Configuring Deploy Director for Insight



DEPLOY DIRECTOR IS NO LONGER SUPPORTED BEYOND 5.6

On the Deploy Director CD, find the `deploydirector_updates` directory. Copy & paste the three subdirectories into the root of the Deploy Director installation directory (`DD_HOME`). When asked if you would like to overwrite the existing files, click **Yes to All**. Once the file copy process has completed, launch Deploy Director.

## Starting Deploy Director and the Deploy Director Administrative Client

### On Windows

Launch Deploy Director from

**Start -> DeployDirector -> Start DeployDirector.**  
Launch Deploy Director Admin  
**Start -> DeployDirector -> DeployDirector Admin.**

## On Solaris / Linux

Launch Deploy Director.

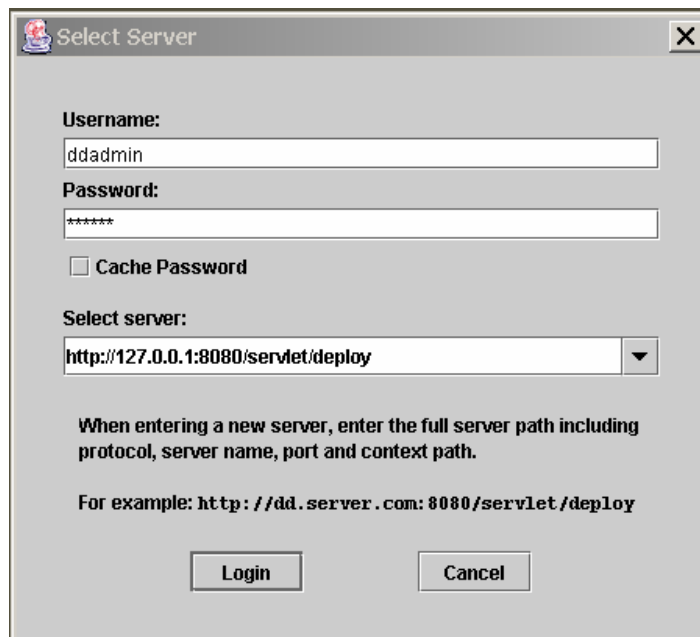
```
(DD_HOME)/standalone/bin/startup.sh
```

**Note:** you may need to set execute privileges for this file.

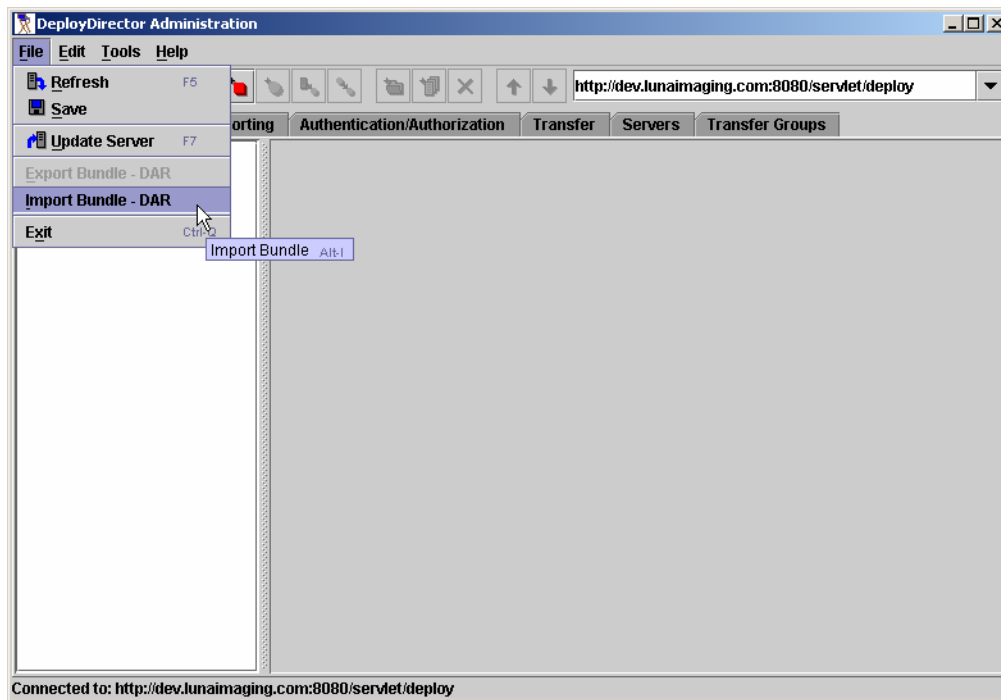
Launch Deploy Director Admin.

```
(DD_HOME)/DDAdmin/DeployDirectorAdmin
```

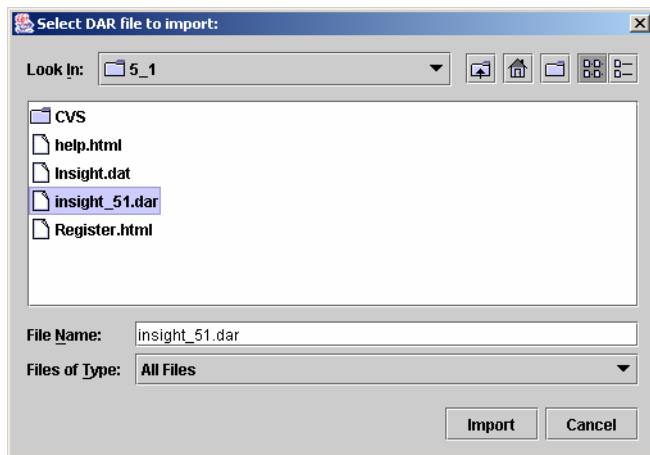
- 1) Once you Launch Deploy Director Admin, you will be presented with a Login screen.



- 2) Enter username: **ddadmin** Password: **f3nd3r**. These are defaults, and should be changed later.
- 3) For **Selected server**, provide the server name entered in the **Identification of Server** panel of the Deploy Director Configuration Wizard. An example is given in the panel.
- 4) Click **Login**.
- 5) Under the **File** menu, select **Import DAR**. Find and select the following file on the Deploy Director CD:



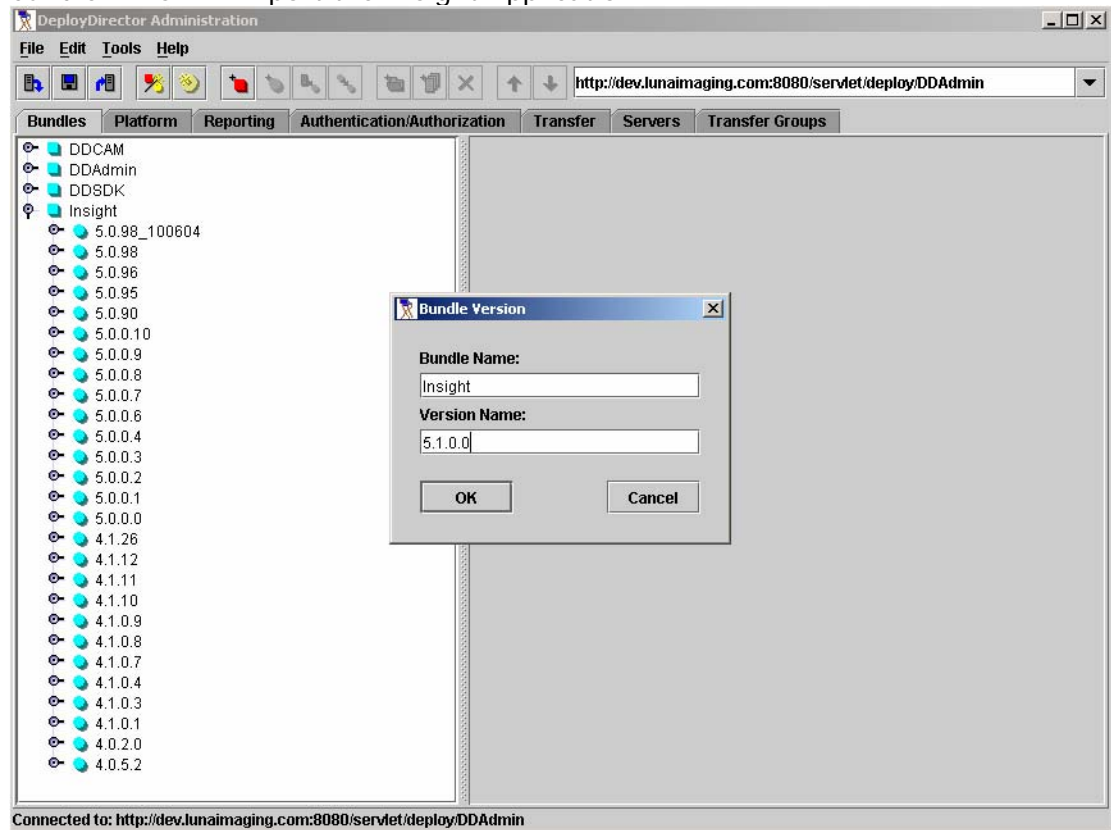
- 6) Locate the **insight\_51.dar** file on the Insight Deploy Director CD (in **\bundles\insight\insight\_51.dar**).



- 7) You will then be presented with the **Bundle Version** window. **Bundle Name** and **Version Name** should be pre-populated. Click **OK** to import Insight as a



bundle. This will import the Insight Application.

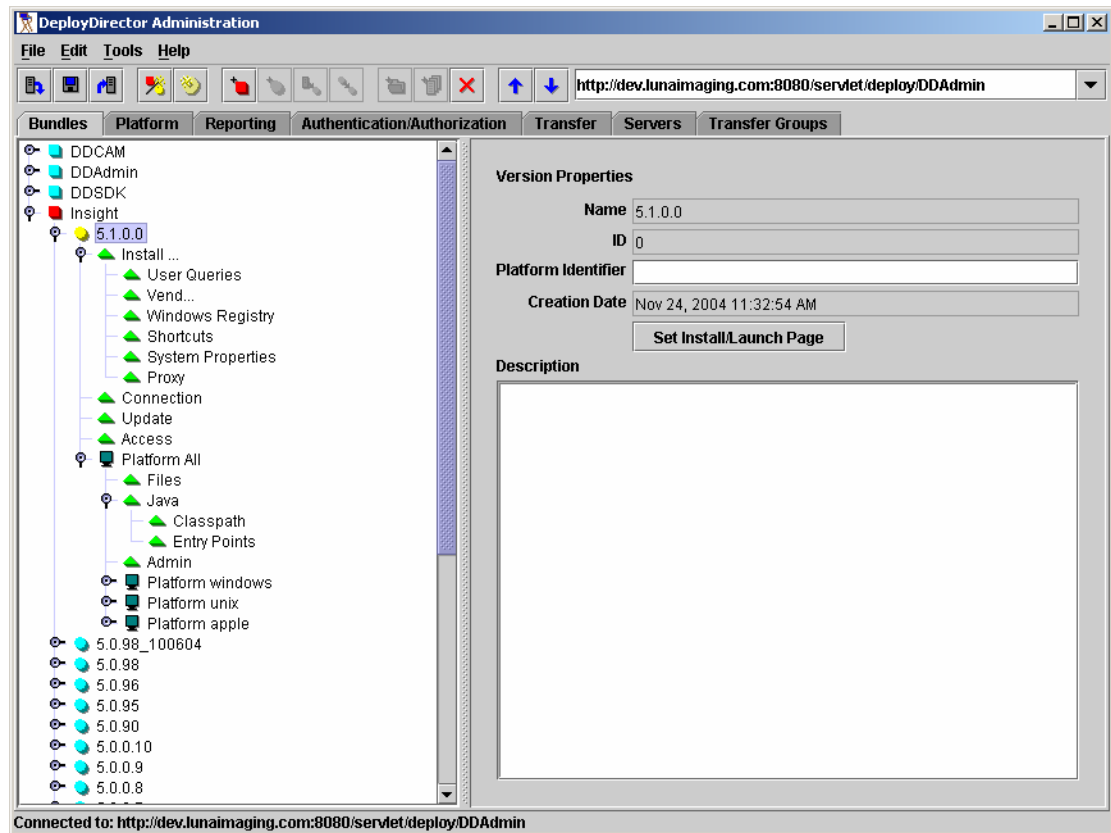


## Customizing the insight.dat file for use within Deploy Director

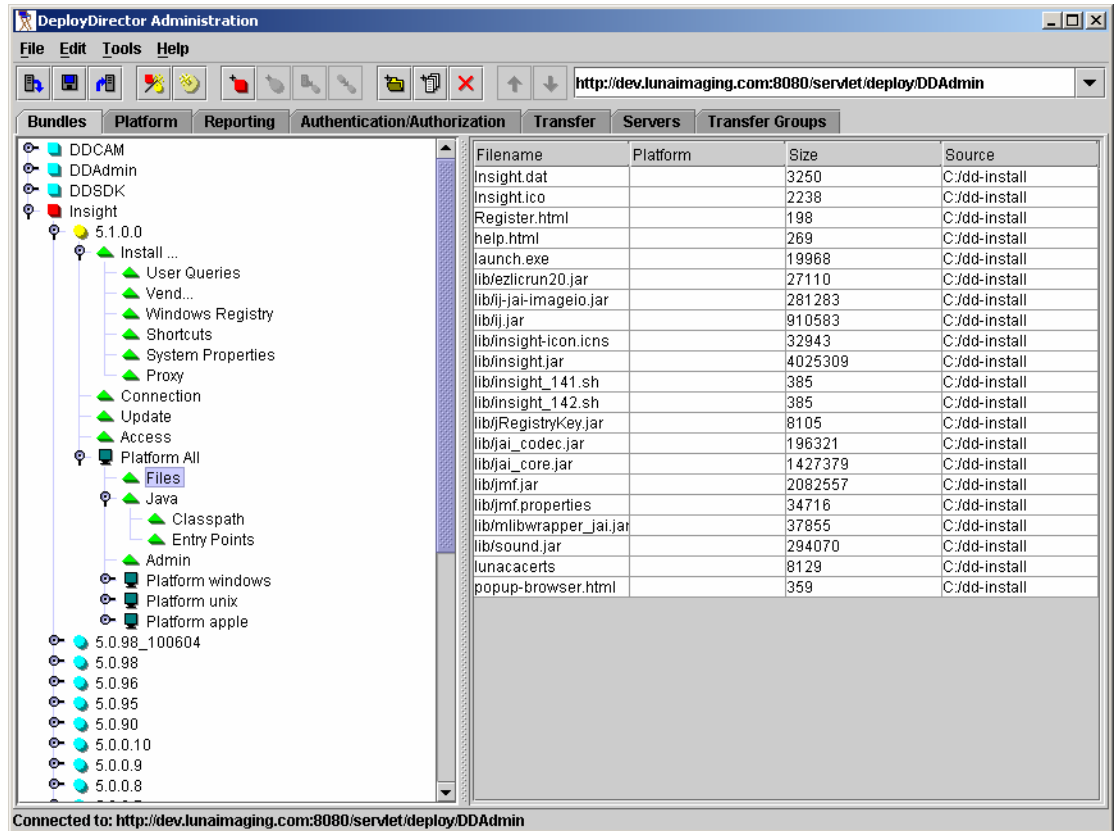
Before you can use the bundled version of the Insight Java Client, you must first customize Insight's configuration file to point to your User Manager. For more information on customizing the Insight.dat configuration file, please refer to the "Advanced Configuration of the Insight Java Clients" document.

To replace the bundle's Insight.dat configuration file with your own:

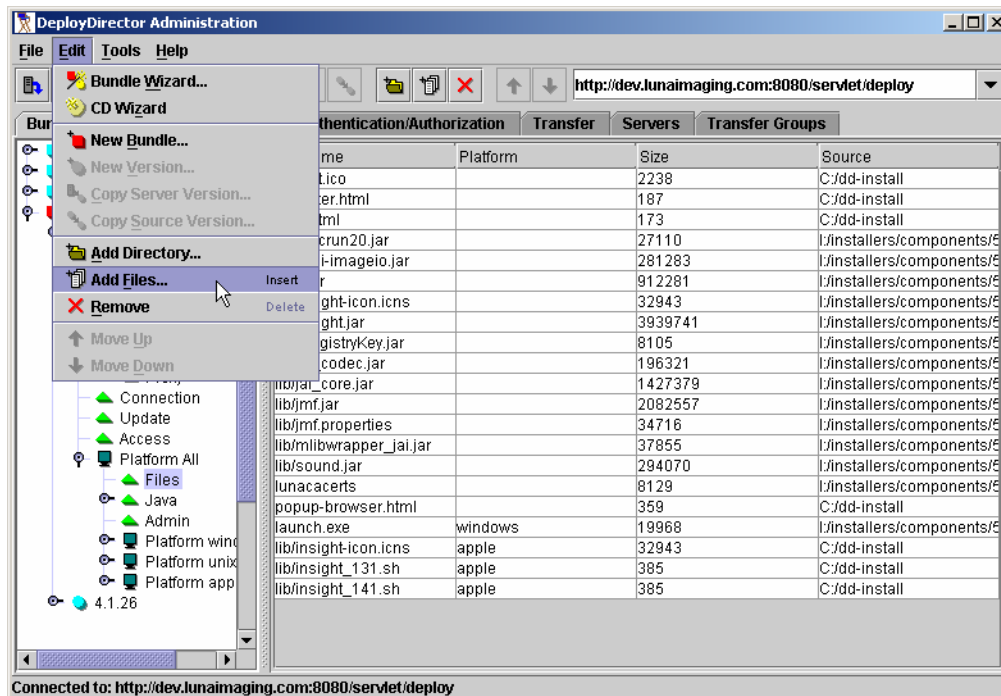
- 1) Click the **Insight bundle** node under the **Bundles** tab in the Deploy Director Admin Tool.
- 2) Expand the node and select the **6.2.0.0** bundle.



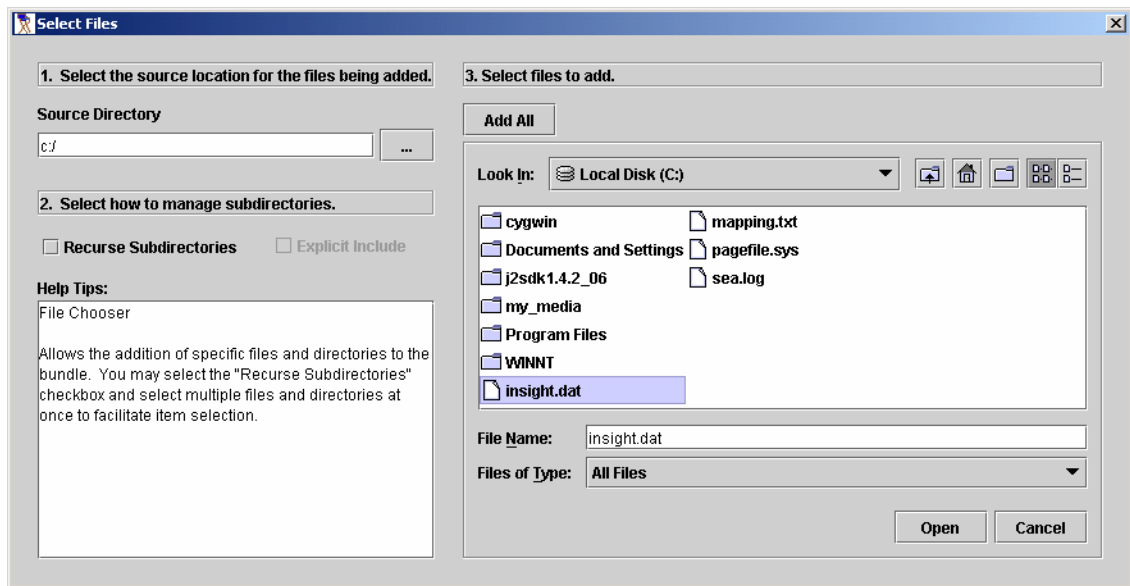
- 3) Drill down on the tree **6.2.0.0** -> **Platform All** -> **Files**.
- 4) In the right frame, delete **insight.dat** from the files list.
  - a. See [Changing the Default User Manager Address or adding additional User Managers](#)



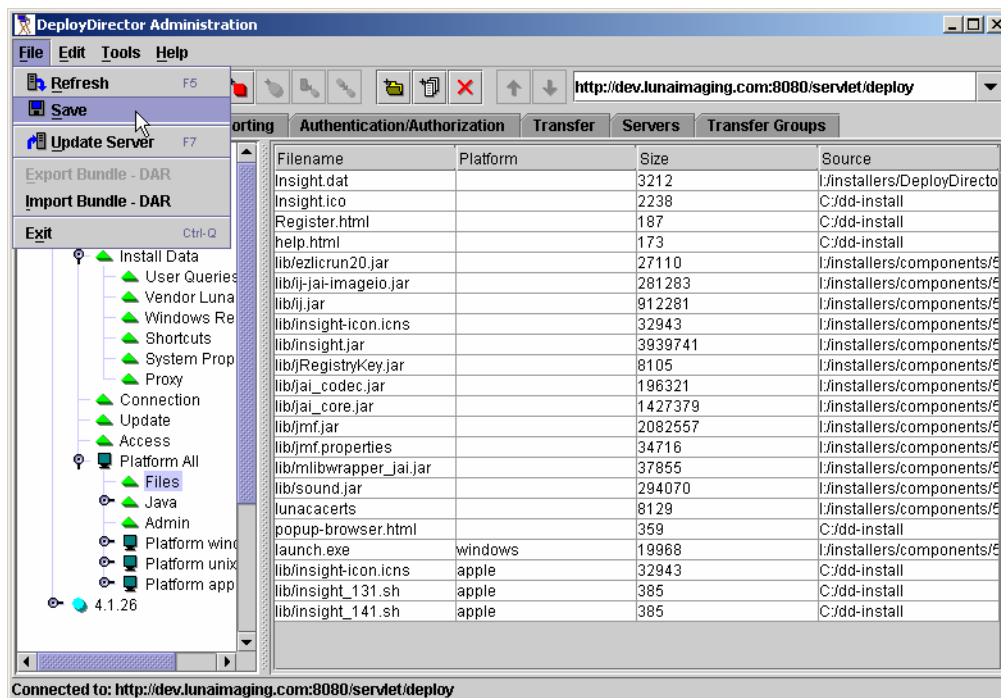
- 5) Next, go to **Edit** -> **add files** and navigate to the location to which you saved your customized **insight.dat** file.



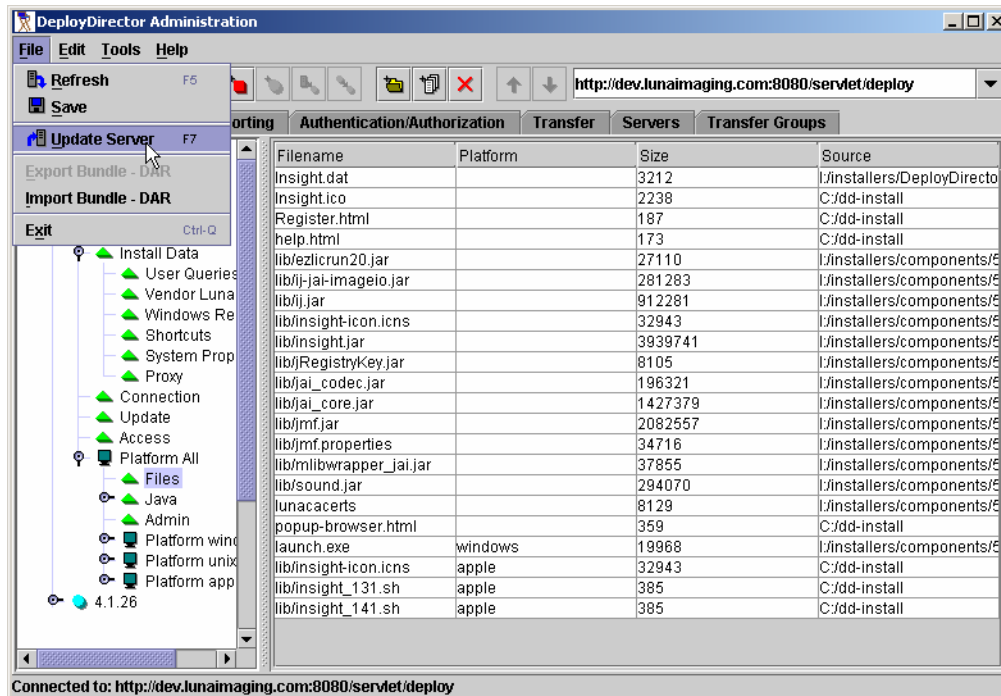
Double click on **insight.dat** to add it to the bundle.



- 6) Once you have replaced the insight.dat configuration file go to **File -> save** to save the bundle.

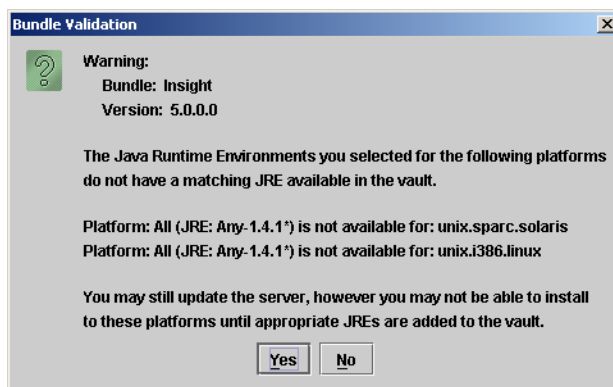


- 7) Once the bundle has been saved, go to **File -> update server** to upload it.



8) This will publish the updated bundle and make it available to download. Finally, you must update the DDCAM.

9) **NOTE:** you may see a warning similar to the one below, choose “yes”



### To Import the new version of the DDCAM:

- 1) The final step in installing Deploy Director is to update Deploy Director's DDCAM (Client Application Manager) with one customized for Insight.
- 2) To update the **DDCAM**:
- 3) Select **File -> Import DAR** from the menu.
- 4) Navigate to the Deploy Director CD, locate and select:

**\bundles\ddcam\ddcam.dar**

- 5) This will import the updated version of the **DDCAM**.
- 6) Once the DAR has uploaded successfully,
- 7) go to **File -> update server**. This will publish the new bundles.

The Installation and configuration process for Deploy Director is now complete.

## Verifying your Installation

To verify that the installation was successful, open your web browser and go to:

```
http://<installedhost>:8080/servlet/deploy/insight/launch
```

Upon initial log-in to the page, you will be presented with a Digital Certificate signed by Luna Imaging. After accepting the certificate, Deploy Director will install the necessary files and then launch Insight. When the Insight splash screen appears after the installation process, you know you are ready to deploy Insight.

## Enabling Deploy Director's Remote Launch Functionality

To enable Deploy Director's Remote Launch Functionality, you must edit your Insight Collection Manager's InsightServer.dat to set the default Remote Launch URL, and second, update the Remote Launch URL for any existing collections.

To change the default Remote Launch URL in your Server Configuration File:

- 1) Locate your Collection Manager's Default Installation Directory.
- 2) Open the InsightServer.dat configuration file in a text editor.
- 3) Locate the JVARemoteLaunchURL parameter.
- 4) Change the value to match the URL for Deploy Director. This should be the HOSTNAME + : + PORT + /servlet/deploy/insight/launch + ? + U= + USER\_MANAGER\_ADDRESS + &

**NOTE:** replace **HOSTNAME** with the hostname for Deploy Director's instance of Tomcat

**NOTE:** replace **PORT** with the **PORT** for Deploy Director's instance of Tomcat

**NOTE:** replace **USER\_MANAGER\_ADDRESS** with your User Manager Address

```
http://deploy.lunaimaging.com:8080/servlet/deploy/insight/launch?U=insightuser.lunaimaging.com&
```

5) Save the InsightServer.dat configuration file.

6) Restart your Collection Manager.

To change the Remote Launch URL in an existing Collection:

- 1) Start the Insight Administrator Tools and connect to your Collection Manager.
- 2) For each collection in your Collection Manager you choose to update the Remote Launch URL for the Java Client in, complete the following steps:
  - a. Open the Collection Settings Node.
  - b. Open the Collection Configuration Node.
  - c. Right click on the collection information and select "edit".
  - d. Set the "Web Initiated Insight Java Client URL" to the same value you placed in the InsightServer.dat file above.
  - e. Click Save.

## Post Installation

---

### Changing Administrator Password

Refer to the ***Deploy Director Installation and Configuration*** document for instructions on changing your Admin password (ddadminguide.pdf in the root of the Deploy Director CD).

### Online Administration Page

**http://<installedhost>:8080/servlet/admin/index.jsp**

## Upgrading the Insight Client Bundle to 5.6

---



DEPLOY DIRECTOR IS NO LONGER SUPPORTED BEYOND 5.6

To upgrade the Insight Client Bundle to 5.6 from a previous version, you must upload the new bundle, customize the dat file and publish it. You must also update the bundled JRE. Users who are currently running version 4.1 or prior will be prompted to update their clients the next time they start Insight.

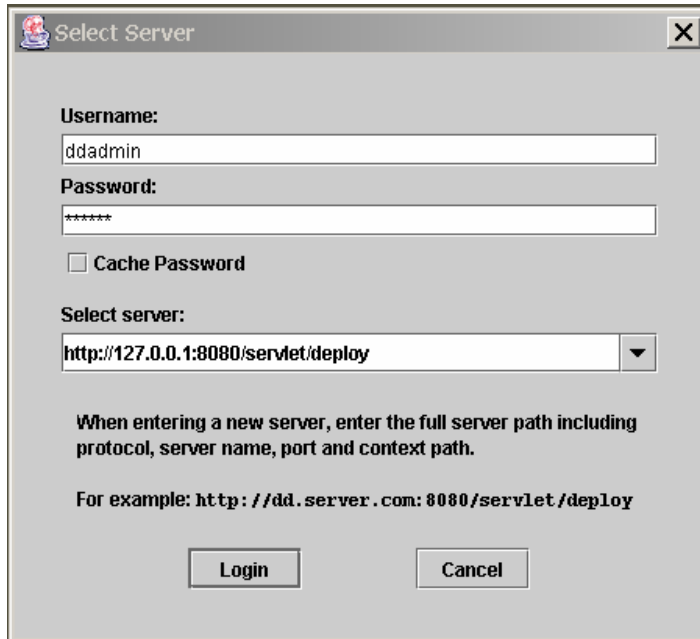
To update the Deploy Director Bundle:

- 1) Launch Deploy Director Admin.

(DD\_HOME)/DDAdmin/DeployDirectorAdmin.

- 2) You will be presented with a Login screen:





**Select Server**

**Username:**  
ddadmin

**Password:**  
\*\*\*\*\*

☐ Cache Password

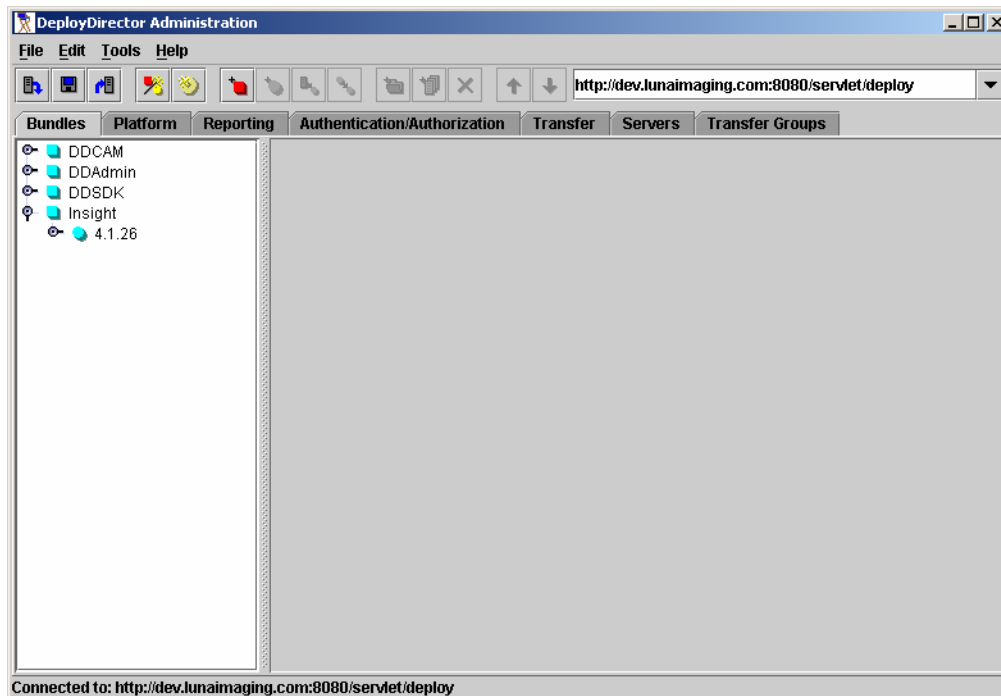
**Select server:**  
http://127.0.0.1:8080/servlet/deploy

When entering a new server, enter the full server path including protocol, server name, port and context path.

For example: http://dd.server.com:8080/servlet/deploy

Login Cancel

- 3) Enter username: **ddadmin** password: **f3nd3r** (or your password if you have already changed it). For **Select server**. Enter the URL to the Deploy Director installation directory. See the example in the panel above.
- 4) Click **Login**.



- 5) Select **File | Import DAR** from the menu. Navigate to Deploy Director CD, find and select the following file:

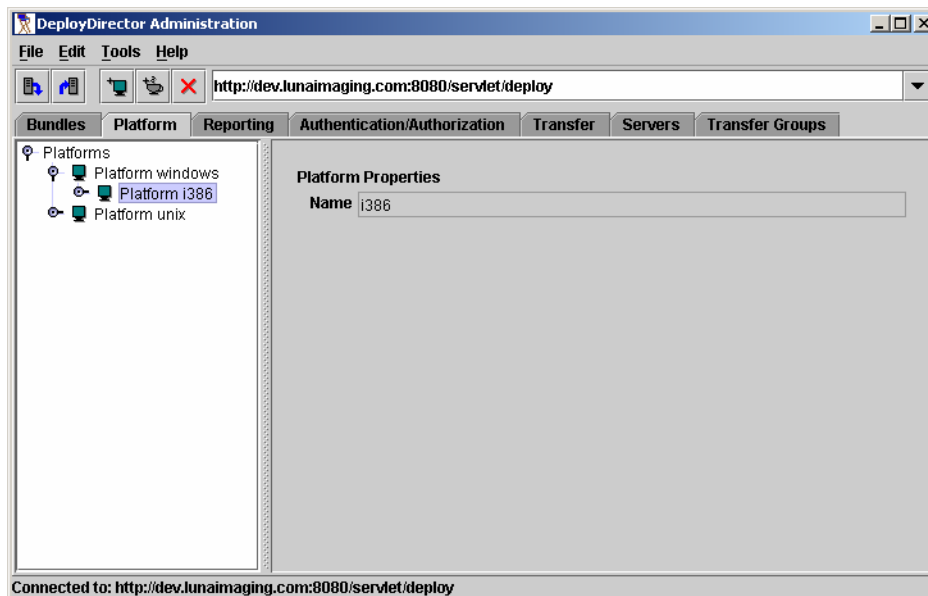
\bundles\insight\insight\_51.dar

- 6) You will then be presented with the **Bundle Version** window. The **Bundle Name** and **Version Name** should be pre-populated.
- 7) Click **OK** to import Insight as a bundle.
- 8) Once the bundle has been imported, you must again customize the bundle with your User Manager information and other settings and update the bundled JRE. Please see Customizing the insight.dat file for use within Deploy Director on page 245 for more information.

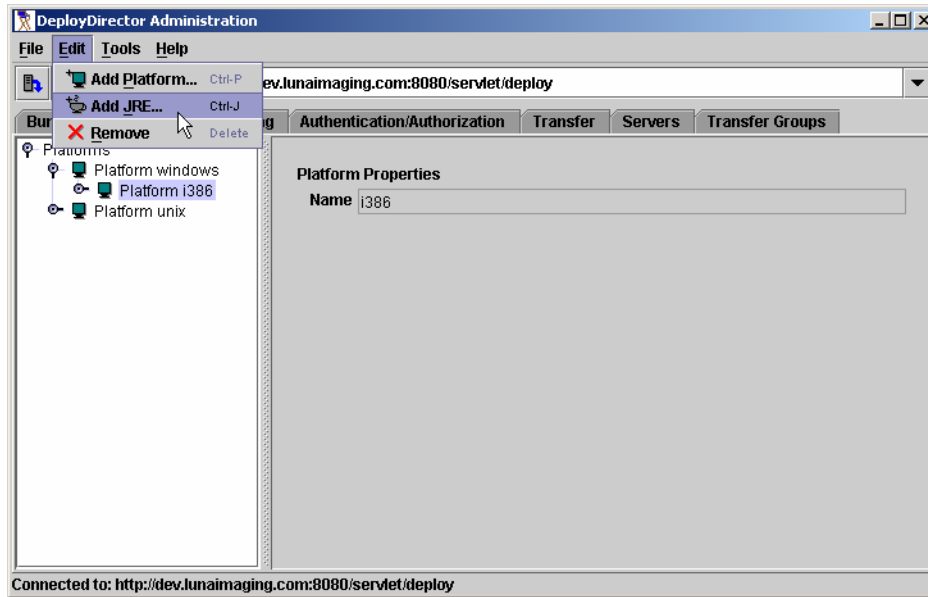
To Update the JRE Bundle

The final step in upgrading Insight to 5.x is to add the 1.4.1 JRE Bundle.

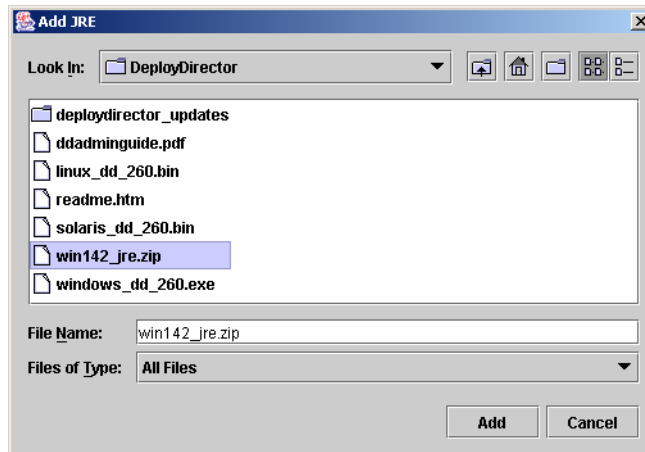
- 1) Once you have updated the Insight DAR file, click on the platform tab.



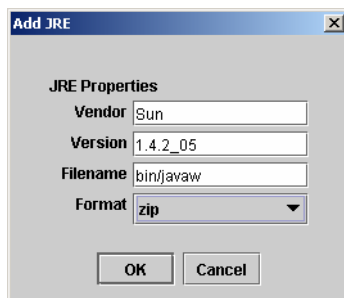
- 2) Go to **Edit -> add JRE**.



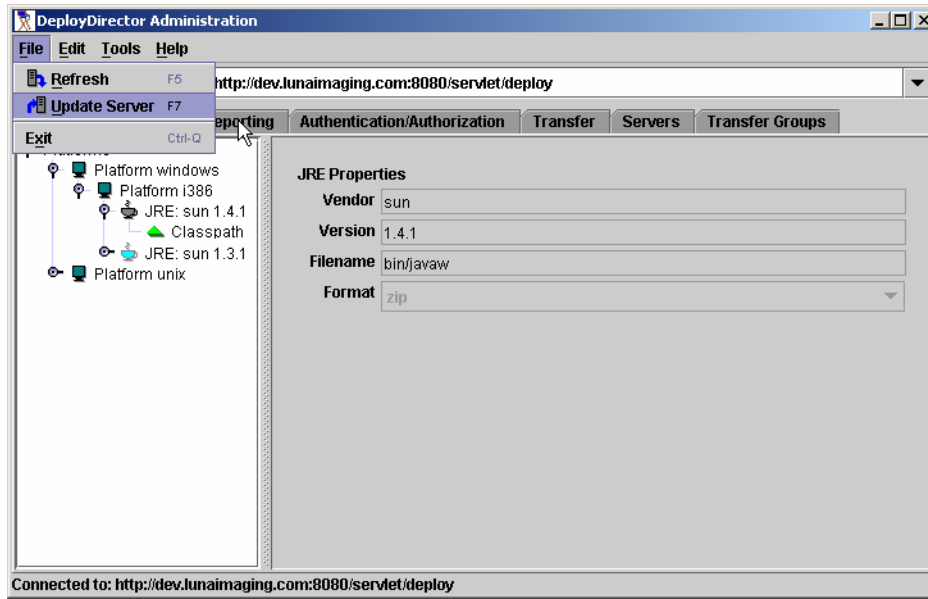
- 3) Browse to the **win142\_jre.zip** file (located at the root of the Deploy Director CD).



- 4) Press add, and then fill in the following information.



- 5) Finally, choose **File -> Update Server** to update the JRE file on the server.



6) Close Deploy Director and press save.

# Configuring BrowserInsight to Use SSL

---

HTTP over SSL (or Secure Socket Layer) provides enhanced security around Insight's login functionality. When enabled, users who load the login page for BrowserInsight are redirected to a Secure HTTP Connection (over SSL), where they login, and are then passed back to the BrowserInsight Application. This situation is ideal for Single-Sign-On Situations where usernames and passwords provide greater access to Institutional Resources than Insight.

**NOTE:** The Insight 5.x Suite Installer will pre-configure many of these settings for you according to your installation choices. In many cases you may simply have to uncomment the existing values.

To enable SSL with the bundled version of Tomcat 5.0:

- 1) Open Tomcat's server.xml (located in the tomcat/conf directory).
- 2) Locate the section on the SSL Connector (as follows).

```
<!-- Connector port="8443"
      maxThreads="150" minSpareThreads="25"
maxSpareThreads="75"
      enableLookups="false" disableUploadTimeout="true"
      acceptCount="100" debug="0" scheme="https"
secure="true"
      keystoreFile="path/to/your/keystore"
      keystorePass="keystore password"
      clientAuth="false" sslProtocol="TLS" / -->
```

- 3) Uncomment the connector for SSL so the line looks like this:

```
<Connector port="8443"
```

```

        maxThreads="150" minSpareThreads="25"
maxSpareThreads="75"
        enableLookups="false" disableUploadTimeout="true"
        acceptCount="100" debug="0" scheme="https"
secure="true"
        keystoreFile="path/to/your/keystore"
        keystorePass="keystore password"
        clientAuth="false" sslProtocol="TLS" />

```

- 4) Follow the instructions on <http://jakarta.apache.org/tomcat/tomcat-5.0-doc/ssl-howto.html> for information on how to create a keystore.
- 5) Change the keystoreFile parameter to match the path to your keystore file.
- 6) Change the keystorePass parameter to match the password you created for your keystore.
- 7) Save the server.xml configuration file.
- 8) Restart Tomcat.

To enable SSL during login:

- 1) Configure your servlet container (Resin or Tomcat) to use SSL. See your Resin or Tomcat documentation for directions on configuring and testing SSL. Note the port number on which SSL is configured.
- 2) Once the servlet container is properly listening for SSL connections on the specified port, open the BrowserInsight.conf, located in the root of the BrowserInsight installation directory.
- 3) Locate the following lines:

```

#-----
# SSL Security Settings
#-----

# to enable secure login uncomment and update the
# following lines

#LoginSSL = yes
#SecureDomain = https://browserinsight.lunaimaging.com:8085
#StandardDomain = http://browserinsight.lunaimaging.com:8080

```

- 4) Uncomment the **LoginSSL** property and set it to 'yes' in your BrowserInsight.conf.
- 5) Uncomment the **SecureDomain** property and set it to match the domain on which the Secure version of BrowserInsight is running. Commonly, the secure domain is composed of the protocol (https) + the host running BrowserInsight + the servlet container's SSL port number. For example, if your domain name is host.mydomain.com and your servlet container's SSL port is 8085, specify SecureDomain as: <https://host.mydomain.com:8085/>

**NOTE:** If you are using the standard HTTPS port, 443, you may omit the port definition for the SecureDomain property, as seen in the example above.

- 6) Uncomment the **StandardDomain** property and set it to match the domain on which the unsecured version of BrowserInsight is Running, commonly this is preset for you.
- 7) Save the BrowserInsight.conf file and continue with the steps below, specific to your servlet container.

## Additional Installation Instructions for Resin

---

- 1) Open the resin.conf file located in the <resin\_install>/conf directory.
- 2) Search for the line beginning with "<session-config" in the resin.conf file, it should look something like the following:

```
<session-config enable-cookies='true' enable-url-rewriting='false'
session-timeout='30' />
```

- 3) If **LoginSSL** is set to "yes" in BrowserInsight.conf, then the above line must be changed to the following:

```
<session-config enable-cookies='true' enable-url-rewriting='true'
session-timeout='30' cookie-domain='.mydomain.com' />
```

- 4) The dot (.) character preceding 'mydomain' is required. Be sure to change 'mydomain' to the domain under which BrowserInsight is running.

**NOTE:** Setting 'enable-url-rewriting' to true, as shown above, has the effect that users who have disabled cookies in their web browser will still be able to use BrowserInsight.

- 5) Restart Resin after modifying resin.conf.

## Additional Installation Instructions for Apache's Tomcat 4.x

---

- 1) Open the server.xml file located in the <tomcat\_install>/conf directory.
- 2) Search for "BrowserInsight" in the server.xml file, it should look like the following:

```
<Context className="org.apache.catalina.core.StandardContext"
crossContext="false" path="/BrowserInsight" debug="3"
reloadable="true" docBase="<browser install dir>"
defaultSessionTimeout="30">
```

- 3) When using Tomcat with SSL, cookies may not be used to track user sessions. Disable cookies by changing the above line to the following:

```
<Context className="org.apache.catalina.core.StandardContext"
crossContext="false" path="/BrowserInsight" debug="3"
```

```
reloadable="true" docBase="<browser install dir>"  
defaultSessionTimeout="30" cookies="false">
```

- 4) Restart Tomcat after modifying server.xml.



# Using your own version of Apache's Tomcat or using Caucho's Resin

---

Insight 6.2 ships with a customized version of Apache's Tomcat 5.0 running on the Sun JDK 1.4.2. If you'd like to use your own version of Tomcat, or Caucho's Resin Application Server, manual configuration will be required.

## Prerequisites

---

The Insight Servlet Components maintain a few prerequisites for running. These include a specific version of Sun's JDK (1.4.2) and specific versions of Tomcat or Resin.

### Supported versions of Sun's JDK

Luna currently supports Sun's JDK version 1.4.2.



**WARNING:** The Insight Servlet Components will not run on versions of the JDK earlier than 1.4.2.

### Supported versions of Tomcat

Luna currently supports Insight running on Tomcat versions 4.x and 5.0.x.

### Supported versions of Resin

Luna currently supports Insight running on Resin 3.x.

## Insight Servlet Components

---

Insight includes three separate Servlet Components that run inside basic servlet contexts:

**BrowserInsight** – a Browser based thin client.

**Media Manager** – The Insight Media Manager provides integrated support for uploading serving Insight Media content (including JPEG2000 Files).

**XML Gateway** (optional) – a REST Based XML Gateway that facilitates searching of Insight collections from XML aware applications.

### Locating the Servlet Components Context Files

Each Insight Servlet context is installed into its own directory with the server installation. The components are located in the following Directories:

```
Media Manager Location - LunaImaging/5.x/media manager/Support/
BrowserInsight Location - LunaImaging/5.x/browserInsight/Support/
XML Gateway Location - LunaImaging/5.x/xmlgateway/Support/
```

In each directory is a support directory with the following two files:

```
/Support/Tomcat_conf_additions.txt
/Support/Resin_conf_additions.txt
```

Each file represents the required additions to **Tomcat** or **Resin** to enable the Insight servlet components.

## Configuring the Insight Servlet Components to Run in a Custom Version of Tomcat

---

### Adding the Insight Servlet Contexts to the Tomcat 4.x server.xml

The following instructions assume a new installation of Tomcat. If you have modified the default Tomcat configuration, the steps required to configure Tomcat to run the Insight Servlet Components may be different.

- 1) Locate your Tomcat Installation Directory.
- 2) Locate the server.xml file located in the conf/ directory inside the Tomcat Installation Directory.
- 3) Open the server.xml file in your preferred text editor locate the following:

```
'<Context path="" docBase="ROOT" debug="0"/>'.
```

- 4) Copy the contents of each of the "Tomcat\_conf\_addition.txt" files (located in the support directories of the servlet's (see above for more information)

and paste them under the above location. The result should look like this:

```
<Context path="/" docBase="ROOT" debug="0"/>
<Context className="org.apache.catalina.core.StandardContext"
crossContext="false" path="/BrowserInsight" debug="0"
reloadable="true" defaultSessionTimeout="30"
docBase="C:\Program Files\LunaImaging\5.x\browserInsight\servlet\">

<Logger className="org.apache.catalina.logger.FileLogger" debug="0"
verbosity="1" prefix="localhost BrowserInsight log." directory="logs"
timestamp="true" suffix=".txt"/>
</Context>
```

**NOTE:** If you are adding more than one of the Insight Servlet components, you'll have to repeat the above steps for each component.

5) Restart Tomcat.

### Adding the required Libraries to Tomcat's Library Path

The Insight Media Server requires some external shared libraries that must be loaded by the JDK (Java SDK). These libraries need to be placed in the Java Library Path (specified by the `java.library.path` or `LD_LIBRARY_PATH` environment variable).

### Configuring Java Imaging Properties for Solaris and Linux

Note you will need to add the following extra launch parameter to the instance of Java running tomcat (`-Djava.awt.headless=true`).

### Adding the Insight Servlet Contexts to an Instance of Tomcat 5

Rename each of the `tomcat_conf_additions.txt` to something a bit more identifiable and copy each one into `Catalina/localhost/`.

### Adding the Required Libraries to Tomcat's Library Path

The Insight Media Server requires some external shared libraries that must be loaded by the JDK (Java SDK). These libraries need to be placed in the Java Library Path (specified by the `java.library.path` or `LD_LIBRARY_PATH` environment variable).

#### On Windows:

Edit the `Catalina.bat` file used to startup Tomcat. Add the following line to the beginning:

```
SET JAVA_OPTS=-Djava.library.path="<insight-install-
dir>\media_manager\support\win32"
```

**NOTE:** If you have spaces in your filepath, you should keep the quotes.

#### On Linux:

Edit the `Catalina.sh` file used to startup tomcat, add the following line to the beginning:

```
JAVA_OPTS=-Djava.library.path=<insight-install-dir>\media_manager\support\Linux-gcc
```

#### **On Solaris:**

Edit the Catalina.sh file used to startup Tomcat. Add the following line to the beginning:

```
JAVA_OPTS=-Djava.library.path=<insight-install-dir>\media_manager\support\Solaris-gcc
```

### **Configuring Java Imaging Properties for Solaris and Linux**

Note you will also need to add the following extra launch parameter to the JAVA\_OPTS as well:

```
(-Djava.awt.headless=true)
```

## **Configuring the Insight Servlet Components to run Caucho's Resin Application Server**

---

### **Adding the Insight Servlet Contexts to the resin.conf**

The following instructions assume a new installation of Resin. If you have modified the default Resin configuration, the steps required to configure Resin to run the Insight Servlet Components may be different.

- 1) Locate your Resin Installation Directory.
- 2) Locate the resin.conf file located in the conf/ directory inside the Resin Installation Directory.
- 3) Open the resin.conf file in your preferred text editor locate the following:

```
<host id=''>
```

- 4) Copy the contents of the file "Resin\_conf\_addition.txt" (located in the support directories of the servlet's (see above for more information) and paste them under the above location. The result should look like this:

```
<host id=''>  
<web-app id='/BrowserInsight' class-update-interval='2'  
app-dir='C:\Program Files\LunaImaging\5.x\browserInsight\servlet\' >  
</web-app>
```

**NOTE:** If you are adding more than one of the Insight Servlet components, you'll have to repeat the above steps for each component.

- 5) Restart Resin.

## Adding the Required Libraries to Resin's Library Path

The Insight Media Server requires some external shared libraries that must be loaded by the JDK (Java SDK). These libraries need to be placed in the Java Library Path.

### On Windows:

Copy the JPEG2000 libraries from the media\_manage/support/win32 directory into the bin directory of Resin.

### On Solaris / Linux:

Copy the JPEG2000 libraries from the appropriate subdirectory of the media\_manager/support directory either (linux-gcc or solaris-gcc) into the libexec folder in resin's application directory.

**NOTE:** The libexec directory is added by resin to the LIBRARY\_PATH).

## Configuring Java Imaging Properties for Solaris and Linux

Note you will need to add the following extra launch parameter to the instance of Java running tomcat

```
(-Djava.awt.headless=true)
```

## Testing your Custom Configuration

After restarting, test all of your existing Web Applications to ensure they run properly. If they are working, please refer to the respective sections of the Install and configuration guide for the servlet components you installed.

## Troubleshooting Errors with the XML Gateway

If you are having problems running the Insight XML Gateway, check the Tomcat log files.

### If you see this error in the log file:

```
InsightXMLGateway: Failed to get Class object for parser named  
"org.apache.xerces.parsers.SAXParser"
```

Then you need to add the XML Parser to you classpath. To do this:

- a. Locate the lib directory inside the support directory of your XML Gateway installation.
- b. Copy the three jar files (xml-apis.jar, xalan.jar, xercesImpl.jar ) into the lib directory, located in the servlet/WEB-INF directory

```
<installation_dir>/support/lib/xercesImpl.jar  
/xalan.jar  
/xml-apis.jar
```

into:

```
<installation_dir>/servlet/lib/
```

c. Restart tomcat/resin.

If any configurable value in web.xml is incorrect, the XML Gateway servlet will return an empty InsightResponse with a status message. The Tester may return a message similar to:

```
InsightXMLGateway: Failed connection to User Manager at address  
"localhost".
```

Check your web.xml and confirm that the username, password, and User Manager Address are correct.

Fix any error conditions identified, restart Tomcat/Resin, and navigate to the XML Gateway's Tester URL again.

## Troubleshooting Errors with Resin and the Media Manager

Resin does not always properly load the security library properly, to ensure it is loaded:

- 1) Locate the lib directory inside the installation directory of resin.
- 2) Copy the bcprov-jdk14-115.jar from the servlet\WEB-INF\lib directory inside the installation directory for the Insight Media Manager into the lib directory for resin.

```
<secure media server install_dir>\servlet\WEB-INF\lib\bcprov-jdk14-  
115.jar
```

copy to

```
<resin_installation_directory>\lib\ bcprov-jdk14-115.jar
```

# Debugging the Insight Server Components

---

If any of the Insight server components fail to start properly (either they're not allowing connections from Insight, Inscribe, or Insight Studio, or they aren't printing "Accepting Connections" in the console), it may be useful to increase Insight's debug level to help diagnose the problem.

**NOTE:** Regardless of the debug level, Insight will always print "Accepting Connections" on proper startup.

It is important to recall that when the installer completes, it has installed the components, it has not started them as running processes. They need to either be manually started (in console mode) or installed as services. We recommend testing the components as console mode processes until they have been verified as working properly, THEN running them as services.

**Problems, when they occur, generally fall into one of four categories:**

- Network Issues
  - Is the network running?
  - Is the device in question running?
  - Is the device accessible?
  - Is the port operational?
  - Are firewall restrictions getting in the way?
  - Have necessary network privileges been set up?
- Database Issues
  - Is the database service running?
  - Is the database service accessible?
    - Has a database username / password been established?
    - Does that username have the necessary permissions?

- Does the database exist?
  - Are we pointing at the right database?
  - Are there space issues?
- Configuration Issues
  - Are all parameters pointing where they should be?
  - Are all of the usernames, passwords, databases, hostnames, ports correct?
- File System Issues
  - Is there space on the target device?
  - Does the user have rights to write to the target device/directory?

Since most components are dependent on the User Manager, test it first. Then test the Collection Manager and Personal Insight Manager, then the Media Manager, BrowserInsight, and finally the XML Gateway.

## **Checking the Version of All Installed Components**

---

Insight 6.2 ships with a new tool to display the versions of each of the Insight Components. This tool is designed to assist with patch updates and help ensure that patches are installed and configured properly. One of the most common support problems is that different Insight server components are running using different versions.

To check the versions of all installed components:

- 1) Locate the Insight Installation Directory.
- 2) Open the "**utilities/check\_server\_version**" Directory.
- 3) Run "**checkInsightVersion.cmd**" or "**checkInsightVersion.sh**" (depending on which platform you're on).
- 4) This tool will run a script and print out the version of each of the components installed.
- 5) In the script, it will print out the name and location of each of the critical JAR files, as well as the build number and date.
- 6) Please confirm that each of the dates and versions match.



```

C:\WINNT\system32\cmd.exe

[echo] checking the version of your Insight components.
[echo] *****
[echo] * THIS WILL CHECK THE VERSION OF ANY *
[echo] * INSIGHT SERVER COMPONENT THAT'S *
[echo] * INSTALLED IN A DEFAULT LOCATION. IF *
[echo] * YOU HAVE INSTALLED CERTAIN INSIGHT *
[echo] * SERVER COMPONENTS IN ANOTHER LOCATION, *
[echo] * YOU WILL NEED TO CHECK THOSE SEPARATELY. *
[echo] * *
[echo] * TO ENSURE INSIGHT RUNS PROPERLY: *
[echo] * PLEASE CONFIRM THAT ALL OF THE VERSION *
[echo] * NUMBERS AND BUILD DATES ON EACH JAR *
[echo] * FILE MATCH. *
[echo] * *****

[echo] C:\Program Files\LunaImaging\5.1\browserInsight\servlet\WEB-INF\lib\insightserver.jar
[echo] v5.10<02> 23November2004

[echo] C:\Program Files\LunaImaging\5.1\collection_manager\mcilib\insights
erver.jar
[echo] Insight Smart Server - Build of v5.10<02> 23November2004

[echo] C:\Program Files\LunaImaging\5.1\media_manager\servlet\WEB-INF\lib\insightserver.jar
[echo] v5.10<02> 23November2004

[echo] C:\Program Files\LunaImaging\5.1\personal_insight_manager\pmi\lib\insightserver.jar
[echo] Insight Smart Server - Build of v5.10<02> 23November2004

[echo] C:\Program Files\LunaImaging\5.1\user_manager\lib\insightserver.jar
[echo] Insight User Server - Build of v5.10<02> 23November2004

[echo] C:\Program Files\LunaImaging\5.1\xmlgateway\servlet\WEB-INF\lib\insightserver.jar
[echo] v5.10<02> 23November2004

BUILD SUCCESSFUL
Total time: 25 seconds

```

## Enabling Debug Information

There are two distinct types of “Debug Mode” for the Insight server components:

### Console Debug Mode:

Adjusting the Console Debug Mode will increase / decrease the amount of information printed to the application’s console. In the case of applications running as services, the debug content will not be logged.

### To change the debug level

- 1) Open the appropriate configuration file for any Insight server component in a text editor (for more information see the tables starting on page 204).
- 2) Locate the “DebugLevel” parameter.
- 3) Change the “DebugLevel” parameter to either increase or decrease the debug messages:

**Table 16: Debug Levels for the Insight Server Components**

Off	0
Low	1
Medium	2

High	3
------	---

- 4) Close the configuration file.
- 5) Restart the Insight server component.

## Database Debug Mode

Database Debug Mode determines whether database queries are logged to a file.

To enable or disable the database debug information:

- 1) Open the appropriate configuration file for any Insight server component in a text editor (for more information see the tables starting on page 204).
- 2) Locate the "DatabaseDebugMode" parameter.
- 3) Change the "DatabaseDebugMode" parameter to either on or off, to display or suppress debug messages:

**Table 17: Database Debug Mode settings**

Off	0
On	1

- 4) Close the configuration file.
- 5) Restart the Insight server component.
- 6) All database queries should be logged to the JDBCConnector.txt file in the **logs** directory of the server component.

**NOTE:** Changing the debug level can drastically decrease Insight's run speed. Be sure to reset all debug levels to 0 once you have fixed the problem.

## Starting the User Manager in Console Mode

- 1) Locate the User Manager's installation directory.
- 2) Run the "InsightUserManager."

**If you are on Windows:** Run InsightUserManager.cmd (a new DOS Console should appear and display debug information as the User Manager starts).

**NOTE:** In GUI environments, do not close the console window unless you want to close the Collection or Personal Insight Manager.

**If you are on Solaris or Linux:** Run InsightUserManager.sh (a new Console should appear and display debug information as the User Manager starts).

- 3) Look for successful startup. If the User Manager started up successfully, you should see the following message print on the console:

```
IUS: Accepting connection.
```

- 4) Troubleshooting unsuccessful startup.

If you do not see "Accepting connection," you may see one of the following:

```
IUS: IOException on listener open.  
IUS: Server port cannot be opened. Terminating.
```

This often means that an application is already running on port 2840 (User Manager's default port). This is most likely because the User Manager itself is already running.

Check to see if User Manager is running as a service. If it is, stop the service, and resume testing in console mode. At the conclusion of the test, after everything is repaired, remember to restart the User Manager service.

```
IUS: Database is not configured correctly
```

This means that the User Manager could not connect to the database. For more information, see "Debugging a Database Connection for the User, Collection, or Personal Insight Managers" on page 272.

## Starting the Collection Manager or Personal Insight Manager in Console Mode

- 1) Locate the Collection or Personal Insight Manager's installation directory.
- 2) Run the "InsightCollectionManager" executable.

**If you are on Windows:** Run `InsightCollectionManager.cmd` (a new DOS Console should appear and display debug information as the Collection or Personal Insight Manager starts).

**NOTE:** In GUI environments, do not close the console window unless you want to close the Collection or Personal Insight Manager.

**If you are on Solaris or Linux:** Run `InsightCollectionManager.sh` (a new Console should appear and display debug information as the Collection or Personal Insight Manager starts).

- 3) Look for successful startup. If the Collection or Personal Insight Manager starts up successfully, you should see the following message print on the console:

```
XYZ: Accepting connection.
```

- 4) Troubleshooting unsuccessful startup.

If you do not see "Accepting connection," you may see one of the following:

```
XYZ: IOException on listener open.  
XYZ: Server port cannot be opened. Terminating.
```

This often means that an application is already running on port 3070 (Collection or Personal Insight Manager's default port). This is most likely because the Collection or Personal Insight Manager itself is already running.

Check to see if Collection or Personal Insight Manager is running as a service. If it is, stop the service, and resume testing in console mode. At the conclusion of the test, after everything is repaired, remember to restart the Collection or Personal Insight Manager service.

```
XYZ: Database is not configured correctly
```

This means that the Collection or Personal Insight Manager could not connect to the database. For more information, see "Debugging a Database Connection for the User, Collection, or Personal Insight Managers" on page 272.

## Debugging a Database Connection for the User, Collection, or Personal Insight Managers

Insight relies on a backend database to store user and collection information. Without a connection to the database, the components will not run properly. All of the Insight server components (User, Collection and Personal Insight Manager) may be tested the same way.

When running one of the Insight server components in console mode, toward the bottom of the scroll, we want to see:

```
XYZ: Accepting connection.
```

(where "XYZ" is the short-name you defined for your collection, or "IUS" for the User Manager)

If you instead encounter:

IUS: Database is not configured correctly

there may be problems with the database itself or with the Insight connection to it. Starting with the database, check the following:

**Common Things to Check when testing a Database Configuration Error:**

- Is the database server running?
- Are other applications that are dependent on the database running properly?
- Can you connect to the database using the database's Administrator Tools:
  - For Microsoft SQL Server – Enterprise Manager
  - For Oracle – Enterprise Console

**If the Database Server is Running:**

If you can connect to the database using other applications, then the next step is to confirm the database configuration settings for the server components you are testing.

**NOTE:** It is best to test the Insight server components in console mode, as it's easier to see debug messages in the console.

- 1) Locate the configuration file for the Insight server component you are testing.

In the Insight server component installation directory, look for the appropriate configuration file. It will be one of the following:

- a) InsightUserServer.dat – for User Manager
- b) InsightServer.dat – for Collection Manager or Personal Insight Manager

- 2) Open the Configuration File in a text editor.

- 3) There are three common configuration settings that are most likely to produce errors: the Database Connection String, Database Username, and Password.

- 4) Check the Database Connection String:

- a) For the User Manager:

UserDatabaseConnect =

- b) For the Collection Manager or Personal Insight Manager:

DatabaseConnect =

Check the Database Hostname, Port, and database name to ensure they are correct.

**MS SQL Manager Example:**

Depending on the version of Insight you installed with, you may have a different driver for Microsoft SQL Server.

### Which Driver am I using?

To determine the SQL Driver you are using:

- a. find the line "**JDBCDriverName**" in the configuration file.
- b. Match it with the column in the Table on page 309.

#### 5) Check the Database username and password:

Common errors are to use the Insight administrator username / password or an Insight end user username / password. The database username / password are needed here.

#### For MS SQL Server:

Database Username and Password are part of the DatabaseConnect string (see #4 above).

#### For Oracle, MySQL,:

Locate the following lines and check the values.

```
DefaultUsername = yourusername  
DefaultPassword = yourpassword
```

#### 6) Turn on database debugging.

Find the following line:

```
DatabaseDebugMode =
```

If it is not already "on" (1), change the value:

```
DatabaseDebugMode = 1
```

#### 7) Save your changes.

Save any changes you made to the "InsightUserServer.dat" or "InsightServer.dat".

#### 8) Restart the Insight server component to begin logging.

**NOTE:** The configuration files are only read by the Insight server components at startup. Changes in the dat file will not be reflected until the next time the Manager is started.

#### 9) Open the "JDBCConnector.txt" log file located in the logs directory of the component's installation directory.

#### 10) Look for successful startup:

Logs will vary, depending on the database engine in use, but will generally follow a pattern as follows:

```
HH:MM:SS driver: [message level] message text.
```

An example of a successful return may be:

```
JC 13:59:14 jdbc: [L] Statement created.
JC 13:59:14 jdbc: [L] Results generated.
JC 13:59:14 jdbc: [L] Returning from runQuery.
```

#### 11) Troubleshooting unsuccessful startup:

Look for words like “Exception” / “Error” (etc.) in the log.

In the following MS SQL Server example, JoeUser is NOT a valid database username:

```
JC 16:36:39 jdbc: [H] SQL Exception while connecting:
    java.sql.SQLException: []Login failed for user 'JoeUser'.
JC 16:36:39 jdbc: [H] No valid connection available, aborting
    query.
JC 16:36:39 jdbc: [L] Returning from runQuery.
```

## Testing the Network Connection

If you are having trouble connecting to any Insight server component, you may have a network problem.

### Setting up a testing environment

It is best to run this test while the server component is running in console mode, as it is possible to see when a client application connects to the server component. Check that when the server component starts up, it prints “**Accepting Connection**” on the console. If it doesn’t, the problem is likely not in the network (try the database).

### Testing a local connection from the server

If you can see “**Accepting Connection**,” then see if you can log in with Insight Studio. If you can not login, check for a working network connection (try a web browser). If the browser works, and you can browse the web, then you definitely have a network connection.

Insight commonly runs on a series of ports:

**Table 18: Default Ports for Insight Server Components**

Insight Server Component	Port
User Manager	2840
Collection Manager	3070 – 4040
Default Collection Manager Port	3070
Default Personal Insight Manager Port	3080

**NOTE:** 3070 is the default Collection Manager port, but with multiple Collection Managers or Personal Insight Managers you will need to increment the “PortNumber” in InsightServer.dat (in the Manager installation directory) so each Manager uses a unique port on the server.



If you run a firewall, be sure that ports assigned to Managers are open to bi-directional traffic. Failure to do so will interfere with communication to the Managers.

## Testing the Network Connection

If you have a good network connection and the ports are available, then check the Hostname / IP address for the User Manager, and the collection list to ensure that the hostnames are valid. If you’re still having problems and you can log in from the server then contact your network administrator.

## Enabling Debug Information for BrowserInsight

To enable BrowserInsight’s Debug Information:

- 1) Open up the browserInsight.conf configuration file.
- 2) Locate the Logging section, change the following line:  
**Log.Console.On=no** to **Log.Console.On=yes**.
- 3) Also, confirm that the **Log.console.loglevel** is set to 10.
- 4) Save the BrowserInsight.conf configuration file.
- 5) To simplify debugging, restart Tomcat in console mode (if you are running Tomcat as a service, stop the service and run “start\_tomcat.bat” or “start\_tomcat.sh”).

As Tomcat starts, it will process each of Insight’s servlet component’s configuration files. When it reaches BrowserInsight, it will connect to each of your Collection Managers and Personal Insight Managers and print out a list of collections that it can connect to. An example follows:

```
BI 12:34:04 Hlpr: getTrinityList: dbProfile:
BrowserInsightDBProfile: Name = oracle, JDBCDriver =
oracle.jdbc.driver.OracleDriver, JDBCUrlPrefix = jdbc:oracle:thin:, useLowerCaseCommand = true,
useDistinctKeyword = false.
BI 12:34:06 infr: adding 11: 3::LUNA::NA
BI 12:34:06 infr: adding 12: 9::LUNA::NA
BI 12:34:06 infr: adding 13: 8::LUNA::NA
BI 12:34:06 infr: adding 14: 2::LUNA::NA
BI 12:34:06 infr: adding 15: 6::LUNA::NA
```



```
BI 12:34:06 infr: adding 16: 7::LUNA::NA  
BI 12:34:06 infr: adding 17: 1::LUNA::NA  
BI 12:34:06 infr: adding 18: 4::LUNA::NA  
BI 12:34:06 infr: adding 19: 5::LUNA::NA
```

Once it has completed, log in to BrowserInsight. As you log in, BrowserInsight will connect to each collection and verify that the browser's settings are configured properly. If there is an error, a message will be sent to the console.

```
BI 12:38:59 Hlpr: constructTrinityProxy: dbProfile:  
BrowserInsightDBProfile: Name = oracle, JDBCDriver =  
oracle.jdbc.driver.OracleDriver, JDBCUrlPrefix = jdbc:oracle:thin:,  
useLowerCaseCommand = true, useDistinctKeyword = false.  
BI 12:38:59 Hlpr: no media security on collection 15  
BI 12:38:59 hPLg: No left background is specified for the collection.  
This is potentially a misconfiguration.  
BI 12:38:59 hPLg: Trimming Admin Media Processing Collection
```

In the example above, the collection is missing a piece of the Background Image. Other common issues might be an undefined **BrowserInsightDBProfile**, or a mismatched collection name.

If you need to see the SQL queries, turn database debug on:

- 1) Open the BrowserInsight.conf Configuration File.
- 2) Locate the DatabaseDebugMode Parameter.
- 3) Change DatabaseDebugMode from 0 to 1.

```
DatabaseDebugMode=1
```

- 4) Save the BrowserInsight.conf configuration File.
- 5) Restart BrowserInsight.
- 6) Database queries will be logged to databaseconnector.txt in the logs directory of BrowserInsight's Installation Directory.

# Performance Tuning for the Insight/ Inscribe Server Components

---

The largest performance gain that can be made for Insight server components is to turn all debug settings to 0. Review “Enabling Debug for the Insight Server Components,” but instead of increasing logging values, turn them off.

**NOTE:** Disabling debug logs does not disable the search query, access, and export logs (used for reporting on system usage). These logs are configured with their own parameters.

## Inscribe Performance Enhancements

---

Inscribes performance is tied to several conditions. They are as follows

- Complexity of the Catalog Template
- Database Performance
- When Keyword indexing occurs

To configure your system to optimize performance for your workflow, you need to be aware of how the Insight system works.

The fastest systems have a simple Catalog Template. This is similar to a single Spread sheet in Excel. There are no repeating fields and no authorities to maintain. As the structure becomes complex more work is required to save a record.

Most searches are preformed using Keywords. Keyword searching requires the system to parse all values in the records. So if you add or remove a word, the relationship to that word needs to be modified.

So, why tell you this? During our investigations into performance enhancement in Inscribe, we addressed a number of areas where performance improvements could be made. One of the most significant areas we identified was through Keyword (Term) Indexing.

In all previous versions of the software, when you made a save in Inscribe, you had to wait until the process of adding the record to the database was complete. Once complete you were allowed to proceed. Save times included adding values, creating relationships between records and authorities and Keyword Indexing.

In order to enhance this, we separated the process of Keyword indexing from the process of entering the values into the database. This separation has allowed us to give you several options to improve save performance depending on your workflow.

Several advanced configuration options are available that may significantly influence the performance of Inscribe save times for the cataloger. Regardless of your choice, all keyword indexing must take place at some point.

Making a few adjustments in your InsightServer.dat file will determine when the Keyword indexing is preformed.

Here are your options:

- Automatic keyword indexing (as before). When cataloging in Inscribe, commit all changes before control is returned to the client.
  - MedeAutoTermIndexingMode = 1
- Turn off automatic keyword indexing. This requires manually Keyword (Term) Indexing from the Insight Administrator Tools or command line Indexer.
  - MedeAutoTermIndexingMode = 0
- Run automatic Keyword (Term) Indexing in the Background on a schedule.
  - MedeAutoTermIndexingMode = 2
  - MedeBackgroundTermIndexingMinutes = 1440
    - 1440 minutes is every 24 hours
  - MedeBackgroundTermIndexingFirstTime = 0230
    - 0230 is 2:30AM
- Run automatic Keyword(Term ) Indexing immediately after Inscribe save completion.
  - MedeAutoTermIndexingMode = 2
    - Note: MedeBackgroundTermIndexingFirstTime and MedeBackgroundTermIndexingMinutes are commented out.

# Repackaging & Advanced Configuration of the Insight Client Applications

---

The Insight client applications (Insight Client, Inscribe, and Insight Studio) can be configured to enable support for special environments and settings. Configuration options include automatic login definition, support for lab or restricted environments, how multimedia is played, support for proxy servers, and changing the default User Manager.

## Packaging and Distributing the Insight Client Applications

---

Luna provides a simple and easy way to repackage the Insight Client Applications, allowing system administrators to distribute Insight with the settings most appropriate to their environment. The Insight Client Applications (Insight, Inscribe, and Insight Studio) can be customized to work with your User Manager and your environment. Platform-specific installers for the clients can be found on the “Clients” CD as follows:

**Table 19: Locations of the Client Installers**

Directory (based on client product name)	Subdirectory (based on platform)	Installer (or component)
insight_client	Deploydirector*	insight_50.dar
	MacOSX	installInsight.zip
	Windows	installInsight.exe

Inscribe	MacOSX	installInscribe.zip
	Windows	installInscribe.exe
insightStudio	Linux	installStudio.bin
	MacOSX	installStudio.zip
	Solaris	installStudio.bin
	Windows	installStudio.exe
<ul style="list-style-type: none"> <li>For more on distributing with Deploy Director, please see the "Installing and Configuring Deploy Director" Document on the Deploy Director CD.</li> </ul>		
<ul style="list-style-type: none"> <li>DEPLOY DIRECTOR IS NO LONGER SUPPORTED BEYOND 5.6</li> </ul>		

## Packaging the Insight Client Applications

For more information on customizing the Insight Application Clients configuration file, please see the other chapters within this document. Once you have the configuration you want to distribute, it's time to repackage the clients.

**NOTE:** The following example describes how to package the Insight Java Client, but will work with any of the other Insight application clients. Simply replace the name of the installer and configuration file with the name of the Insight Client Application and configuration file you would like to distribute.

### For Windows systems

To distribute a preconfigured Insight Java client to your end users, you need to repackage ***installInsight.exe*** with your customized configuration file ***insight.dat*** (for information on customizing Insight, see **Insight Client Application Configuration Files** on page 283). The installation files for the Windows version of the Insight Java Client are located on the Insight 6.2 Clients CD under the directory: ***insight\_client\Windows***. To build an installation package for Windows end-users:

- 1) If you do not already have the WinZip archive utility and WinZip Self-Extractor, download and install them. (It is recommended that you order the software instead of merely downloading trial copies. Though trial copies generate the package correctly, they produce a message indicating that unlicensed copies were used when end users unzip and install the package.)
  - For the trial copy of WinZip Archive Utility:  
<http://www.winzip.com/downau81.cgi?winzip81.exe>
  - For the trial copy of WinZip Self-Extractor:  
<http://www.winzip.com/downauto.cgi?wzipse22.exe>
- 2) Start WinZip Self Extractor, select "**Self-extracting zip file for Software Installation,**" and press **Next**.
- 3) At the next panel, leave "**Span multiple removable disks**" unchecked, and press **Next**.
- 4) Press "**Run WinZip**".

- 5) After passing the first two panels of WinZip by pressing **Next**, select **"Create a new Zip file"**.
  - 6) Follow the instructions and create a Zip file (for example, *insight50\_and\_dat.zip*) containing **installInsight.exe** from the **insight\_client\Windows** directory on the Insight 6.2 Clients CD, and your customized **insight.dat** configuration file.
- NOTE: Don't try and open the InstallInsight executable as a zip file and add the DAT file to it, this will corrupt the installer.**
- 7) After the Zip file is created, close the WinZip panel.
  - 8) Return to WinZip Self Extractor (or you can restart it, and select **"Self-extracting file for software installation"**), select the Zip file you just created (for example, *insight\_and\_dat.zip*), and press **Next**.
  - 9) In the next panel, enter the message you would like your end user to see when the files are self-extracted, and press **Next**.
  - 10) Leave **"Unzip automatically"** unchecked, select English as the preferred language, and press **Next**.
- Important:** Enter **.\installInsight.exe** under **"Command to issue when unzip operation completes."** Leave **"Wait for"** blank, and press **Next**.
- 11) Enter your message (which will be displayed when the package is unzipped and installed), and press **Next**.
  - 12) Enter the information to be displayed in the **"About"** box (if desired), and press **Next**.
  - 13) In the next panel, select your own icon (if desired), and press **Next**.
  - 14) In the last panel, review all of your selections and all messages you have prepared. After verifying them, press **Finish**, to create the self-extracting executable file.
  - 15) Test the self-extracting package to verify that it works correctly.
  - 16) Place the self-extracting package in a location accessible to your end-users.

End-users will download the self extracting package, launch it, and follow the instructions to install the Insight Java Client. For users who have previous releases of the Insight Java Client installed, installing the new release of the Insight Java Client in the same location will cause their old **Insight.dat** file to be overwritten by the new one packaged with *installInsight.exe*.

## For MacOSX systems (10.2+)

**NOTE:** The procedure described below must be performed on a Mac OSX machine. Other Mac OS versions will produce corrupted installers.

**To repack the MacOSX Insight Client installer for with a customized configuration file:**

1. Locate **installInsight.zip** in the **\insight\_client\macOSX** directory on the Insight 6.2 Clients CD. Unzip it to a temporary working directory on the Mac OSX machine.
2. Copy the customized **insight.dat** configuration file to the same working directory.
3. Make a new zip file (or other compressed package that can be processed and accepted under Mac OSX) containing both InstallInsight installer and **insight.dat**

## Insight Client Application Configuration Files

Each of the Insight Client Applications uses a unique configuration file to store basic information. This configuration file includes information on the User Manager the client should use for authentication as well as other client based configurations.

**Table 20: Client Configuration Files**

Client Name	Configuration File
Insight	insight.dat
Inscribe	inscribe.dat
Insight Studio	insightStudio.dat

Each of these configuration files can be opened using a text editor of your choice.

**NOTE:** Double-clicking on these files in some Macintosh systems will not open these files with TextEdit or another text editor, if you have problems opening this file, (1) open TextEdit and then (2) open the file using TextEdit's Open option from the file menu.

**Table 21: Default Client Installation Locations**

Client Name	Platform	Installation Location
Insight	Windows	C:\program files\LunaImaging\Insight 5.x
	OS X	/Applications/LunaImaging/Insight 5.x
Insight (with DeployDirector)	Windows	C:\program files\LunaImaging\Insight
	OS X	/Applications/.LunaImaging/Insight /Applications/LunaImaging/Insight *
Inscribe	Windows	C:\program files\LunaImaging\Inscribe 5.x
	OS X	/Applications/LunaImaging/Inscribe 5.x
Insight Studio	Windows	C:\program files\LunaImaging\5.x\Studio
	OS X	/Applications/LunaImaging/5.x/Studio
* <b>Deploy Director will place configuration files such as the <i>Insight.dat</i> in a <i>.LunaImaging</i> Folder on OS X</b>		

## Use-based configurations

Below are a set of use cases and adjustments to the Insight Configuration Files.

### Changing the Default User Manager Address or adding additional User Managers

As each Institution will want to configure the Insight Client Applications to use their own User Manager (and potentially a list of others as well), Luna has provided a method to configure the clients so the user can choose from one or a set of User Managers.

Each of the Insight Client Applications can be configured to provide the user with a list of one or a set of User Manager Addresses on login.

**NOTE:** When you run the installer for the Insight server components, a set of configuration files is automatically created and pre-configured with your connection information for your User Manager.

To customize your User Manager address in any of the Insight Client Application configuration files, follow these steps:

- 1) Locate a copy of the configuration file: copies of the Insight Client Application configuration files are located in the client\_config\_files directory located in the Installation directory of the Insight server components.
- 2) Open the configuration file you would like to customize in a text editor. A sample Insight.dat configuration file is displayed below:

```
# Insight.dat
# Insight configuration file
#
# Lines starting with # signs are comments.
#
# UserServerAddress1 - the address of the user server.
#
# This address provides access to all collections
UserServerAddress1 = InsightUser.lunaimaging.com

#DefaultUserName = user
#DefaultUserPassword = user
```

- 3) To change the User Manager Address, locate the following line:

```
UserServerAddress1 =
```

- 4) Set the value of UserServerAddress1 to the hostname of your User Manager. If you would like to specify more than one User Manager, then increment the number after UserServerAddress by one for each User Manager you would like to add. For example:

```
UserServerAddress1 = http://www.myusermanager.mycollege.edu/
UserServerAddress2 = insightuser.lunaimaging.com
```



**NOTE:** Any line beginning with # is a comment, and is ignored by the system. Comments exist only to assist you in preparing the file. They provide explanations and present alternatives. Be sure that the *UserServerAddress1* line is turned on (does not have a leading #).

- 5) Save the file.
- 6) Test your changes:
  - a) Copy your new configuration file into the installation directory for a version of the client.
  - b) Launch the client application and try to log in.

### Configuring the Insight Client to Automatically Login

The purpose of automatically logging on to Insight is to allow users access to an Insight collection without needing to know a username or password. Automatic log-on enables the user(s) to select a collection by bypassing the log-on screen.

**NOTE:** This means that anyone who has access to a system that has automatic log-on initiated is granted access to a collection, regardless if they know the appropriate username/password or not.

**NOTE:** Due to the security risks, this feature is only available to the Java Client, and is not available to Insight Studio or Inscribe.

You must install a functioning version of Insight Java Client in order to set the automatic log-on. To set automatic log-on for your Insight collection, follow these instructions:

- 1) Locate the file named *Insight.dat*. This file is located where you installed Insight.
- 2) Open the *Insight.dat* file using Notepad or any other text editor of your choice.
- 3) Before you make any changes, you may want to create a copy or backup of your *Insight.dat* file for future reference.
- 4) Locate the following lines:

```
#DefaultUserName =  
#DefaultPassword =
```

- 5) Remove the # signs from the front of the *DefaultUserName* and *DefaultUserPassword*. Be sure you do not remove any other # signs other than the ones instructed.
- 6) Once you have removed the # signs from the *DefaultUserName* and *DefaultUserPassword*, set the values to match the username and password you would like to use for automatically login.

```
DefaultUserName = my_username  
DefaultPassword = my_password
```

- 7) Save the changes you made to the *Insight.dat* file.

Now, you should be able to automatically log on to your Insight collection when it is launched. If you would like to disable automatic log-on, simply restore the # signs in front of DefaultUserName and DefaultUserPassword.

**NOTE:** If for some reason Insight cannot login using the default username and password, the login screen will be presented to the user.

### Support for a Lab Environment (Locked-Down Machines)

Besides the client applications themselves, the clients use a set of files at runtime. These include temporary caches, user preferences, and re-useable information such as localization files.

#### Temporary Files

The Insight clients maintain a cache of the images requested by the clients to optimize requests for the same image more than once – quite similar to the image and field caches for web-browsers. These caches are encrypted and are maintained at run-time and then discarded when the application is shut down. Insight Studio and Inscribe also use temporary space for creating the derivatives and wavelet files before they are uploaded to the server.

By default, the Clients use the OS's temporary directory for storing these files. Though these locations can be customized, common locations are as follows:

**Table 22: Common Temporary Locations Per Platform**

Platform	Location
Windows 2000 / XP	C:\documents and settings\username\Local Settings\Temp
OS X	/tmp/
<b>NOTE:</b> These locations can be easily overridden. Please check with your system administrator for the default location on your system.	

#### Forcing Insight to use a Specific Location for Temporary Files

If you would like to force the Insight Client Applications to use a specific location for temporary files, you can set a property in any of the configuration files:

Property	Value
TmpDir	The location where temporary files should be placed on your machine

Once you have made this change, restart the client application to test the configuration (for more detailed steps on editing the configuration file, follow the steps above for changing the UserManagerAddress).

#### User Preferences & Reusable Information

User Preferences and other Reusable Information such as locale "language" files and collection backgrounds are stored by default in the User's home directory (within a LunaImaging Directory).

**Table 23: Operation System User Preference Directory**

Platform	Location
Windows 2000 / XP	C:\documents and settings\username
OS X	/Users/username
<b>NOTE:</b> These locations can be easily overridden, please check with your system administrator for the default location on your system	

### ***Forcing Insight to use a Specific Location for Reusable Files***

If you would like to force the Insight Client Applications to use a specific location for reusable files, you can set a property in any of the configuration files:

Property	Value
HomeDir	The location where reusable files should be placed on your machine

Once you have made this change, restart the client to test the configuration (for more detailed steps on editing the configuration file, follow the steps above for changing the UserManagerAddress).

### **Playing Multimedia within the Image Workspace Instead of an External Player**

If you would like to play Audio, Video, and QTVR media in the image workspace instead of in an external player, you can set a property within the Insight Java Client and Inscribe's configuration files.

**NOTE:** Playing multimedia within the Image Workspace REQUIRES Apple's QuickTime and QuickTime for Java to be installed.

**NOTE:** For more information on configuring QuickTime or QuickTime for Java, please see <http://www.lunaimaging.com/support/getquicktimeforjava.html>.

Property	Value
UseExternalMultiMediaViewer	0 – play media in the Image Workspace 1 – play media in an external QuickTime Player
<b>NOTE:</b> The default is to play media in the External Player.	

### **Support Firewalls and Advanced Networking Environments**

The Insight Client Applications utilize a series of ports for communicating with the User, Collection, Personal Insight, and Media Managers. Depending on your networking environment, you may have to configure your firewall or proxy server to allow bi-directional connections for all of the ports that your Insight server components run on.

Insight Component	Port
User Manager	2840
Collection Manager or Personal Insight	3070-4080
Media Manager / BrowserInsight	80, 8080, 8081
<b>NOTE:</b> Depending on your configuration, not all of these ports may be in use. Please check with your Insight administrator (or check the server component configuration files for a more specific list of ports).	

### **Using Insight with a Proxy Server**

Because the Insight Applications use a series of ports for accessing the server components and media files, a proxy server configuration will most likely have two components: an HTTP based proxy for media and a SOCKS based proxy for the Insight server components.

#### **HTTP based Proxy for Media Content**

The Insight Client applications support the use of an HTTP based proxy to connect to the Media Manager or a web server serving Insight's content.

To configure the Insight Client applications to use your HTTP Proxy Server, open the Insight Configuration file and add the following properties:

Property Name	Value
http.proxyHost	The hostname of the HTTP Proxy Server
http.proxyPort	The port address of the HTTP Proxy Server (note both the port and hostname need to be set for this to work)
http.nonProxyHosts	A list of hosts separated by " " (vertical bar) that should not be used for HTTP Proxy connections for example (myserver1.com myserver2.org)
<b>NOTE:</b> You only have to configure those clients outside the proxy server that access Insight Servers inside the proxy server .	

Once you have made this change, restart the client to test the configuration (for more detailed steps on editing the configuration file, follow the steps above for changing the UserManagerAddress).

#### **SOCKS based Proxy for Non-HTTP Based Ports (User & Collection Managers)**

For non-HTTP based communications such as the client's communication with the collection or User Managers, you will either need to open the ports on your firewall or set up a SOCKS based proxy server.

To configure the Insight Client applications to use your SOCKS Proxy Server, open the Insight Configuration file and add the following properties:

Property Name	Value
socksProxyHost	The hostname of the SOCKS Proxy Server
socksProxyPort	The port address of the SOCKS Proxy Server (note both the port and hostname need to be set for this to work)
<b>NOTE:</b> <i>You only have to configure those clients outside the proxy server that access Insight Servers inside the proxy server.</i>	

Once you have made this change, restart the client to test the configuration. (for more detailed steps on editing the configuration file, follow the steps above for changing the UserManagerAddress)

**NOTE:** If you are configuring both a SOCKS Proxy and HTTP Proxy, it's important to understand the tunneling order. The clients are configured to use the SOCKS proxy server as the default connection method and connect to the HTTP proxy through the SOCKS proxy, i.e.:

CLIENT -> SOCKS PROXY -> HTTP PROXY -> Insight Media Manager

## Wireless Compatibility Mode

Luna has documented specific issues where the Insight Client Applications' experience may degrade when run under explicit wireless conditions. This is currently known to occur using **Intel's CENTRINO** wireless chipset, though check with Luna for an up-to-date list of affected chips. For computers using this wireless chipset to use Insight, it may be necessary to configure the client to run in "**Wireless Compatibility Mode**". To do this, simply enable this parameter with a value of 1.

Property Name	Value
WirelessCompatabilityMode	0 – OFF 1 – ON

## Specifying a Collection Data Directory

The Collection Data Directory is used by Insight and Personal Insight for processing derivative files, storing thumbnail images (for display in the linking tool), and other collection data.

**NOTE:** The collection data directory can grow quite large as you build more collections.

Property Name	Value
CollectionDataDirectory	The physical path to the directory where media processing should be performed and files should be stored.

## Common Properties for the Insight Client Applications

**Table 24: Consolidated Properties by Client Application**

Property	Insight	Inscribe	Insight Studio
Filename	insight.dat	inscribe.dat	insightStudio.dat
UserManagerAddress1	YES	YES	YES
UserManagerAddress2			
...			
DefaultUserName	YES	NO	NO
DefaultPassword	YES	NO	NO
TmpDir	YES	YES	YES
HomeDir	YES	YES	YES
http.proxyHost	YES	YES	YES
http.proxyPort	YES	YES	YES
http.nonProxyHosts	YES	YES	YES
socksProxyHost	YES	YES	YES
socksProxyPort	YES	YES	YES
UseExternalMultiMediaViewer	YES	YES	NO
CollectionDataDirectory	YES	NO	YES
WirelessCompatabilityMode	YES	YES	YES

# Configuring Insight's Advanced Authentication and Authorization Features

---

The Insight User Manager currently supports three Security Models. By default, Insight is configured with the standard security model which simply uses the usernames and passwords in the User Manager. With Insight 4.1, Luna has modularized the methods that Insight uses to manage Authentication and Authorization. Luna has also released two new security modules for those institutions that are interested in configuring Insight to work with an existing security provider.

## Pure LDAP

---

The first security module out-sources the process of Authentication to an LDAP Server. To use this module, you must first have an LDAP Directory Server that supports LDAP v3. The following are LDAP Servers that Luna has tested against:

- Windows 2000's Active Directory server
- OpenLDAP
- SunONE Directory Server v5.2

**NOTE:** Insight optionally supports SSL connections for LDAP Queries.

## Kerberos & LDAP or (Windows® Active Directory)

---

The second security module out-sources Authentication to a Kerberos 5 Server and Authorization to an LDAP Server. To use this module, you must have a working

Kerberos 5 implementation and an LDAP Server that supports GSS-API SASL. The following implementations have been tested:

- Windows 2000's Active Directory Server (provides both Kerberos & LDAP)
- MIT Kerberos 5 KDC with one of the following:
  - OpenLDAP
  - SunONE Directory Server v5.2

**NOTE:** Insight optionally supports SSL connections for LDAP Queries.

## Enabling Simple LDAP Authentication for the Insight User Manager

**NOTE:** Changing Insight's Security model can have major repercussions. Please consult with your network and security administrators before implementing any changes regarding your local security environment.

**NOTE:** Please read and complete the Insight Security Worksheet at the end of this chapter before going any further.

**NOTE:** Finally, please test all configurations on a test server before implementing in a production environment.

- 1) In a text editor, open the InsightUserServer.dat file located in the "<insight\_install>\user\_manager" directory.
- 2) Change the Insight Authentication Handler to use LDAP:

- a. Locate the following lines:

```
##
# AuthenticationHandler - the full class name of the
# authentication handler to use for authentication.

AuthenticationHandler =
com.luna.insight.client.security.DefaultAuthenticationHandler
```

- b. Change the AuthenticationHandler property to:  
com.luna.insight.client.security.SimpleLDAPAuthenticationHandler. This will tell the User Manager to use LDAP when authenticating users.

- 3) Change the Authorization Handler to use LDAP:

- a. Locate the following lines:

```
##
# AuthorizationHandler - the full class name of the
# authorization handler to use for authorization.

AuthorizationHandler =
com.luna.insight.client.security.DefaultAuthorizationHandler
```



- b. Change the AuthorizationHandler property to:  
com.luna.insight.client.security.SimpleLDAPAuthorizationHandler. This will tell the User Manager to use LDAP when authorizing users.

4) Define the URL for the LDAP v3 Server:

- a. Locate the following lines:

```
##  
# LdapURL - The URL of the LDAP server.  
# (note: under Windows 2000/Active Directory, this is the  
# address # of the Active Directory machine pre-pended with  
# ldap:// )  
  
#LdapURL = ldap://ldap.lunaimaging.com
```

- b. Uncomment the LdapURL property and change it to match the URL for your LDAP Server. When done, it should look like this:

```
##  
# LdapURL - The URL of the LDAP server.  
# (note: under Windows 2000/Active Directory, this is the  
# address # of the Active Directory machine pre-pended with  
# ldap:// )  
  
LdapURL = ldap://your.ldap.server.edu
```

5) Define whether insight should use SSL to communicate with the LDAP Server:

- a. Locate the following lines:

```
# LoginSSL - A value of 1, yes, or true, will cause LDAP  
# communication to use SSL. The LDAP server must be  
# configured to use SSL. Any other value (with 0 being the  
# correct one), or not specified, and LDAP communication  
# will not be secured.  
  
# LoginSSL = 0
```

- b. Uncomment and change the LoginSSL property to 1. When done, it should look like this:

```
# LoginSSL - A value of 1, yes, or true, will cause LDAP  
# communication to use SSL. The LDAP server must be  
# configured to use SSL. Any other value (with 0 being the  
# correct one), or not specified, and LDAP communication  
# will not be secured.  
  
LoginSSL = 1
```

6) Define the LDAP User Path – this is the directory path in the LDAP Server identifying where to find valid users.

- a. Locate the following lines:

```
##
# LdapUserPath: Directory path in the LDAP server
# identifying object containing authenticatable users.

LdapUserPath = ou=people,dc=lunaimaging,dc=com
```

- b. Uncomment the `LdapUserPath` property and set it to the path in the LDAP database that Insight should use to find valid users. When complete, it should look like this:

```
##
# LdapUserPath: Directory path in the LDAP server
# identifying object containing authenticatable users.

LdapUserPath = ou=people,dc=lunaimaging,dc=com
```

**NOTE:** Search more the one “ou” in LDAP (new in 6.2).

```
OPTIONAL SIMPLE LDAP CONFIGURATION:  SEARCHING MULTIPLE BRANCHES IN
THE DIRECTORY

LdapUserPathN and LdapUserAttributeN:  To grant Insight access to
users distributed through

more than one branch in a directory server, define additional
LdapUserPath properties.

Each additional LdapUserPath property must end with a unique integer
greater than or equal to 2.

In most configurations, the attribute used to identify user login
names will be the same

in all branches of the directory server.  If this is not the case,
you may define additional

LdapUserAttribute properties, using the same numeric suffix
technique.

When a user logs in, Insight will search the directory server using
search paths in numeric order.

Example 1 -- Search two paths, using the same user attribute:

LdapUserPath      = ou=professors,dc=myschool,dc=edu
LdapUserPath2     = ou=catalogers,dc=myschool,dc=edu
LdapUserAttribute = uid

Example 2 -- Search two paths, using a different user attribute for
each:

LdapUserPath      = ou=professors,dc=myschool,dc=edu
```

```
LdapUserAttribute = uid  
  
LdapUserPath2 = ou=catalogers,dc=myschool,dc=edu  
  
LdapUserAttribute2 = login
```

- 7) Define the LDAP User Attribute – this is the field that usernames are authenticated against.

- a. Locate the following Lines:

```
##  
# LdapUserAttribute - LDAP Attribute to match usernames  
# against.  
  
# Examples:  
# LdapUserAttribute = cn // Active Directory  
# LdapUserAttribute = uid // LDAP using EduPerson schema  
  
#LdapUserAttribute = uid
```

- b. Uncomment the LdapUserAttribute and set it to the field in your LDAP Database that contains usernames. When complete, it should look like this:

```
##  
# LdapUserAttribute - LDAP Attribute to match usernames  
# against.  
  
# Examples:  
# LdapUserAttribute = cn // Active Directory  
# LdapUserAttribute = uid // LDAP using EduPerson schema  
  
LdapUserAttribute = uid
```

## Associating LDAP Users with Insight Users

Each User in the Insight User Manager will be matched with an LDAP user by comparing the username properties. Usernames must be unique for this authentication model to work properly. Please also ensure that passwords are populated although these passwords are not used for authentication. The passwords will be validated through the LDAP Query.

## Using LDAP SSL Certificates with Insight

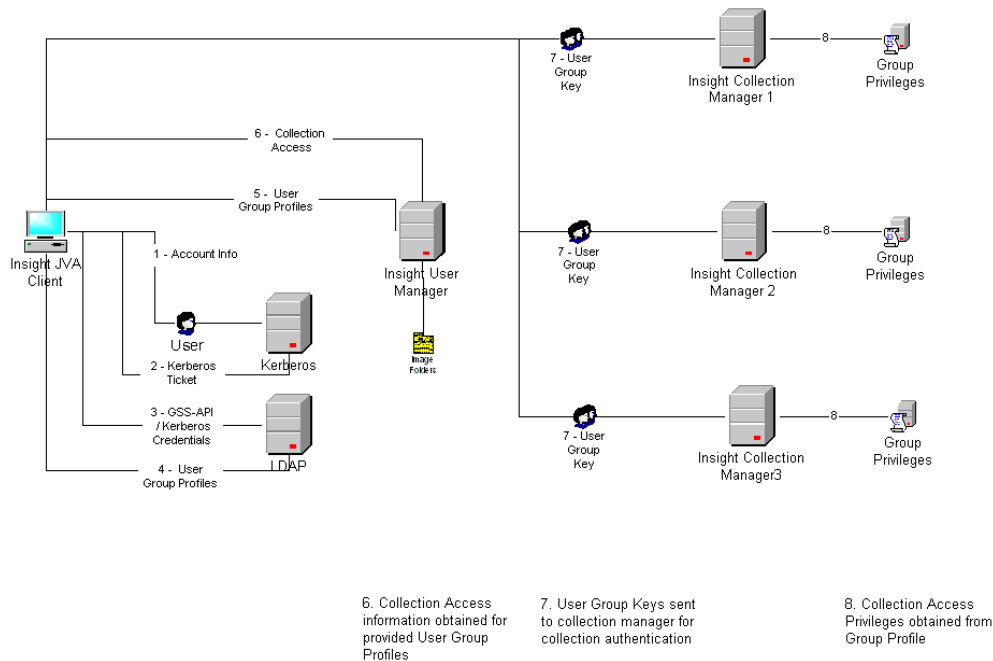
Secure Socket Layer (SSL) Communications require a certificate to encrypt data during transit, as well as to prove the identity of each party involved. For public use, trusted certificate authorities (i.e. Verisign, Thawte) provide trusted SSL certificates. Insight's LDAP Authentication method will automatically recognize and support Verisign & Thawte SSL Certificates.

## Kerberos & LDAP Authentication and Authorization

**NOTE:** Changing Insight's Security model can have major repercussions. Please consult with your network and security administrators before implementing **any** changes regarding your local security environment.

**NOTE:** Please read and complete the Insight Security Worksheet at the end of this chapter before going any further.

**NOTE:** Finally, please test all configurations on a **test server** before implementing in a production environment.



### Kerberos Authentication - Overview

Kerberos Version 5 is used for both the authentication and secure communication aspects of the Luna client and server applications. In order to use the Kerberos authentication method, you will need access to a Kerberos installation. To configure the Insight User Manager, you will need the default realm and the default KDC of your Kerberos installation. Contact your network administrator responsible for the Kerberos server for these configurations.

As with all Kerberos installations, a Kerberos Key Distribution Center (KDC) is required. It needs to contain the user name and password you will use to be authenticated to Kerberos. Note: A KDC implementation is part of a Kerberos installation, not a part of the Insight installation.

The essential Kerberos configuration information is the default realm and the default KDC. Typically, the default realm and the KDC for that realm are indicated in the Kerberos `krb5.conf/krb5.ini` configuration file. On Windows, the `krb5.ini` file can be located in `c:\winnt\`. On Unix, the file is located in the `/etc/` directory. If this file does not exist or you are unsure of the configurations, contact your network administrator responsible for the Kerberos server for these settings.

To minimize client configuration requirements, Insight provides a version of the Kerberos configuration file to each Insight client when Kerberos authentication is used. This file is written to the application's installation directory and has no impact upon the `krb5.conf/krb5.conf` file that may or may not reside on your system. Insight uses this file for the default realm and default KDC information. These values are defined in the `InsightUserManager.dat` file located in the Insight User Manager sub-directory.

## Specifying the Kerberos Settings

- 1) In a text editor, open the `InsightUserServer.dat` file located in the "`<insight_install>\user_manager`" directory.
- 2) Define the **KerberosRealm** property. This is the default Kerberos realm to which the user will be authenticated. This Kerberos Realm will be attached to the user ID's for authentication. The Kerberos Realm must be defined in ALL CAPS. (e.g. `KerberosRealm = LUNAIMAGING.COM`).
- 3) Define the **KerberosServer** property. This is the default Kerberos Key Distribution Center (e.g. `KerberosServer = kerberos1.lunaimaging.com`).

If you are unsure of these values, you may wish to submit the Implementation Worksheet to your system administrator responsible for Kerberos and Directory Services.

For example, say I was unsure of the default realm and default KDC used at my institution. After contacting my network administrator, he/she provides the following information:

```
Default Realm = LUNAIMAGING.COM
Default KDC = kerberos1.lunaimaging.com
```

With this information, I open the `InsightUserServer.dat` file located in the Insight User Manager installation directory. In this example, I define the `KerberosRealm` as `LUNAIMAGING.COM`. I also define the `KerberosServer` as `kerberos1.lunaimaging.com`. It is important to note that the Kerberos Realm is defined in ALL CAPS. Under Windows 2000/Active Directory, the Kerberos Realm is usually the same as the Active Directory domain name. On Solaris, the Kerberos Realm may or may not be the same as your domain, but conventions encourage using the domain name, in upper-case letters. In this example, members of `lunaimaging.com` are in the Kerberos realm `LUNAIMAGING.COM`.

```
KerberosRealm = LUNAIMAGING.COM
KerberosServer = kerberos1.lunaimaging.com
```

Based on the example above, the `krb_config.conf` file created on the client's application installation directory would contain the following information:

```
### insight krb_config.conf file ###
```

```
[realms]
LUNAIMAGING.COM = {
    kdc = kerberos1.lunaimaging.com
}

[domain realm]
.lunaimaging.com = LUNAIMAGING.COM

### end insight krb config.conf file ###
```

## Enabling Kerberos Authentication for the Insight User Manager

In order to enable the Kerberos Authentication Handler, in the InsightUserServer.dat file, modify the AuthenticationHandler property to reference the KerberosAuthenticationHandler instead of the standard Insight DefaultAuthenticationHandler. Save changes and restart the Insight User Manager.

For example, the AuthenticationHandler property should appear as below:

```
AuthenticationHandler =
com.luna.insight.client.security.KerberosAuthenticationHandler
```

If you wish to later re-enable the standard Insight User Database authentication method, simply replace the line above with "AuthenticationHandler = com.luna.insight.client.security.DefaultAuthenticationHandler". Save changes and restart the Insight User Manager.

## LDAP Authorization - Overview

LDAP (Lightweight Directory Access Protocol) is a software protocol for enabling individuals and applications to locate information about organizations, individuals, and other resources. In the case of Insight, the LDAP Directory is used to store Insight authorization information. Insight uses the Kerberos credentials obtained during the Kerberos authentication process to gain access to the LDAP Directory Service. The use of Kerberos authentication by the LDAP Server unites the LDAP services with the Kerberos credentials and Kerberos based services. This also removes the need for Insight to ever store administrative passwords to the LDAP Directory service.

The use of Kerberos credentials for LDAP Directory access requires an LDAP Server supporting the GSS-API SASL mechanism. The Generic Security Service API (GSS-API) provides a common interface for accessing different security services, such as Kerberos V5. Simple Authentication and Security Layer (SASL) is the mechanism used to authenticate against another service using existing Kerberos credentials. The GSS-API SASL mechanism is only supported by LDAP v3 Servers. The LDAP Servers that support the GSS-API SASL mechanism include Windows 2000's Active Directory Server, OpenLDAP, and the SunONE Directory Server v5.2.

The use of an LDAP Server for Insight authorization requires the ability to assume the identity of the authenticated Kerberos principal. In other words, the Kerberos Principal Name provided during authentication must also be present in the LDAP Directory. For example, if your Kerberos principal name is jsmith@foobar.com, an attribute containing the value "jsmith@foobar.com" must exist in the directory.

## Specifying the LDAP Settings

- 1) In a text editor, open the InsightUserServer.dat file located in the "`<insight_install>\user_manager`" directory.
- 2) Define the URL for the LDAP v3 Server:

- a. Locate the following lines:

```
##
# LdapURL - The URL of the LDAP server.
# (note: under Windows 2000/Active Directory, this is the
# address # of the Active Directory machine pre-pended with
# ldap:// )

#LdapURL = ldap://ldap.lunaimaging.com
```

- b. Uncomment the LdapURL property and change it to match the URL for your LDAP Server. When done, it should look like this:

```
##
# LdapURL - The URL of the LDAP server.
# (note: under Windows 2000/Active Directory, this is the
# address # of the Active Directory machine pre-pended with
# ldap:// )

LdapURL = ldap://your.ldap.server.edu
```

- 3) Define the LDAP User Path, this is the directory path in the LDAP Server identifying where to find valid users.

- a. Locate the following lines:

```
##
# LdapUserPath: Directory path in the LDAP server
# identifying object containing authenticatable users.

LdapUserPath = ou=people,dc=lunaimaging,dc=com
```

- b. Uncomment the LdapUserPath property and set it to the path in the LDAP database that Insight should use to find valid users. When complete, it should look like this:

```
##
# LdapUserPath: Directory path in the LDAP server
# identifying object containing authenticatable users.

LdapUserPath = ou=people,dc=lunaimaging,dc=com
```

- 4) Define the field in the LDAP database that contains the Insight User Profile:

- a. Locate the following lines:

```
##
#TargetAttributeName - The LDAP attribute name which stores
```

```
# the collection data/profile ID's needed by the
# application.

#(note: in the case of Active Directory, "info" is the "notes"
field under the "telephones" tab in a user's properties.)

#TargetAttributeName = info
```

- b. Uncomment and define the **TargetAttributeName** property. This is the LDAP attribute in which the Insight Access Profile may be found. This is the LDAP attribute name containing the Insight Access Profile needed for authorization. Insight requires the use of an LDAP attribute name, which stores the collection access information. For Windows 2000 Active Directory, by default, the "info" attribute is used. See the Windows® Active Directory & Insight User Account Information section of the documentation for additional details. For other LDAP Servers, you will need to determine which attribute is currently unused, or create a new attribute to store the Insight Access Profile.

#### 5) Define User metadata fields in the LDAP Directory.

- c. Locate the following lines:

```
##
#UserAttributeName - The LDAP directory attribute name under which
the user's unique login name can be found.

#UserAttributeName = userprincipalname

# User Info Attributes - Added 2003-07-24

#OrganizationAttributeName      = company

#EmailAttributeName             = mail

#PhoneAttributeName             = homePhone
```

- d. Uncomment and define the **UserAttributeName**, **OrganizationAttributeName**, **EmailAttributeName**, and **PhoneAttributeName** properties. The User Attribute name is the LDAP attribute in which the full Kerberos name may be found. This attribute is used to uniquely identify the user when searching the LDAP directory. The values stored in this field MUST be of the form: <YOUR USERNAME>@<YOUR KERBEROS REALM>. For Windows 2000 Active Directory, this attribute will always be "userprincipalname". For OpenLDAP using the kb5-kdc.schema, this attribute will be the "krb5PrincipalName" (e.g. UserAttributeName = userprincipalname).

The **OrganizationAttributeName** property is the LDAP attribute in which the user's organizational membership information is stored. Obtained values are used for administrative purposes within Inscribe. For Windows 2000 Active Directory, the "company" attribute is used to store this information. For OpenLDAP using the EduPerson schema, the "organizationName" attribute will typically be used.



The **EmailAttributeName** property is the LDAP attribute in which the user's e-mail address information is stored. Obtained values are used for administrative purposes within Inscribe. For Windows 2000 Active Directory, the "mail" attribute is used to store this information. For OpenLDAP using the EduPerson schema, the "mail" attribute will typically be used.

The **PhoneAttributeName** property is the LDAP attribute in which the user's telephone contact information is stored. Obtained values are used for administrative purposes within Inscribe. For Windows 2000 Active Directory, the "homePhone" attribute is used to store this information. For OpenLDAP using the EduPerson schema, the "telephonePhone" attribute will typically be used.

## Enabling LDAP Authorization for the Insight User Manager

In order to enable the LDAP Authorization Handler, in the InsightUserServer.dat file, modify the AuthorizationHandler property to reference the LDAPAuthorizationHandler instead of the standard Insight DefaultAuthorizationHandler. Save changes and restart the Insight User Manager.

For example, the AuthorizationHandler property should appear as below:

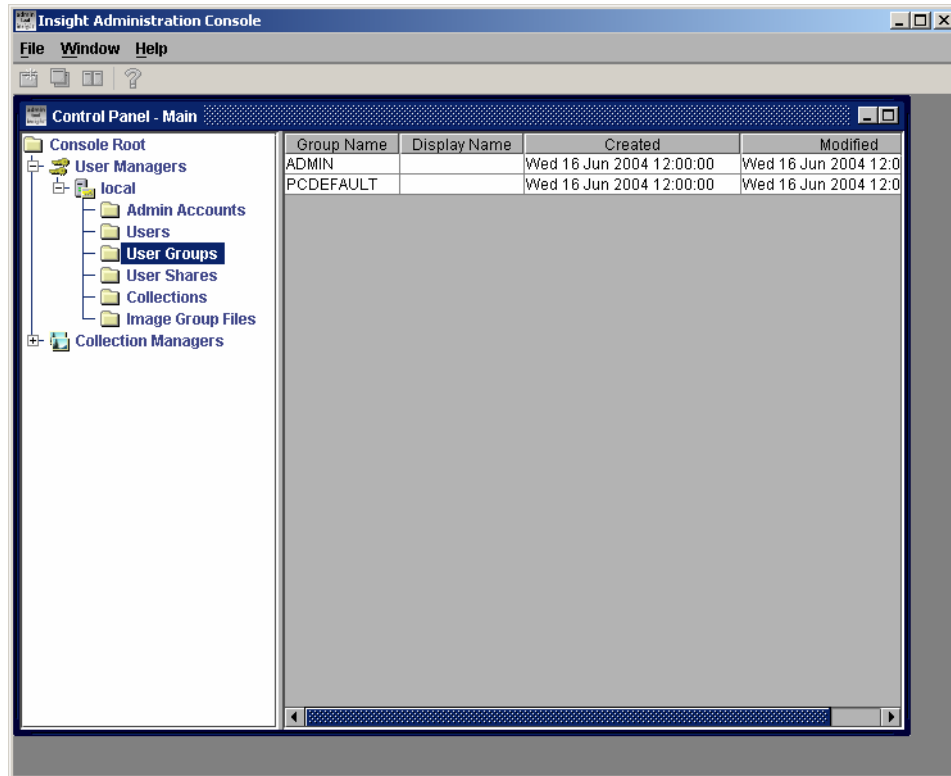
```
AuthorizationHandler =  
com.luna.insight.client.security.LDAPAuthorizationHandler
```

## Interaction of Kerberos & LDAP Users and Users in the Insight User Table

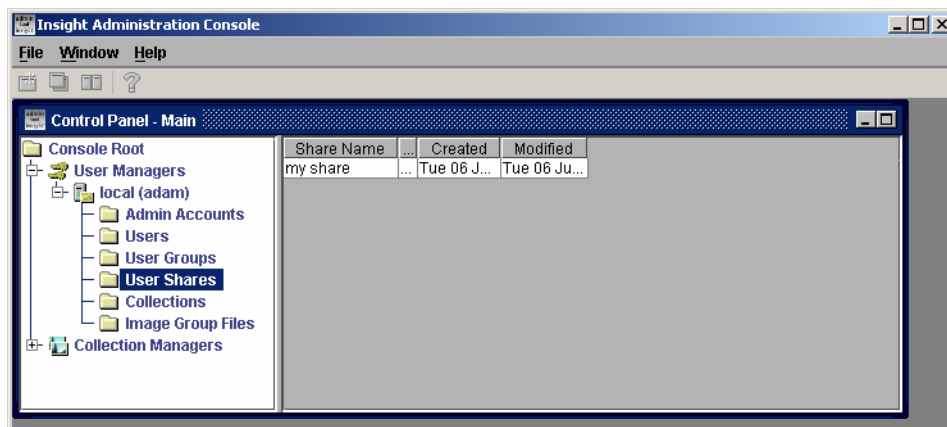
**NOTE:** Before enabling Kerberos & LDAP, please ensure that you delete all users from the Users tab in the Insight Administrator Tools. Maintaining existing users in the Insight User Manager introduces a potential security hole as clients that are not enabled for Kerberos & LDAP security will continue to try and authenticate using the Standard Authentication method.

## Using the Insight Administrator Tool to identify Insight Access Profiles

- 1) Launch the Insight Administrator Tools.
- 2) Expand the User Manager node and connect to your default Insight User Manager.
- 3) Click on the User Groups node. User Groups determine how users access collections.



- 4) Identify the User Groups you want to be associated with an LDAP user account. For example, from the illustration above, ADMIN and PCDEFAULT will be used to associate with the user's LDAP directory entry. Multiple User Groups can be separated by commas.
- 5) Click on the User Shares node. User Shares are places where end-users can save groups, presentations, or annotations.



- 6) Identify the User Shares you want to be associated with the LDAP user account. In the example above "my share" will be used to associate with the user's LDAP directory entry. Multiple Shares can be separated with commas.
- 7) Creating the LDAP string:

- a. Combine each of the User Group names, separating them with commas.
- b. For each User Share, define whether the user should have read, write, delete privileges.
- c. Combine each of the User Share Names with /w for read/write privileges. /wd for read / write / delete, or just the share name for read-only.
- d. Combine the Shares and privileges together, separating them with commas.
- e. Combine the list of all User Groups and all User Shares separating the groups with a colon. See example below:

```
UserGroup1,UserGroup2:UserShare1,UserShare2/wd
```

In this example above, the user has been given rights to access collections within UserGroup1, UserGroup2. The user also has read-only privileges to UserShare1, and read-write-delete for UserShare2.

- 8) Populate the LDAP Insight Profile Attribute with the Insight Access Profile. For Active Directory follow the Windows Active Directory & Insight User Account Information section of this document. If you are using OpenLDAP, you will need to update the directory records through the OpenLDAP command-line interface. Consult your user documentation for details.

## Windows® Active Directory & Insight User Account Information

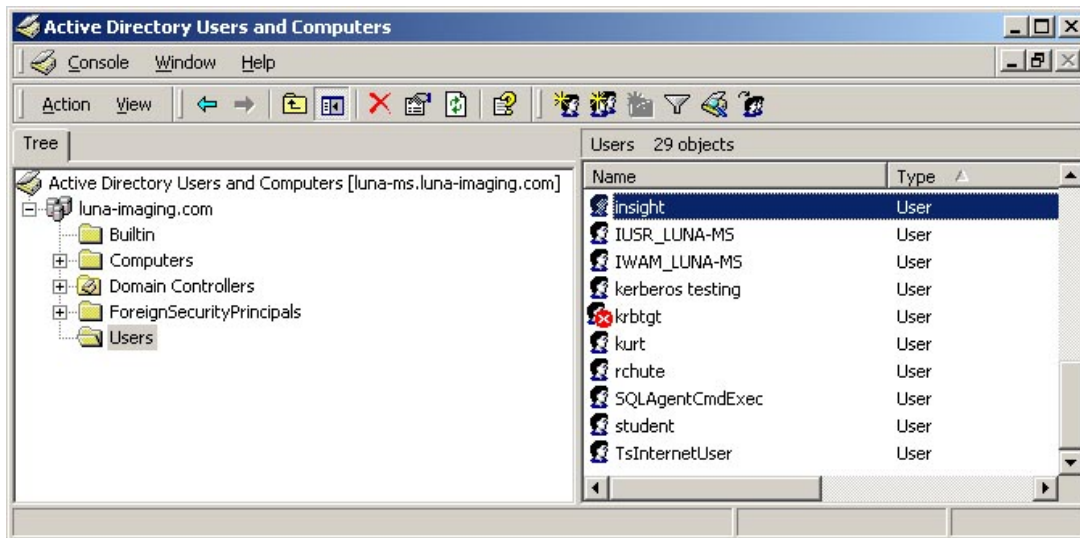
The Windows 2000 operating system implements the Kerberos network authentication protocol as its default authentication method. On a Windows 2000 Domain Controller, both Kerberos and LDAP account information are managed using the Active Directory management consoles. Each Windows 2000 Domain Controller also represents a Kerberos Key Distribution Center.

Users belonging to a Windows 2000 domain are managed through the Active Directory Users and Computers management console. To access the Active Directory Users and Computers console you will need administrative privileges on the domain controller you are using as your primary KDC for Insight. You may need to provide the following information to your network administrator responsible for Active Directory Administration.

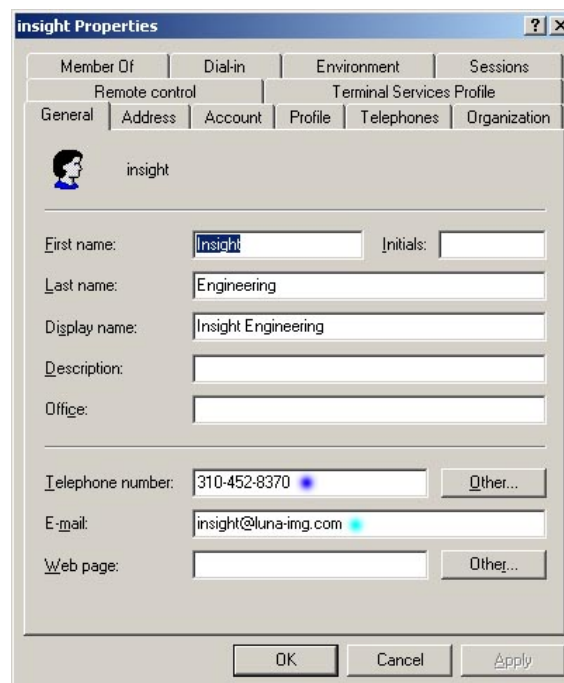
Prior to managing user accounts using Active Directory, ensure that you have defined the User Group Profiles within the Insight Administrator Tool. Refer to the Insight Administrator Tool documentation for details.

### To Manage Insight User Account Information using Active Directory

- 1) Log-on to the Windows 2000 Domain Controller with administrative privileges.
- 2) Click Start -> Program Files -> Administrator Tools -> Active Directory Users and Computers.
- 3) In the Active Directory Users and Computers, click the Users directory under the appropriate domain.



- 4) Double-click on a user account you wish to grant Insight Access to.
- 5) Once the Properties window appears, a series of tabs will appear along the top. The General Properties tab contains the basic information about the user.



The Telephone Number and E-mail address entries are used by Inscribe during authorization to update editorial contact information. No modifications are necessary in the General Properties tab.

- 6) Click the Telephones tab to the right of General Properties. Insight requires the use of an LDAP attribute name, which stores the collection access information (e.g. Notes).

In this example, the Notes text box is used to store the Insight Access Profile information, but any unused attribute name may be configured to store this property. User accounts may be associated with a single profile, or multiple profiles by separating each profile name with a comma. See the illustration above for an example.

- 7) Apply Changes to save the defined Insight Access Profile.

## Restoring the Default Security Configuration for Insight

---

- 1) In a text editor, open the InsightUserServer.dat file located in the "<insight\_install>\user\_manager" directory.
- 2) Change the Insight Authentication Handler to the default Handler:
  - a. Locate the following lines:

```
##
# AuthenticationHandler - the full class name of the
# authentication handler to use for authentication.

AuthenticationHandler =
com.luna.insight.client.security.DefaultAuthenticationHandler
```

- b. Change the AuthenticationHandler property to:
 

```
com.luna.insight.client.
security.DefaultAuthenticationHandler.
```

 This will tell the User Manager not to use Kerberos or LDAP when authenticating users.

3) Change the Authorization Handler to the Default Handler:

a. Locate the following lines:

```
##  
# AuthorizationHandler - the full class name of the  
# authorization handler to use for authorization.  
AuthorizationHandler =  
com.luna.insight.client.security.DefaultAuthorizationHandler
```

Change the AuthorizationHandler property to:

`com.luna.insight.client.security.DefaultAuthorizationHandler`. This will tell the User Manager not to use Kerberos or LDAP when authorizing users.

## Resources

---

Windows 2000 Kerberos Interoperability, Microsoft Whitepaper

<http://www.microsoft.com/technet/prodtechnol/windows2000serv/deploy/confeat/kerberos.mspix>

Kerberos interoperability issues - Paul B. Hill - MIT

<http://www.usenix.org/events/lisa-nt2000/hill/hill.html/>

Kerberos Infrastructure HOWTO

<http://cryptnet.net/fdp/admin/kerby-infra/en/kerby-infra.html>

GSS-API/Kerberos v5 Authentication

<http://java.sun.com/products/jndi/tutorial/ldap/security/gssapi.html>

Generic Security Service API Version 2: Java Bindings

<http://www.faqs.org/rfcs/rfc2853.html>

A Recipe for Configuring and Operating LDAP Directories

<http://www.georgetown.edu/giia/internet2/ldap-recipe/>

Using LDIFDE to Import and Export Directory Objects to Active Directory

<http://support.microsoft.com/default.aspx?scid=http://support.microsoft.com:80/support/kb/articles/Q237/6/77.ASP&NoWebContent=1>

## **Insight Security Release – Implementation Worksheet**

---

### **Kerberos Settings (Kerberos & LDAP Only)**

The Kerberos implementation is (select one): MIT Kerberos V5 KDC (Unix)  
Windows 2000 Domain Controller

Realm/Domain Name \_\_\_\_\_  
KDC Instance \_\_\_\_\_  
Kerberos Principal Name for testing \_\_\_\_\_

### **LDAP Settings (Pure LDAP / Kerberos & LDAP)**

The LDAP implementation is (select one): OpenLDAP 2.1+  
Windows 2000 Domain Controller  
Sun ONE Directory Server 5.2

LDAP Server URL \_\_\_\_\_  
BaseDN \_\_\_\_\_  
Krb5PrincipleName Attribute Name \_\_\_\_\_  
Insight Profile Attribute Name \_\_\_\_\_  
Organization Attribute Name \_\_\_\_\_  
E-mail Attribute Name \_\_\_\_\_  
Phone Attribute Name \_\_\_\_\_

### **User Authorization - Account Information**

Account Login Name \_\_\_\_\_  
Insight Profile Value \_\_\_\_\_



# JDBC Database Configuration Properties

Database	MySQL	Oracle 8i / 9i	MSSQL	MSSQL
Driver	MySQL	Oracle 8i / 9i	iSprinta	JTDS
Filename	mysql-connector.jar	classes12.jar and nls_charset12.jar	Sprinta2000.jar	jtds.jar
Database Connect String	See below	See below	See below	See below
Java Class	com.mysql.jdbc.Driver	oracle.jdbc.driver.OracleDriver	com.inet.tds.TdsDriver	net.sourceforge.jtds.jdbc.Driver
JDBC URL	jdbc:mysql://	jdbc:oracle:thin:	jdbc:inetdae7:	jdbc:jtds:sqlserver://
Uses Username & Password Properties	NO, in connect string	Yes	NO, in connect string	NO, in connect string
Database Query Mode	1 (intermediate)	8i: 0 (Entry level) 9i: 1 (intermediate)	1 (intermediate)	1 (intermediate)
Use Distinct Keyword	1 (yes)	1 (yes)	1 (yes)	1 (yes)
Left Escape Delimiter	\\ *		[	[
Right Escape Delimiter			]	]
Character Wildcard	_	_	_	_
String Wildcard	%	%	%	%
Global Escape Delimiter	\\ *			
Unicode Field Prefix			N	N
* NOTE: the "\\\" is translated to "\" when the property file is read				

### Example with the Sprinta Driver:

```
DatabaseConnect =  
dalton.org:1433?database=DaltonColl&sql7=true&user=YourDBUsername&  
password=YourDBpassword
```

#### Where:

Hostname	<i>dalton.org/</i>	<i>use your hostname</i>
Port	<i>:1433</i>	<i>default, only change if needed</i>
Database name	<i>database=DaltonColl</i>	<i>use your database name</i>
SQL version	<i>sql7=true</i>	<i>default, should not change</i>
DB Username	<i>user=YourDBUser</i>	<i>use your DB Username</i>
SQL version	<i>password=YourDBPassword</i>	<i>use your DB Password</i>

### Example with the jTDS Driver:

```
DatabaseConnect = dalton.org:1433/  
DaltonColl;user=YourDBUsername;password=YourDBpassword
```

#### Where:

Hostname	<i>dalton.org/</i>	<i>use your hostname</i>
Port	<i>:1433</i>	<i>default, only change if needed</i>
Database name	<i>DaltonColl</i>	<i>use your database name</i>
DB Username	<i>user=YourDBUser</i>	<i>use your DB Username</i>
DB Password	<i>password=YourDBPassword</i>	<i>use your DB Password</i>

### Oracle Example:

```
DatabaseConnect = @dalton.org:1521:YourSID
```

#### Where:

Hostname	<i>@dalton.org/</i>	<i>use your hostname</i>
Port	<i>:1521</i>	<i>default, only change if needed</i>
SID	<i>YourSID</i>	<i>use your SID</i>

### MySQL Example:

```
DatabaseConnect =  
mysql.dalton.org:3306/YourDB?user=insight&password=insight&useUnic  
ode=true&characterEncoding=utf8
```

#### Where:

Hostname	<i>mysql.dalton.org/</i>	<i>use your hostname</i>
Port	<i>:3306</i>	<i>default, only change if needed</i>
DatabaseName	<i>YourDB</i>	<i>use your database name</i>
DB Username	<i>user=YourDBUser</i>	<i>use your DB Username</i>
DB Password	<i>password=YourDBPassword</i>	<i>use your DB Password</i>

# Introduction to the Insight Configuration Files

---

Each of the Insight Components (server and client) use configuration files which enable them to run properly. Below is a list of Insight configuration files and configuration options:

## Collection Manager and Personal Insight Manager

---

The Collection Manager is controlled by InsightServer.dat, which is used to set up database connections and manage the server. diacriticmappings.dat is used in indexing and to help with handling special characters.

Configuration files for the Collection Manager and Personal Insight Manager can be found inside the "Collection Manager" or "Personal Insight" directory inside the installation directory.

Task	InsightServer.dat	DiacriticMappings.dat
Changing the server's database connection <ul style="list-style-type: none"><li>- username &amp; password</li><li>- database name</li><li>- hostname of the database server</li><li>- database port</li></ul>	X	
Changing database SQL properties <ul style="list-style-type: none"><li>- escape characters &amp; other information</li></ul>	X	
Changing the debug mode	X	
Changing the database debug mode	X	
Changing the Collection Manager's port	X	
Changing where server-managed files are created: <ul style="list-style-type: none"><li>- Presentation files</li><li>- Group files</li><li>- Annotations</li></ul>	X	
Changing the server timeouts	X	
Changing logging settings	X	
Specifying a media information table to store technical metadata	X	
Private keys & connection information between the Media Manager and Collection Manager	X	
Configuring alternate values for accented text (characters with diacritics) to enable better searching		X
Configuring Service Wrapper properties	X	
Default Base URL for Themes	X	
Default Base Path for Themes (filesystem)	X	
Default BrowserInsight RemoteLaunch Base URL	X	
Default Java Client RemoteLaunch Base URL	X	
License Folder Location (pre-5.1)	X	

## User Manager

---

The User Manager is controlled by InsightUserServer.dat, which is used to set up database connections and manage the server.

Configuration files for the User Manager can be found inside the "User Manager" directory inside the installation directory.

Task	InsightUserServer.dat
Changing the server's database connection <ul style="list-style-type: none"><li>- username</li><li>- password</li><li>- database name</li><li>- hostname of the database server</li><li>- database port</li></ul>	X
Changing database SQL properties <ul style="list-style-type: none"><li>- escape characters</li><li>- etc.</li></ul>	X
Changing the debug mode	X
Changing the database debug mode	
Changing the Collection Manager's port	X
Changing Cross-Collection searching defaults (bg. Color / image)	X
Changing the server timeouts	X
Changing logging settings	X
Configuring Kerberos / LDAP authentication methods	X
Configuring Service Wrapper properties	X
License Folder Location (pre-5.1)	X

## Media Manager

---

The Media Manager provides access to all images and media in Insight and runs as a servlet within Tomcat. The main configuration file for the Media Manager is the MediaManager.dat, located in the “media\_manager” directory of the installation directory. A few other configuration settings (including the location of the mediamanager.dat are also specified in the server.xml.additions.txt and the web.xml).

Task	MediaManager.dat	Server.xml additions	Web.xml
Where the servlet is located and servlet startup / reload properties		X	X
Servlet name and URL		X	X
Where the mediaManager.dat file is located	X		
Where media is stored	X		
The max resolution managed by the Media Manager	X		
Debug level	X		
Where the SID Server is	X		
Private keys & connection information between the Media Manager and Collection Manager	X		
Logging information	X		
Ticketing properties for the Media Manager	X		
License Folder Location (pre-5.1)	X		

## BrowserInsight

---

BrowserInsight is the server component that manages access for the browser components and runs as a servlet within Tomcat. The main configuration file for BrowserInsight is BrowserInsight.conf, located in the “browserInsight” directory of the installation directory. A few other configuration settings (including the location of the BrowserInsight.conf are also specified in the server.xml.additions.txt and the web.xml).

Task	BrowserInsight.conf	Server.xml additions	Web.xml
Where the servlet is located and servlet startup / reload properties		X	X
Servlet name and URL		X	X
Where the BrowserInsight.conf file is located	X		
User Manager address	X		
Default username and password	X		
Debug level	X		
Access logging settings	X		
Private keys & connection information between the Media Manager and Collection Manager	X		
SSL settings	X		
Collection database configuration settings (per collection available in the browser)	X		
Max Values available in a speed search	X		
License Folder Location (pre-5.1)	X		

## XML Gateway

---

The XML Gateway is a middleware component that provides access to Insight's content to XML-aware applications and runs as a servlet within Tomcat. The main configuration file for the XML Gateway is web.xml, located in the xmlgateway/servlet/WEB-INF/ directory of the installation directory. The XML Gateway is also controlled by the server.xml.additions.txt.

**Table 25: XML Gateway Configuration Files**

Task	Server.xml additions	Web.xml
Where the servlet is located and servlet startup / reload properties	X	X
Servlet name and URL	X	X
Debug level		X
User Manager Address		X
Username and Password for User Manager		X
Unknown character replacement character		X
License Folder Location (pre 5.1)	X	

## Insight Client Applications

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Please see Table 24: Consolidated Properties by Client Application on page 290.

## Insight Administrator Tools

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The Administrator Tools maintains a configuration file (insightadminstore.dat) which should not be edited by hand.



# Index

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## A

Access.....170, 172, 174, 277, 279, 280, 282, 283, 285, 294  
Admin Tools ..... 14, 30, 55, 113, 167, 192, 295  
Apache 10, 31, 161, 175, 182, 185, 186, 207, 208, 219, 238, 240  
Authentication..... 23, 38, 41, 173, 270, 271, 275, 277, 280, 285, 286  
Authorization..... 270, 271, 275, 277, 278, 280, 285, 287

---

## B

Background Image.....256  
BrowserInsight... 14, 16, 20, 27, 29, 41, 147, 148, 151, 155, 161, 164, 166, 169, 177, 178, 179, 180, 181, 182, 188, 194, 195, 209, 210, 211, 212, 213, 236, 237, 238, 239, 241, 242, 243, 247, 255, 256, 267, 291, 293, 294  
BrowserInsight.conf. 16, 147, 164, 177, 178, 179, 181, 209, 210, 211, 237, 238, 255, 256, 293, 294  
Bundle.....200, 223, 231, 233

---

## C

Cataloging Template.....34, 167, 185  
Code Key.....153  
Collection Manager.. 12, 14, 16, 20, 21, 23, 24, 25, 27, 31, 33, 34, 35, 36, 37, 47, 102, 108, 147, 148, 150, 151, 153, 155, 159, 160, 161, 166, 167, 170, 171, 172, 173, 175, 177, 178, 179, 180, 181, 184, 185, 188, 192, 195, 202, 203, 209, 211, 212, 229, 230, 247, 250, 252, 254, 255, 267, 291, 292, 293, 294  
CollectionID .....17  
Connect String .....211, 288  
Console ..... 23, 24, 184, 188, 248, 249, 250, 252, 255

---

## D

DAR.....222, 228, 229, 232, 233  
DB2.....25, 169, 212, 253  
Debug..... 195, 248, 249, 255, 257, 293, 294, 295  
Delimiter .....288  
Deploy Director 14, 199, 200, 218, 219, 220, 221, 222, 223, 224, 228, 229, 231, 232, 233, 234, 235, 260, 262  
DiacriticMappings.dat.....291  
Driver.....211, 212, 253, 288, 289

---

## E

Export.....286

---

## F

Fields.....167

---

## G

Group Name ..... 108, 153  
Groups.....153, 173, 281, 282

---

## H

Help.....208  
Hierarchy.....206

---

## I

IIS.....175  
Indexer .....14, 108, 167, 168, 169  
Inscribe... 2, 12, 14, 108, 148, 150, 151, 166, 175, 246, 259, 260, 262, 264, 265, 266, 269, 280, 284  
Insight.dat.....199, 224, 261, 262, 263, 264, 265  
InsightServer.dat 16, 34, 147, 171, 177, 204, 229, 230, 252, 253, 255, 291  
Installation Location. 21, 102, 148, 156, 183, 184, 186, 262  
Institution ID ..... 21, 30, 171  
InstitutionID .....17  
IP Restrictions .....208

---

## J

Java 12, 29, 46, 47, 153, 169, 170, 179, 182, 190, 199, 200, 201, 208, 216, 218, 219, 224, 230, 242, 243, 244, 260, 261, 264, 266, 286, 288, 291  
Java Client..... 12, 29, 46, 47, 153, 169, 170, 179, 182, 199, 200, 216, 218, 224, 230, 260, 261, 264, 266, 291, 295  
JDBC.....288  
JPEG2000..... 12, 13, 74, 162, 163, 188, 189, 190, 192, 241, 244

---

## K

Kerberos..270, 271, 275, 276, 277, 278, 279, 280, 282, 285, 286, 287, 292

---

## L

LDAP.....270, 271, 272, 273, 274, 275, 277, 278, 279, 280, 281, 282, 284, 285, 286, 287, 292  
License.16, 44, 216, 219, 220, 291, 292, 293, 294, 295  
Linux.....15, 25, 46, 47, 102, 182, 186, 201, 205, 206, 219, 222, 242, 243, 244, 249, 250, 260  
Log.....14, 148, 255, 283  
Logging.....255, 293

---

## M

Mapping.....149  
Media .....2  
Media Manager..... 12, 14, 16, 17, 20, 22, 27, 33, 102, 108, 148, 154, 155, 162, 163, 169, 175, 176, 177, 178, 179, 180, 181, 182, 188, 189, 191, 192, 193, 211, 212, 213, 241, 245, 247, 266, 267, 268, 291, 293, 294  
Media Processing .....256  
Microsoft SQL Server..... 10, 22, 23, 203, 252, 253

---

## O

Oracle..10, 21, 22, 24, 34, 37, 38, 41, 64, 66, 119, 121, 147, 151, 152, 153, 169, 203, 212, 252, 253, 288, 289  
Oracle 8i .....288  
OS X .....262, 265, 266  
OSX .....261, 262

---

## P

Packaging..... 46, 47, 182, 199, 259, 260  
PC Anywhere.....25  
Performance .....257  
Personal Insight . 12, 14, 16, 17, 20, 21, 22, 23, 24, 25, 27, 31, 33, 34, 35, 47, 166, 167, 175, 178, 184, 185, 188, 195, 201, 202, 203, 209, 210, 247, 249, 250, 251, 252, 255, 266, 267, 268, 291  
Port .21, 22, 32, 35, 147, 148, 161, 171, 194, 207, 252, 254, 255, 267, 289  
Presentation.....291  
Profiles..... 175, 176, 192, 280, 283  
Proxy.....267, 268

---

## Q

QTVR .....17, 20, 266

QuickTime ..... 266

---

## R

Record Fields ..... 167  
Remote Launch ..... 229, 230  
Resin .. 16, 32, 148, 161, 182, 188, 194, 196, 217, 237, 238, 240, 241, 243, 244, 245

---

## S

Security .. 177, 179, 180, 181, 182, 191, 192, 209, 237, 270, 271, 275, 277, 285, 286, 287  
Server.xml .....293, 294, 295  
Service 21, 22, 147, 201, 202, 203, 204, 205, 206, 277, 286, 291, 292  
Servlet 14, 32, 186, 188, 208, 209, 210, 217, 240, 241, 242, 243, 244, 293, 294, 295  
Shares .....153, 281, 282  
SID 17, 21, 22, 34, 38, 64, 66, 119, 121, 147, 203, 289, 293  
SOCKS..... 267, 268  
Solaris 15, 25, 102, 183, 184, 186, 192, 193, 201, 205, 206, 219, 222, 242, 243, 244, 249, 250, 260, 276  
Space ..... 20, 21  
SPS.....175, 176, 177, 178, 192  
SQL .... 10, 22, 23, 37, 38, 41, 151, 152, 153, 203, 252, 253, 254, 256, 289, 291, 292  
SSL.. 186, 188, 236, 237, 239, 270, 271, 272, 275, 294  
Standalone ..... 32

---

## T

Tablespace..... 24  
Template..... 34, 185  
Temporary ..... 265  
Terminal Services..... 25  
Tomcat . 10, 14, 16, 20, 22, 27, 31, 32, 33, 41, 42, 148, 154, 155, 161, 169, 175, 179, 182, 185, 186, 187, 188, 189, 190, 194, 196, 201, 206, 207, 208, 217, 219, 229, 236, 237, 238, 239, 240, 241, 242, 243, 244, 245, 255, 293, 295

---

## U

Unicode ..... 24, 288  
Upgrade.... 14, 101, 102, 103, 108, 147, 148, 150, 151, 152, 153, 154, 155, 156, 157, 158, 159, 160, 161, 164, 165, 166, 167, 169, 175, 177  
URL 147, 148, 178, 179, 192, 196, 212, 229, 230, 232, 245, 272, 278, 287, 288, 291, 293, 294, 295  
User Groups ..... 281, 282  
User Manager12, 14, 16, 20, 21, 22, 23, 24, 25, 27, 29, 30, 31, 32, 35, 38, 40, 41, 42, 46, 47, 108, 147, 148, 151, 152, 153, 155, 157, 158, 159, 166, 170, 172, 174, 175, 178, 182, 183, 184, 185, 198, 199, 201,

202, 203, 206, 209, 210, 216, 217, 224, 229, 233,  
245, 247, 249, 250, 251, 252, 254, 255, 259, 262,  
263, 267, 270, 271, 272, 274, 275, 276, 277, 280,  
281, 285, 292, 294, 295  
User Manager Address... 21, 22, 29, 42, 147, 148, 157,  
199, 216, 229, 245, 263, 295  
UTF-8 .....24

---

## V

Video ..... 17, 20, 266  
VNC.....25

---

## W

Web.xml .....208, 293, 294, 295  
WEB-INF..... 16, 165, 208, 216, 245, 295

Windows .... 10, 15, 21, 22, 23, 25, 26, 28, 46, 47, 102,  
147, 154, 156, 182, 183, 184, 186, 193, 201, 203,  
204, 205, 219, 221, 242, 244, 249, 250, 259, 260,  
261, 262, 265, 266, 270, 271, 272, 276, 278, 279,  
280, 282, 283, 286, 287  
Windows 2000 265, 266, 270, 271, 272, 276, 278, 279,  
280, 282, 283, 286, 287

---

## X

XML..... 13, 14, 16, 20, 27, 42, 43, 148, 155, 164, 165,  
166, 167, 180, 188, 195, 196, 197, 198, 208, 216,  
217, 241, 244, 245, 247, 295  
XML Gateway.... 13, 14, 16, 20, 27, 42, 148, 155, 164,  
165, 166, 167, 180, 188, 195, 196, 197, 198, 216,  
217, 241, 244, 245, 247, 295