nesstar

Unlocking | **data** | creating | **knowledge**

Getting Started Guide
Version 3.5 (sp1)

February 2008

Contents

1   Installation

1.1 Hardware/Software Requirements:

- Windows XP, 2000 or NT4.
- Windows Server 2003

All Service Pack updates should be installed. (If you experience problems with the installation under NT4, check that the video drivers are up to date).

- A graphics card.

- 1GB of RAM (more is preferable)

- 1 GHz CPU or better. A biprocessor machine can be useful, especially during upgrading when the new and the old server might be running side-by-side.

Accessing WebView requires a web browser which is set to accept cookies and is JavaScript enabled. Security and privacy settings should be set to accommodate this requirement.

IIS (Internet Information Server) versions 5 or 6:
To install a Nesstar Server on a secondary IP address, please refer to the Nesstar document on socket pooling.

1.2 Installing a new server:
The Nesstar Server executable is the only installation file that is required. Once you have downloaded the file you can proceed with the installation.

1. Double click on the installation file [**Nesstar-Server-v3.50.exe**] and wait for the installation procedure to begin.

2. Select the Language with which you wish to continue the installation [default is English].

3. Accept the Licence Agreement to proceed. Click 'Cancel' to terminate the installation procedure.

4. Specify a directory in which to install the server. The default is C:\Nesstar-Server-3.50.

5. To install to an alternative location click 'Browse' and select the desired folder. Click 'Next'.

6. Choose whether to 'Create shortcuts' for the Nesstar Server. 'Create shortcuts' adds '**Configure**', '**Start**', '**Stop**', and '**Uninstall**' icons to the Start Menu and the Nesstar Server directory and is highly recommended. If you do not wish to install shortcuts of any type, uncheck the box. Click 'Next'.

7. Select whether to add a start menu folder or not. Modify the name if required. Click Next.

The installation proceeds until the required files are copied to the appropriate directory. The final step is to configure your Nesstar Server by using the Configuration Tool that will launch automatically. Please go to Section 2 for further information on the use of the Configuration Tool and to complete the installation process.

1.3 Upgrading an existing server:

The Nesstar Server executable is the only installation file that is required. Once you have downloaded the file you can proceed with upgrading your current installation.

Install the new version as in section 1.2 above - noting the following points:

1. If the new version is to be installed on the same machine as the current 'live' system, but on a different port, e.g. 81, then the '**Migration**' tool can be used to migrate the existing resources and customised headings etc. to the new server. See section 2.5 for further information.

    Once the migration of information is complete and the new service is running, the old Nesstar server can be stopped. The port used by the new Server can then be changed to the one to be used for the 'live' system and 'Apply settings' used to make the change.

2. If the new version is to be installed on a different machine, a **Customised Bundle** can be created from the exsiting Server. Once the new Server is running, the customised bundle can be added. See section 2.6 for further information.

    Note: There are particular issues relating to the creation of a customised bundle on a Version 3.0 Server for installation onto a Version 3.5 Server. Further refer to the 'warning' notes in section 2.6.

Once the new Nesstar service is running satisfactorily, the old version can be uninstalled. Please keep a copy of the 'Data' directory in case you later encounter problems with your new Server.

1.4 Installing a Service Pack or Server Update file

If small changes are required to a Nesstar Server you may be sent a Service Pack or a Server Update file.

To install:

- Start the Configuration Tool using the 'Configure' shortcut available from the Start menu or your Nesstar Server's main folder.

- Open **Customisation | Install Customisation Bundle** and select the Service Pack or Update file required. Click 'Open' to automatically install the file and restart the Server.

1.5 Enabling SSL (Secure Socket Layer)

The default installation provides only a non-secure connection between the client and server. If you wish to provide a secure encrypted communication route (**https**), you must enable the secure sockets protocol.

Nesstar comes with a self-signed certificate out of the box. This certificate will enable users to communicate with the server over an encrypted connection. To enable this set the 'Secure Sockets' option in the configuration tool to 'true'. Setting 'Open Sockets' to 'false' will enforce an encrypted connection. Leaving both open will allow the user to choose.

Note that the certification shipped by Nesstar is not signed by a known Certificate Authority (CA). This will therefore cause web browsers to prompt the user to accept the certificate.

Using this certificate will also require anyone who wants to use the Nesstar Publisher to publish data to the secure Nesstar Server, to import the certificate into their Publisher's keystore. To do this, the file named 'nesstar.cer' has to be copied from the Nesstar Server's 'config' directory to where the Publisher is installed, and then to run the 'importcert.bat' script, that is shipped with Nesstar Publisher. Please refer to the Publisher User Guide for further information.

If you want to use a certificate signed by a proper Certification Authority (CA) instead, you will need to contact a CA to sign a certificate for you. When you have received a signed certificate, you can install it into the Nesstar Server's keystore using the instructions below. The publisher will already accept certificates that are signed by the common CAs.

To install a signed certificate:

1. Start cmd.com in Windows by typing cmd.com into the run dialog box in the Start menu, or a shell in Unix/Linux.

2. Change directory to where the Nesstar Server is installed.

3. Change to the 'config' directory.

4. Delete the old, self signed certificate as follows:

    In Windows, type in these two lines:
       del nesstar.cer
       ..\jre\bin\keytool.exe delete -v -noprompt -trustcacerts -alias nesstar
    -keypass changeit -keystore .keystore -storepass changeit

    In Unix/Linux, type in these two lines:
       rm nesstar.cer
       $JAVA_HOME/bin/keytool delete -v -noprompt -trustcacerts -alias nesstar
    -keypass changeit -keystore .keystore -storepass changeit

5. Copy your signed certificate into this directory. Make sure it is called nesstar.cer

6. Check that the certificate is in the right format as follows:

In Windows, type:
    ..\jre\bin\keytool.exe -printcert -file nesstar.cer

In Unix/Linux, type:
    $JAVA_HOME/bin/keytool -printcert -file nesstar.cer

This should give you some information about the certificate. If not, the certificate is either corrupt, or in the wrong format. If the certificate is in the wrong format (typically .pem format), you will need to convert it. OpenSSL provides free tools to do this for most platforms (http://www.openssl.org/).

7. Having confirmed that the certificate is in order, you will need to import it into the keystore:

In Windows, type:
    ..\jre\bin\keytool.exe import -v -noprompt -trustcacerts -alias nesstar
-file nesstar.cer -keypass changeit -keystore .keystore -storepass changeit

In Unix/Linux, type:
    $JAVA_HOME/bin/keytool import -v -noprompt -trustcacerts -alias nesstar
-file nesstar.cer -keypass changeit -keystore .keystore -storepass changeit

2   Configuration

The configuration tool enables Server settings to be entered which affect the way the Server is installed.

The configuration tool will be launched automatically during the installation process. When it appears you need to add some basic information, e.g. a Server name and an IP address, to enable your Server to be configured as required.

The 'Simple mode' contains the basic fields that need to be completed, but you are advised to review the 'Advanced Mode' and 'WebView settings' options as these contain additional fields that you may wish to use.

Most of these settings can be changed after installation by using the **File | Save Settings** option, but some will require you to use 'Apply Settings'. The **Edit | Undo Settings** will enable you to undo any changes in the configuration tool fields as long as any new entries have not been saved, and **Edit | Reset Settings** will enable you to restore the default settings.

When you have entered information into all the fields you require, click '**Apply Settings**' to complete the installation of your Nesstar Server.

Once a Nesstar Server is installed, the configuration tool can be opened using the 'Configure' shortcut available from the Start menu or your Server's main folder, or by selecting 'configure.bat' from the Nesstar Server's '**\bin**' directory.

2.1 Server Configuration - Simple mode

Once the Configuration Tool appears on the screen, you need to provide some information into the available fields to complete the installation process.

The '**simple**' configuration mode enables the basic settings to be entered, or changed, to the items listed below.

Simple server settings:

Licence Code
> Enter the licence key supplied by your Nesstar supplier. In order to change your code in future, you may need to switch to 'Advanced Mode'.

Server Name
> Enter a name for the Nesstar Server in this field. (Please note that the Server name cannot contain spaces). This name will identify the Server to external users and is also used as the name for the default catalogue in which datasets are published.
>
> **Note:** the Server name can be set up only once using the Configuration Tool. Please ensure, therefore, that the desired name is assigned to the Server before installation is complete. The name of the default catalogue can be changed within the Nesstar Publisher.

HTTP Port
> This is the port connection on which the Nesstar Server accepts connections. By default the port is set to 80 but this may be changed if it is already in use. For remote publishing, port 80 is recommended to maximise access from organisations with restrictive firewalls.

IP address
> This is the machine IP (or symbolic) address on which your Nesstar Server will accept connections. When you use the Nesstar WebView client you can view the published items on your Server by entering the IP address and port number in your web browser. It is preferable to enter the complete symbolic address of the server machine (e.g. hostname.domain.co.uk) rather than a numeric IP address.
> If you wish to run the Server as a local server, not to be accessed by other machines, use the default local address **localhost** or **127.0.0.1**.

Administrator Name
> This field displays the administrator user name 'admin'. The user name admin will be your user id when administering any Nesstar services.

Administrator Password
> Specify a password of your choice. This is the password used with the server administrator user id and will be needed to access any of the functions that require special permissions. Please note that the password must be at least 6 characters in length.

2.2 Server Configuration - Advanced mode

The 'Advanced mode' of the configuration tool contains additional settings for the Nesstar Server. Each setting is displayed with a short explanation. In most cases these do not need to be changed and are best left in their default modes. Some settings can only be activated if 'Apply Settings' is used.

Changing the configuration for Network Address Translation
You can configure your server to accept HTTP connections on a different IP address (and/or port) from the local machine address (and/or port). This type of set-up is usually referred to as 'Network Address Translation' or NAT for short.

To enable NAT you need to specify the **Pattern IP Address** that maps incoming addresses to the internal (bind) IP address. You do not need to change the bind IP or bind port, only the external IP and external port that are displayed under 'Simple mode'. To disable NAT simply change the **Pattern IP Address** value back to **localhost**. When disabled the internal IP and port are automatically synchronised to their respective external values.

2.3 WebView Settings

Click on the **WebView settings** button in the Configuration Tool to edit the WebView properties. The following settings are available in order to allow you to customise the WebView client.

Browse list – Metadata settings

- Display metadata in the treeview.

  By default set to true. If set to false then no metadata section will be available for studies or cubes in the browse list.

- Display Document Description.

  Set to true to display the Document Description section of the DDI.

- Display File Description.

  Set to true to display the File Description of the metadata.

- Allow HTML in metadata.

  Set to true if you want to allow HTML in the metadata.
  Note: if this option is set to 'true' appropriate html tags need to be included in the metadata text fields. If this property is set to false, the html in the metadata will not be translated and the text will appear as entered into the relevant fields.

Browse list – Options

- Use a variable description node.

  Set to true in order to display a Variable Description node in the browse list.

- Filter empty catalogues.

  Set to true if you want to filter empty catalogues, i.e. only catalogues that contain data will be visible in the browse list. The default catalogue is always displayed whether empty or not.

- Open first level in treeview.

  Set to true if you want to open up the first level in the browse list by default.

- Number of days marked new.

  An icon with the word 'new' will be displayed next to the datasets published within the specified amount of days.

Help Pages

These can be found in the following Nesstar Server directory: Nesstar-Server-3.50/jboss/server/default/deploy/webview.war/help/

- The default help page [index.html]

  Use this to change the location of your default help page. The help page properties allow you to provide links to your own help pages if required.

Language

- The translation fallback language.

  This is the language that is used as the default if the system cannot resolve your specified language. More information about language files is available in section 4.2 of this guide.

- Use the request to determine language.

  Set this to true if you want to use the user's browser settings to select language. Fallback language is used if the requested language is not found.

Customisation

- Various graphing properties can be customized in reference to the following:

  - Set the background colour for graphs
  - Set if the graph can grow – set to true if the graph is allowed to grow with content
  - Set the width of the graph. If growth is allowed this is the minimum width
  - Set the height of the graph. If growth is allowed this is the minimum height

- Allow calculations and compute.

  Set to true to allow calculations and compute/recode.

- Enable Maps.

  Set this to true to enable maps in a dataset if available.

- Enable server side bookmarks.

  Set this to true to enable the server side bookmark option.

Search

- Various options related to searching are available:

    o Include search for Dublin Core/e-GMS – set this to true if you want to
      include search for Dublin Core and e-GMS resources
    o Include search for surveys
    o Include search for variables
    o Include search for cubes

Area Profiling

- Set this to true if you want area profiling enabled.
  Note: this is not yet implemented.

Change the header link

- Change the header link displayed in WebView. Do not change this if you are
  unsure what this is.
  Note: this is the file contained in the Nesstar Server directory:
  jboss/server/default/deploy/webview.war/static/

2.4 Starting and Stopping the Server
[Server -> Start | Restart | Stop]

Use the **Server** menu to Start, Restart or Stop the Nesstar Server. This provides a
single location from which to control the basic server functions.

Note: MySQL continues to run when the server is stopped. If the server is installed
as an NT Service, the Server and/or MySQL can be started and stopped via the
following Windows menu options:

- **Start | Settings | Control Panel | Services** for Windows NT

- **Start | Settings | Control Panel | Administrative Tools | Computer
  Management/Services and Applications** for Windows 2000/XP

- **Start | Administrative Tools | Services** for Windows XP

Please select **Help | Administrator Guide** for more information.

2.5 Migrating information from another Server
[Customisation | Migration Tool]

Warning: Please note that it is not possible to migrate customised access control policies from a Server version 3.0 (with or without the Service Pack sp1), as changes have been made to the Access Control Unit. However, it is possible to migrate users.

2.5.1   Migration Tool
Use the migration tool to import: **Data files**, **users,** the **access control policy** and **customized web pages** from a previous Nesstar Server to a new Server.

Both Servers need to be running on the same machine. When the old Server is not available, the migration facility is limited to migrating **data** only.

- Start the 'Migration tool' and "Select location of old Nesstar Server".

After selecting the Server a list of the data files and users present on the old Server, will be displayed. Check the different tabs and select the items you wish to migrate.

General:
- 'Nesstar Settings' refers to the settings displayed in advanced mode.
- 'Copy Language Files' will ensure that any edited or additional language files are migrated to the new Server.

Datafiles: Enables 'All' or selected datasets to be migrated to the new Server.

Structure: 'Catalog structure' refers to the old browse list and the objects that it contains (for example, studies, cubes or resources).

> **Note:** The structure is the last element of the browse list to be migrated. This may take some time and will not appear on the new Server until all datasets have been deployed.

ACU: refers to the Access Control Unit, and the access control policies, users and projects contained within it.

> **Note**: If migrating from Nesstar version 3.0 to a more recent version, e.g. 3.5, and you select the 'Copy ACU settings' option, only 'Users' will be migrated to the new server. Any customised ACU policies will be ignored and not migrated due to changes made to the ACU.

Webpages: refers to either customised pages created using the Configuration Tool (menu item **Customisation | Customise**) or added to Server's 'root.war' directory (Nesstar-Server-3.50/joss/server/default/deploy/root.war/).

Final: Check 'Remove services from old server' if you wish to shut down the old server after you migrate.

Execution: This shows the progress of the migration process.

To complete the process, click on '**Migrate'** and the data files will be copied to your new Server's data directory. **Users** will be imported to the Server database and **customised web pages** copied into the relevant Server web directory.

You will need to wait until your server has completed deployment of the data files before they become visible through your Nesstar client. You can watch the progress of the migration process from your Server welcome page.

2.6 Customisation Bundles
[Customisation -> Create Customisation Bundle]

You can use a customisation bundle to migrate data from one machine to another, as the migration tool only works locally and not over a network.

The Nesstar Server and WebView are products that allow for a great deal of customisation. The customisation bundle provides a way to store any information that has been added to, or created on, the server. Once you create a bundle you can then apply it to another Nesstar Server.

A bundle is a zip file that contains customisations and extensions.

2.6.1 Creating a Customisation Bundle
To create a customisation bundle select 'Create Customisation Bundle' from the Customization menu.

The following options are available:

- o Transfer my customised server webpages.
- o Transfer my customised webview pages.
- o Transfer my data files.
- o Transfer my tree structure.
- o Transfer my users.
- o Transfer my custom code, forms and policy.
- o Include my configuration settings.
- o No questions asked installation.
- o Overwrite existing bundle.

Check an item to transfer the selected file(s) into the customisation bundle directory **\Nesstar-Server\config\bundles**.

Warning: Do not check the option 'Transfer my customer code, forms and policy' if the bundle is to be added to a Version 3.5 Server and is being created on an earlier Server Version, e.g. 3.0.

2.6.2 Manual additions to the customization bundle
You can also add additional files directly into the '\config\bundles' directory before creating the bundle.

The final bundle zip file is called '**Nesstar-Update.zip**' and will be written to the Nesstar server directory **\config\bundles\.**

Note: If any checkbox labelled "Transfer" is not selected, this will not remove previously transferred files of that type from the bundles directory. You cannot 'undo' a customization bundle option.

2.6.3   Installing a Customisation Bundle
[Customisation -> Install Customisation Bundle]

Select '**Install Customisation Bundle**' from the Customisation menu. You will be prompted to select the bundle you wish to install.

Click 'Open' and the bundle will be transferred into your server **\config\updates** directory.

You can choose to '**apply settings**' immediately - in which case the bundle is immediately installed during the normal configuration sequence - or to postpone installation - in which case the bundle will be installed next time 'apply settings' is clicked (or **\bin\install.bat** executed).

2.6.4   Installing a Customisation Bundle into a Server Version 3.5
If you are installing a customisation bundle created on a Server version earlier than 3.50, e.g. 3.0, and it included the option 'Transfer my tree structure', you will need to do the following to migrate your tree structure to your new Server:

1. In the directory **\Nesstar server\config\instdata\data** rename the file 'import.rdf' to become 'structure.rdf'.

2. In the configuration tool press 'Apply settings' to install your catalogue structure.

 Warning: Do not attempt to install a customisation bundle into a Version 3.50 Server if it was created on an earlier version of the Server, e.g. 3.0, and included the option 'Transfer my customer code, forms and policy'.

2.7 Customising the Server and Nesstar WebView
Customization of the Server Welcome Page and the Nesstar WebView client is possible through the Configuration Tool.

*   Open the Configuration Tool and select **Help | Help** for instructions.

2.8 Adding Users
[Customisation | Security | User Management Tool]

The User Management Tool allows you to create and manage user accounts for the Nesstar Server.

- Enter the User Management tool through the **Customisation** menu and select **Security | User Management Tool.** A browser window will open to the appropriate page.

- Enter the administrator user id and password.

Full details on how to use the User Management Tool can be found on the web page itself.

Note: only administrators can access and update the accounts on the Server.

2.9 Tools
[Tools | XML View]

Your XML file needs to be valid and complete in order to deploy on the Server. If you did not use the Nesstar Publisher to produce your files please use the XML viewer to ensure that any XML files used are valid. The different parts of the DDI structure are present in different folders reflecting the various sections of the DDI. The Nesstar Publisher allows the XML to be edited by making the DDI fields visible along with the data contained within them.

2.10 Help

For more technical assistance, or information about any other aspects of the Server that are not covered in this document, please refer to the Administrator Guide available via the **Help** menu. If you need further help please contact Nesstar Support.

3   The Nesstar Publisher

The Nesstar Publisher is used to create, convert, document and publish datasets. With this program you control the structure of the metadata within internationally recognised data documentation schema. Metadata includes the insertion of web links and URLs that appear within the Nesstar web client. The publisher provides the ability to process a wide variety of file formats, such as SPSS and Stata.

3.1 Installing Nesstar Publisher

To install Nesstar Publisher, double click the installation (.exe) file, provided by your Nesstar supplier, and the installation process will begin. Once installed a licence key must be entered to activate the Publisher, and your Nesstar supplier will provide this. You will be prompted to enter the licence key when the Publisher is first opened, and again when the key is about to expire.

3.1.1   Important information: Proxy and ISA servers

If you are using a proxy server or have a firewall installed you may experience problems when trying to connect to your Nesstar Server.

Proxy Server: If you are using a proxy server please go to **File | Preferences** and enter the required information.

ISA server: If you are using an ISA server then you will need to reconfigure it to allow the Publisher through. The following article provides useful information relating to this issue: http://support.microsoft.com/?kbid=295667

3.2 Importing a dataset

If you have your own data you can begin to use the Publisher by importing your datasets.

Please note that when importing files from a remote file system, files may become corrupt or errors may be reported by Publisher. We therefore recommend that files are used locally and then copied to the relevant storage area when complete.

To import a dataset:

1. Open the Publisher.

2. Go to **File | Import Dataset**.

3. Select the data file and the appropriate file type.

Make sure that in the **'Import Dataset'** dialogue box, the '**Files of type**' field is set to the appropriate file type. For example, if the file you want to import is an SPSS '.por' file the setting should be for SPSS Portable (.por).
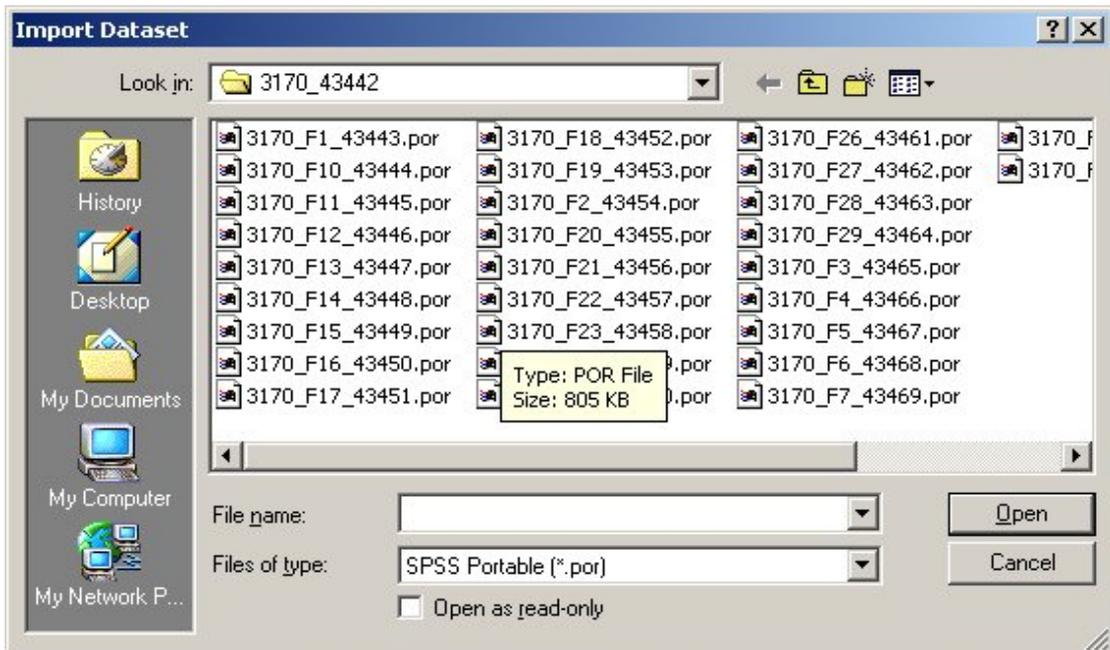
4. The dataset will open in the Publisher but will not be saved until you specify a location and choose to save.

5. The majority of the fields within the DDI are supported but not all of these fields are available by default – to add or remove DDI fields open the **Template Manager** and select '**edit**'.

6. Choose which fields to retain or remove in the template [these are listed on the left side of the window].

7. For more information on how to use templates please refer to the Publisher User Guide.

3.3 Importing an XML file – metadata

1. Select **Documentation | Import from DDI**.
2. Choose which fields to import from the dialogue box.

3.4 Publishing Data and Metadata

To be able to publish data and/or metadata you need to **Add a server** in the following way:

1. From the top menu – choose **Publishing | Add server**.

   - To add a local server (use this option to add a server installed on your own machine or to add a remote server accessed through a LAN):

     o Select '**Server on local network**'.

     o Click on the button marked '…'.

     o Browse for the location of the server.

   - To add a server on the internet:

     o Select '**Server on Internet**'.

     o Enter the URL of the Server with the port number on which it is running, e.g., http://nesstar.essex.ac.uk:80.

2. Enter a username, with administrator or publisher rights, and the password.
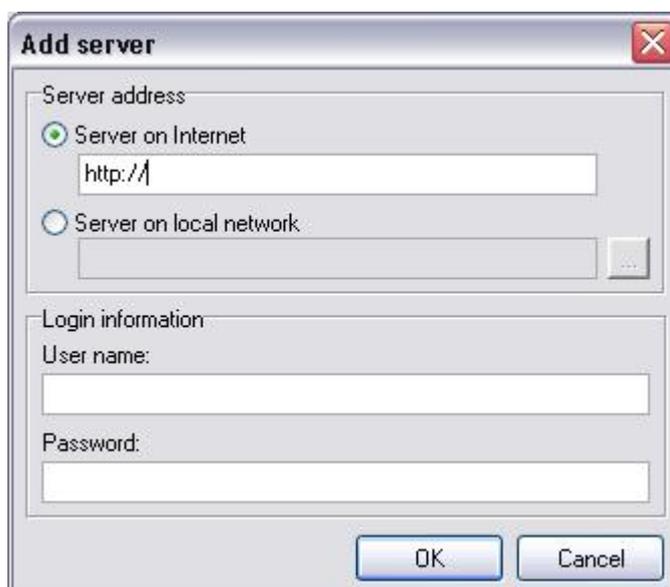
3. Click 'OK'.

The server will then appear in your list of servers in the Publisher.

To Publish:

1. From the top menu go to **Publishing | [Server Name]**.
2. Select to either:
   a. '**Publish data and metadata**'
   b. '**Publish metadata only**', or
   c. '**Republish**'.
3. Choose a catalogue in which to publish the study.
4. Select '**Publish**'.

Note: the user must have administrator or publisher rights to execute these functions.

To create new catalogues on a Nesstar Server:

1. Open 'Manage Server' by selecting **Publishing | [Server Name] | Manage Server**.
2. Click on the plus (**+**) button to add a new catalogue.
3. Give the new catalogue a name.
4. Change the order in which catalogues are organised by selecting a catalogue and using the up and down arrow buttons.
5. Click on the minus button (**-**) to remove a catalogue.

To publish to a hidden catalogue:
Datasets can be published to a catalogue that is not displayed in the WebView client. Cubes and datasets can be published to a hidden catalogue and reviewed before being made public.

1. To view the contents of this catalogue, click on 'Hidden Objects' and then 'Open object in Web Client' by clicking on the icon.
2. The hidden catalogue will then open in the selected web client. Default is WebView.
3. To share this catalogue with others send them the hidden catalogue's URL, which you will find once it has opened in the selected web client.

4   Useful Information

4.1 Federated Servers

The WebView client can be configured to display catalogues and data from more than one Nesstar Server. Any published resources on the linked Servers will then be available to use and analyse as if they were on the local Server.

Nesstar Servers that are linked together must be available to all users who require access to them, as those hidden behind firewalls may not be available to your intended audience.

Note: To access or publish data using Nesstar Publisher will still require a connection to the original Nesstar Server.

4.1.1   To add a link
[Nesstar-Server-v3.50]/config/instdata/config/localdb.rdf

Information needs to be added to the 'localdb.rdf' files located in the following directories:
- [Nesstar-server]/config/
- [Nesstar-server]/config/instdata/config/

Changes made to the version contained in the **/config/instdata/config/** directory, will not be overwritten by any subsequent 'Apply settings' commands.

To add a link to another Nesstar Server, edit the file 'localdb.rdf' using a text editor and then add the following information before the closing rdf tag (</rdf>):

```
<c:Server rdf:about="http://ip-address:port/obj/cServer/ServerName">
<rdfs:label>Enter label here</rdfs:label>
<rdfs:comment>Enter comment here</rdfs:comment>
</c:Server>
```

Note: The Server URI entered here is the one found in the object browser.

For example:
To add a link to the Nesstar 'Demo' server add the following:

```
<c:Server rdf:about="http://nesstar.essex.ac.uk/obj/cServer/Demo">
<rdfs:label>Demo server</rdfs:label>
<rdfs:comment>The Nesstar Demo Server.</rdfs:comment>
</c:Server>
```

From the '**Configuration tool'** click '**Apply Settings**' to activate the changes.

4.2 Language Selection
 [Customisation -> Languages]

More information is available from the help documents that are provided with your server: **http://[your-nesstar-server]/nesstar/docs/config_guide.jsp#language**

The text that is used by the Nesstar Server and WebView client is taken from four language files found in the following locations:

\config\languages\common
- messages_en.properties (contains mostly client api error message)

\config\languages\server
- messages_en.properties (contains words only generated in the server api and local tools. This can be anything from an error message in the 'stat' engine to a label in the configuration tool. For example, 'Analysis failed: table limit exceeded'.

\jboss\server\default\deploy\webview.war\WEB-INF\classes\nesstar\webclient\translation
- messages_en.properties (contains WebView words for the various parts of WebView including error messages and on-screen instructions, 'Add to row' for example. This also includes e-GMS tag names.

\jboss\server\default\deploy\webview.war\WEB-INF\classes\nesstar\webclient\translation\ddi
- alias_en.properties (contains the DDI tag names and the name displayed within WebView. For example, 'stdydscr' is displayed as 'Study Description'.

4.2.1 To customise an existing language file

To change the text, including error messages, you can use the language editor from the Configuration Tool by selecting **Languages** from the **Customisation** menu.

To customise an existing language file select one of the files mentioned above, from the tree in the left side frame. The contents of the chosen file will then be displayed in the right side frame.

To change the text, type into the panel on the right.

Click **Save** when you have finished or **Undo** to set the text back to the last saved version.

4.2.2 To create a new language pack

To enable your system to use a different language you need to create a new language pack. To do this you need to provide your own language properties files containing the translated text.

In order to do this you must create new properties files and name them appropriately in line with the existing files. The '.properties' file must be encoded in **ISO-8859-1** (also known as Latin 1) so ensure that any new files contain the correct encoding information.

Note: If you are supplied with a '.ansi' file this must be encoded in the native encoding of the country, e.g. **cp1252** under Windows in the United Kingdom.

Example: If the new language file is to contain French terms, you need to copy the English files and name them with the appropriate 'fr' extension as follows:

\config\languages\common
- messages_fr.properties

\config\languages\server
- messages_fr.properties

\jboss\server\default\deploy\webview.war\WEB-INF\classes\nesstar\webclient\translation
- messages_fr.properties

\jboss\server\default\deploy\webview.war\WEB-INF\classes\nesstar\webclient\translation\ddi

- alias_fr.properties

Please do not delete the '_en' properties files.

4.3 Access Control

Three access control policies are included with the server to aid customisation and usage

- Policy 1 enables a free server – no access control except for 'Administrator' controlled operations.
- Policy 2 restricts metadata access.
- Policy 3 restricts specified catalogs.

4.3.1 Preloaded policies

There are two ways to load a new access control policy on your server. The first is to use a command prompt in order to run the process as follows:

Using the Command-line tool:
- Open a command prompt
- Type the command "bin\compile_ext u1" - including the complete path to the server

Note: You need to specify 'u2' for policy 2 and 'u3' for policy 3.

The second method is to use the Access Control Policy Editor in order to load a policy from the menu.

Using the 'Access Control Policy Editor':
- Open the Server Configuration Tool
- Go to the **Customisation** menu
- Select **Security | Access Control Policy Editor**
- Go to the **Update** menu
- Choose a policy file ['predefined policy 1']
- Wait for the server to be restarted and updated.

The policy files can be found in the **/config** directory.

4.3.2 Policy 1 - Free Server

The free server modification removes most of the protection from the server. All operations and objects are freely available to any end user except for those operations that require 'Administrator' rights to perform.

4.3.3 Policy 2 - Protecting Metadata Objects

Datasets in the server are a combination of metadata and data files. Metadata refers to the description, on various levels, of the dataset. Data files are the actual statistical data used in the analysis process.

The default policy provides access control only on statistical operations which allows users to freely browse the metadata. This policy provides access control not just on the statistical content of your data, but also on their metadata.

This kind of policy can be loaded giving the commands:

- "bin\compile_ext u2" from the command console.

  Or

- Select **Preloaded Policy 2** from the *Update* menu using the Policy Editor.

The policy is defined in the file **config\2_policy.acu**.

This policy provides just a basic protection on metadata: it denies unauthorised users the browsing of full metadata description of the objects.

4.3.4   Policy 3 - Providing protection on catalogues

Studies are organised in the Nesstar server using catalogues (in the same way that files are organised using folders). '**Policy 3'** provides a way to restrict particular catalogues, and their contents, from access by unauthorised users.

The policy is defined in the file **config\3_policy.acu**. This policy needs to be edited to include the catalogue names that need to be restricted. Once the catalogue names have been added you need to load the policy.

This policy can be loaded with the following commands:

- "bin\compile_ext u3" from the command console.

  or

- Select the *'Preloaded Policy 3'* from the *Update* menu using the Policy Editor.

Please see the relevant Access Control documentation for examples and further explanation of how to use this policy **http://nesstar-server/nesstar/acu/index.html.**

4.4 Category Repository in Nesstar Publisher

Variables often contain the same categories across different datasets or even within the same dataset. The Nesstar Publisher provides repository functionality that enables the addition of variable categories to a variable repository (Global or Local). The categories that are stored in the Variable Repository can then be reused with other variables or studies.

4.4.1   To use the Variable Repository:

1. Open the Variable Repository **Documentation | Variable Repository**

   (Ctrl+R) or use the toolbar icon .

2. Click on '**Browse**' to view the contents of the Repository.
3. Click on **'Local Repository'** to add categories for your local use.
4. Click on **'Global Repository'** to add categories to a shared repository.
5. Use the icons [icon], [icon] and [icon] to add a group or a category set.
6. Use the right-hand window to add information for category groups or category sets.
7. Click on '**Use**' to add the categories to the active variable in the variables list.

Note: The Global Variable Repository will not be available until a location is specified under **File | Preferences**. If the location is shared over a network, other Publisher users will then be able to use the same variables and categories.

4.4.2   To add variables to the Local Variable Repository:
1. Ensure you are in the '**Variables**' tabbed section of the Publisher.

2. Highlight the variable you wish to add to the Variable Repository.

3. Go to the **Documentation** menu and choose '**Add to Local Variable Repository'** (Ctrl+Alt+L).

4.4.3   To search the Variable Repository
1. Click on 'Search' in the left frame.
2. Enter text into the 'Search Text' field and click on the 'Search' button.

Results are displayed in the left-hand window.

4.5 WebView Customisations

4.5.1   Copyright text – how to change what is currently available
To change the copyright information you need to edit the file copyright.jsp at the following location:

\jboss\server\default\deploy\webview.war\static

4.5.2   How to change the nesstar-support email address
You need to edit the copyright.html page in order to change the Support email address to one more suitable for your organisation. The file can be found at the following location:

\jboss\server\default\deploy\webview.war\static

4.5.3   How to edit the css files to change the look and feel of WebView.
The css files that control the look and feel of WebView are at the following location:

\jboss\server\default\deploy\webview.war\skins\default\css

Before you attempt any changes you need to retain a copy of the original files in case you need to restore the settings.

Nesstar support does not provide help in css customizations as part of standard maintenance agreements.

5   Frequently Asked Questions

5.1 Nesstar Server

Q. I am having problems installing my Nesstar Server. I keep getting the message that port 80 is in use but I know that the IP address I am using is not running any other services. What should I do?

A. If your machine is running IIS (Internet Information Server) versions 5 or 6, and you wish to install the Nesstar Server on one of its secondary IP addresses, please refer to the document about IIS and socket pooling, for details of the changes that need to be made to the IIS settings.

If you are not using IIS and are having this problem check the following:

Port 80 may be taken up by a different service. Check what programs are running to see if a different service is running on port 80.

5.2 Nesstar Publisher

Q. How do I add documentation such as '.pdf' or Word '.doc' files into the Publisher?

A. Place the documentation file in the Nesstar Server directory:

      c:\Nesstar-Server\jboss\server\default\deploy\root.war\

Then add a link to this file in the relevant URI field within the Publisher. Use the following format – **/filename**

Alternatively add the full URI to the file, for example:
http://222.255.255.43:80/document1.doc.

Q. How do I add links to the catalogue comments field within Manage Server so that they open in a new window and not in WebView's right frame?

A. HTML links should be added in the following format to ensure the linked web page or document opens in a new window: <a href="xxx" target="_blank">

For example:

UK Data Archive will open the UK Data Archive's home page in a new window when 'UK Data Archive' is selected.

Disclaimer:

While the University of Essex and the Norwegian Social Science Data Services (NSD) have taken all reasonable efforts to compile accurate documentation, we cannot accept liability for any loss or damage consequential or otherwise suffered by the client or any third party arising as a result of its use.