

# SWEET and Institutional Search Installation and Upgrade Guide

- [Prerequisites](#)
- [Installation Procedure](#)
  - [Initial steps for all applications](#)
  - [Property and configuration files](#)
  - [Instructions specific to SWEET](#)
  - [Instructions specific to Online help](#)
  - [Instructions specific to Institutional Search \(optional\)](#)
- [Upgrade procedure](#)

Once you have an eagle-i repository to talk to (see [repository installation and administration guide](#)), installing the rest of the applications of the eagle-i suite is relatively straightforward. This guide will walk you through the configuration and installation of the following applications:

1. SWEET - Semantic Web Editing and Entry Tool
2. Online help
3. Institutional Search (optional, but useful if your institution will not be indexed by eagle-i's central search)

The eagle-i applications run in a Tomcat server. We assume Tomcat is installed and configured to support HTTPS, Tomcat configuration is out of scope for this installation guide. Our reference implementation uses Tomcat 7.

## Prerequisites

- Tomcat with the eagle-i repository installed  
Locate Tomcat's home directory (usually dictated by your OS) and set an environment variable `CATALINA_HOME`, for example:

```
CATALINA_HOME=/opt/tomcat
```

- An outgoing e-mail server (SMTP) **or** a Jira server\_\_ for processing user feedback.
- *Optional*: MySQL for search usage logging

## Installation Procedure

### Initial steps for all applications

1. **Create a few repository users**  
Log in as an administrator to your eagle-i repository, e.g. if your server is foo.bar.edu, the URL of the repository admin is: <https://foo.bar.edu/repository/admin>. Navigate to the **Manage User Accounts** page and create the following users:
  - a. an anonymous user with no roles, to be used by the SWEET backend
  - a. a sample user with Resource Navigator role (to collect data)
  - c. a sample user with Curator role (to curate and publish data)
2. **Create eagle-i application home and configuration directory, `$(EAGLE_I_HOME)`**  
Create a directory to place eagle-i application data and configuration files. You may want to reuse part of the path used when installing the eagle-i repository. For example, if you installed the repository in `/opt/eaglei/repo`,

```
mkdir /opt/eaglei/conf
```

3. **edit `catalina.properties`**  
Open the file `$(CATALINA_HOME)/conf/catalina.properties` in your favorite text editor.  
Add the eagle-i configuration directory to the common class loader. Note that `catalina.properties` should already have a `common.loader` definition, you only need to add the eagle-i configuration directory, for example:

```
common.loader=/opt/eaglei/conf,${catalina.base}/lib,...
```

Add the definition of the eagle-i home property, where the conf directory was created. This needs to be the full path, without using variables, for example:

```
org.eaglei.home=/opt/eaglei
```

## Property and configuration files

The following three files are necessary to configure the eagle-i applications:

- `eagle-i-apps.properties` - contains basic properties for all applications
- `eagle-i-apps-credentials.properties` - contains various back-end credentials (e.g. optional logging database and Jira feedback). As a good practice, this file should be placed in an access-restricted directory of your server
- `whoami.xml` - contains Institution-specific configuration

Download the samples from [the examples directory](#) and edit to reflect your environment, see [Configuration Property Guide - pre 2.0MS3.x](#). Place the three files in the configuration directory (defined in step 1 of the the **Initial Procedure for all Applications** section)

## Instructions specific to SWEET

1. Download the SWEET war file from our [Software download page](#) (choosing the version you need, usually you will want the latest release) and place in a temporary location, e.g. `/tmp`. Rename the war to `sweet.war` and place it in your Tomcat webapps directory:

```
mv /tmp/eagle-i-webapp-sweet-[version].war ${CATALINA_HOME}/webapps/sweet.war
```

2. Make sure the property `eaglei.datatools.repository.url` is set in `eagle-i-apps.properties`, to reflect the base address of your repository installation. Note that the URL must be an https URL, for example:

```
eaglei.datatools.repository.url=https://foo.bar.edu
```

3. Restart Tomcat
4. SWEET will be available at:

```
https://foo.bar.edu/sweet
```

5. Log in as one of the test users created as part of the **Initial Steps for all Applications** and explore the SWEET. You can invoke the user help from the link on the top right hand corner.

## Instructions specific to Online help

1. Download the online help war file from our [Software download page](#) (choosing the version you need, usually you will want the latest release) and place in a temporary location, e.g. `/tmp`. Rename the war to `help.war` and place it in your Tomcat webapps directory:

```
mv /tmp/eagle-i-webapp-help-[version].war ${CATALINA_HOME}/webapps/help.war
```

2. Restart Tomcat
3. The online help browser will be available at:

```
https://foo.bar.edu/help
```

The online help is also linked from the SWEET and institutional search menus (top right corner menu)

## Instructions specific to Institutional Search (optional)

1. Download the Institutional search war file from our [Software download page](#) (choosing the version you need, usually you will want the latest release) and place in a temporary location, e.g. `/tmp`. Rename the war to `institution.war` and place it in your Tomcat webapps directory:

```
mv /tmp/eagle-i-webapp-institution-[version].war ${CATALINA_HOME}/webapps/institution.war
```

2. Make sure the files `eagle-i-apps.properties` and `whoami.xml` reflect your institution's configuration
3. **Optional:** set up a database for logging search activity
  - a. Create a database named `searchlogdb` (refer to the MySQL manual)
  - b. Uncomment the asynchronous logging properties in `eagle-i-apps.properties` and `eagle-i-apps-credentials.properties` and edit the latter to reflect your database credentials
4. Restart Tomcat
5. Institutional search will be available at:

```
https://foo.bar.edu/insitution
```

6. Log in as one of the test users created in the **Initial Steps for all Applications** and explore the search application.

## Upgrade procedure

To upgrade the SWEET, online help, and institutional search applications, follow these simple steps:

1. Stop Tomcat.
2. Delete the wars from `${CATALINA_HOME}/webapps`:

```
cd ${CATALINA_HOME}/webapps
rm -rf sweet* help* institution*
```

3. Download the desired release of the application wars and copy into `${CATALINA_HOME}/webapps`, as described in the installation sections above.
4. Refer to the release notes for possible property files changes (this is uncommon)
5. Start Tomcat.
6. Navigate to the application URLs and verify the updated release number in the footer.