

aotearoa  
people's  
network  
kaharoa

**Kete Initial Configuration Guide for  
Technical Administrators  
February 2010**

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## **Introduction**

This guide takes you through the final steps required to get your Kete site running after the necessary software has been installed. It contains configuration steps you perform using the web interface the first time you start the site.

Once you have installed all the software and you have the correct entries in your apache configuration for the (virtual) host you'll be running, then you can start the web interface and configure your site. Most of the changes you make here are stored in the `system_settings` and several other tables in the database for Kete.

## The final stages of the setup

### Environment

These final stages of the setup run some commands natively on the server to change passwords and start and stop various services. To make sure that the setup can see these settings, you can try running the commands by hand as the user that you have made to run the ruby on rails sites. In this example I have a user called kete.

login: kete

password: \*\*\*\*\*

the command `htpasswd` needs to be run at one point. So, try running `htpasswd` from the command line

```
> htpasswd
```

Usage:

```
htpasswd [-cmdpsD] passwordfile username
```

```
htpasswd -b[cmdpsD] passwordfile username password
```

You should get a result back about the usage of this command. The zebra commands to start and stop and initialize the zebra database instances will also be run as part of the setup so make sure the user can execute

```
>zebrasrv --?
```

```
Usage: zebrasrv [ -a <pdufile> -v <loglevel> -l <logfile> -u <user> -c <config> -t <minutes> -k  
<kilobytes> -d <daemon> -p <pidfile> -C certfile -ziDST1 -m <time-format> -w <directory>  
<listener-addr>... ]
```

If you cannot run these commands then you'll need to add them to the path environment variable in your kete users profile. `htpasswd` is part of the apache install on your server. Depending on the flavour of operating system this could be in various directories. The zebra installation will depend on where you decided to put it when you installed it. The recommended

directories for this to be in is in /usr/bin, /usr/local/bin, or /opt/local/bin.

On solaris you may also need to change some settings in the /zebradb/zebrasrv-kill.sh file. These changes are to do with the fact that solaris has the bourne shell installed at /bin/sh whereas many linux servers have the bash shell installed as /bin/sh and also the command line options for ps on solaris are not the same as for ps on linux.

for solaris change the first line to

```
#!/bin/bash
```

and change the -ax on line 11 to -A

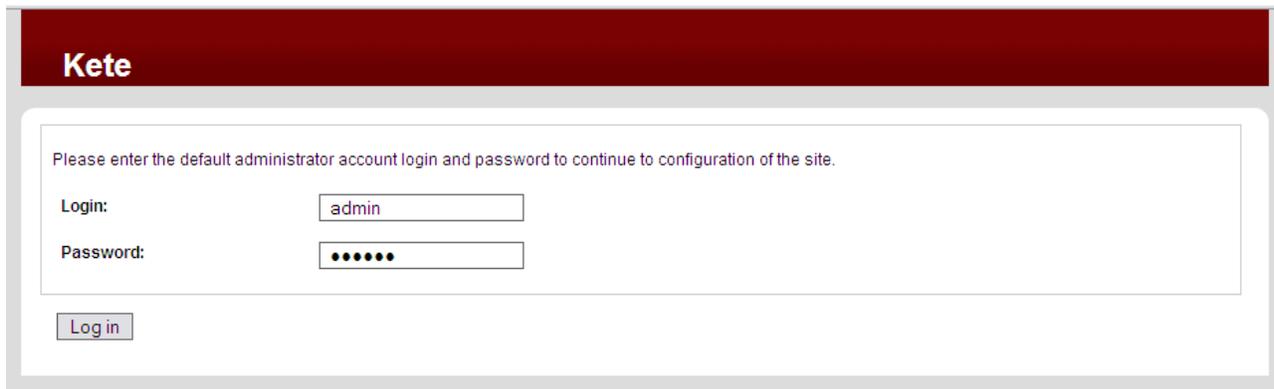
```
for child in $(ps -o pid,ppid -A | \
```

## Configuration

Once your happy that htpasswd and the zebra programs can be found type in the url of the site into your browser. for example

http://keteexample.example.net.nz

You should be presented with the page shown below. The first time you access the site it needs to load and compile modules so it may seem a bit sluggish.



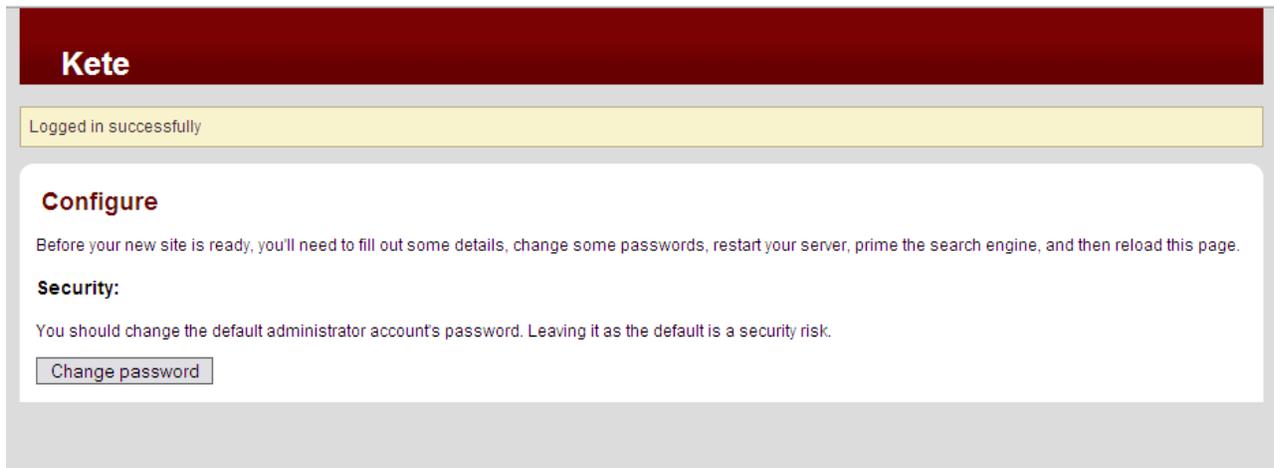
**Kete**

Please enter the default administrator account login and password to continue to configuration of the site.

Login:

Password:

The login field should be filled with admin and the default password you need to type into the password box is test. Then click on **Log in**. This will present you with the following screen.



**Kete**

Logged in successfully

**Configure**

Before your new site is ready, you'll need to fill out some details, change some passwords, restart your server, prime the search engine, and then reload this page.

**Security:**

You should change the default administrator account's password. Leaving it as the default is a security risk.

After reading the instructions on the screen click on **change password**

**Kete**

Wrong password

**Change password**

Old Password  
●●●●●●

Password  
●●●●●●●●

Confirm Password  
●●●●●●●●

Change password

Type in the old password of test and a new password that you'd like your techadmin to have. Please note that the password must be changed from test. If you leave it as test later configuration of the site will be effected as the administration configuration screens check the admin's password to determine if the site is fully configured. Click **change password** to continue.

This will display the Configure Page which incidentally is that same page as is displayed when you click on configure site from the administrators toolbox once your site is up and running. Right now we're simply getting the site up and running, configuring the settings and starting zebra and backgroundrb. We know we can come back and reconfigure ,so you shouldn't click on the Advanced options link right now.

Password changed

## Configure

Before your new site is ready, you'll need to fill out some details, change some passwords, restart your server, prime the search engine, and then reload this page.

### Settings

Click on section to fill out its settings. [Show Advanced Options](#)

[Server](#)

[System](#)

[Accounts](#)

[Warnings](#)

[Flagging](#)

[Results Display](#)

[Related Items Display](#)

[Extended Fields](#)

**Not yet complete.**

Click on the **Server** link to allow you to configure the name of the site, its url and some important email addresses for the site. Pretty site name shows at the top right of the screen as the name of your Kete and on emails.

Sitename is important to enter correctly as it will effect many of the configuration parameters such as file paths etc presented to the user.

The notifier email is where emails appear to come from when the site sends emails. Its important to make this a real email as users may try to reply email back to this address with questions or queries and also if emails are undeliveriable etc.

Contact email is the address of the person who'll take general queries about the site when the contact email address link is clicked on the site. It is also important this is a real person's address so that queries about the site can be dealt with. When you've completed this, click on **save**.

**Kete**

Password changed

**Configure**

Before your new site is ready, you'll need to fill out some details, change some passwords, restart your server, prime the search engine, and then reload this page.

**Settings**

Click on section to fill

- Server
- System
- Accounts
- Warnings
- Flagging
- Results Display
- Related Items Display
- Extended Fields

**Not yet complete.**

**Pretty Site Name:**  
  
This will appear on your site pages, outgoing emails, etc.

**Site Name:**  
  
The host name, for example 'kete.net.nz'.

**Notifier Email:**  
  
What email address should outgoing notifications, such as password reminders, from the site come from. For example: kete@kete.net.nz

**Contact Email:**  
  
What email address should be linked to in the 'Contact' link, normally on the top right bar of navigation on every page. For example: kete@kete.net.nz

Clicking the next link **System** will display a dialog about the maximum file size to upload. Depending on the usage of your kete, 50mb may not be enough. Determine a size and Click **save**.

**Kete**

Password changed

**Configure**

Before your new site is ready, you'll need to fill out some details, change some passwords, restart your server, prime the search engine, and then reload this page.

**Settings**

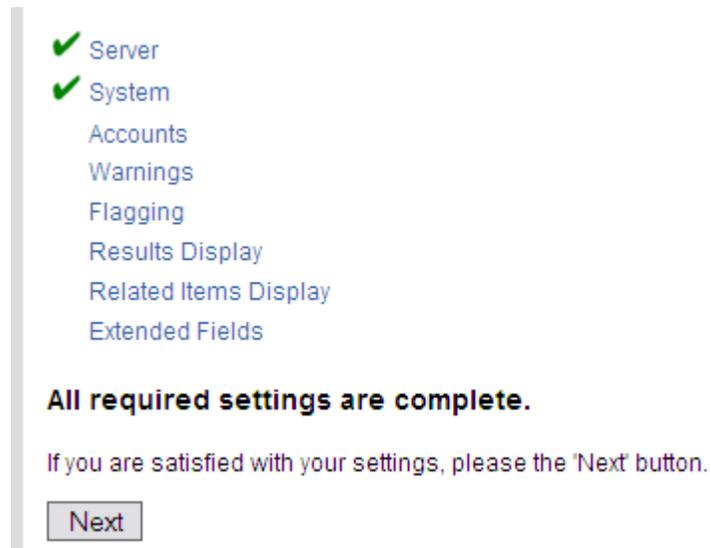
Click on section to fill out its settings. Show Advanced Options

- ✓ Server
- System
- Accounts
- Warnings
- Flagging
- Results Display
- Related Items Display
- Extended Fields

**Not yet complete.**

**Maximum Uploaded File Size:**  
  
We will only allow uploads of files up to this size.

When you clicked on **save** you'll go back to the previous dialog and you'll notice the "Not yet complete" wording at the bottom of the page now says "all required settings are complete". This is because you've completed setting the server and system options for the site, which is enough to have a basic working site. You could continue through the configuration by clicking on the **Next** button at this point, but I'd recommend that you finish the configuration with the accounts, warnings, flagging, results display, related items display and extended fields links first.



✓ Server  
✓ System  
Accounts  
Warnings  
Flagging  
Results Display  
Related Items Display  
Extended Fields

**All required settings are complete.**

If you are satisfied with your settings, please the 'Next' button.

Next

So click on **Accounts** to change the account settings.

Require activation is a good setting as it makes sure that the user who is trying to get an account has a valid email address and requires them to receive an email and activate it to use the Kete.

Captcha type is about the challenge given to the user when they try to join the site. Leaving it at all is a good option unless you are having difficulties with imagemagick and it doesn't work %100. Click on **save**.

**Kete**

Password changed

**Configure**

Before your new site is

**Settings**

Click on section to fill

- ✓ Server
- ✓ System
- Accounts
- Warnings
- Flagging
- Results Display
- Related Items Display
- Extended Fields

**All required settings are complete.**

If you are satisfied with your settings, please the 'Next' button.

Next

**Require Activation:**  
false

Does the newly signed up user have to confirm their email address before being fully registered?

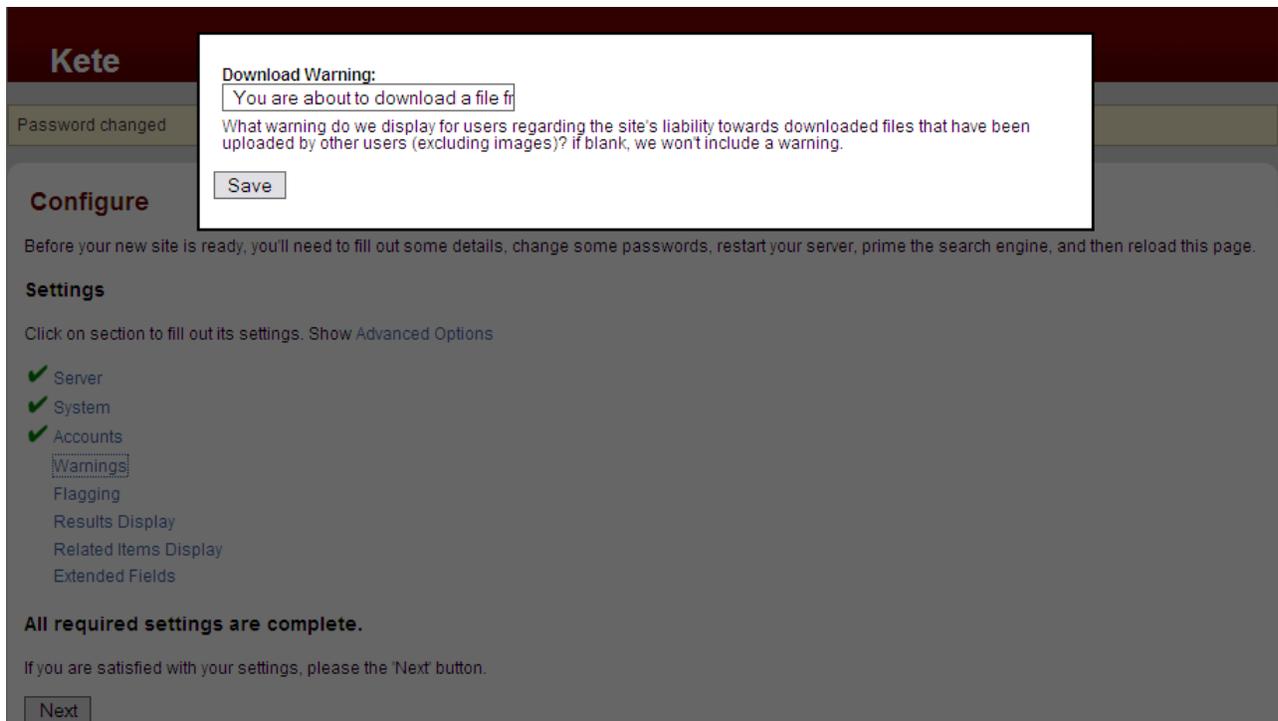
**Captcha Type:**  
all

Choose the type of spam protection method (known as 'captcha' see <http://en.wikipedia.org/wiki/Captcha>) used during user registration. The options are to use 'image' (which is inaccessible to blind users and requires Rmagick supporting software), 'question' (which currently has a bias towards english speakers, but doesn't require other software), or 'all' (which is will provide image first, but link to question captcha for accesability, in the future may include an 'audio' option). Note that you shouldn't include the single quotes around you choice.

Save

en reload this page.

The Warnings link takes you to the the warning that will be displayed to the users about downloading. It is safe to leave this as the default but you may want to change the wording to be more appropriate to your site or company's policy or ,you may want to remove it all together by making it blank. Click on **save** to continue.



The **Flagging** link allows you to adjust the defaults for flagging items. For initial installs the flagging tags can be left at the defaults. Once you understand flagging better you may find that you don't want or need them or, would prefer just one flag to put a items on the Kete into the moderation queue.

Default policy is full moderation makes the system setting for new baskets full moderation. If this is your first install I recommend you leave it as False.

Frequency of Moderation emails is set to a default of 4 hours. This has proven to be annoying to moderators so the recommended action is to change this to **instant** so it will send only one email for moderation. Setting it to 0 will mean that only basket admin's will be able to moderate items and they'll need to do passive check as there will be no notification of new items needing moderation.

**NOTE** that version 1.2 of Kete has issues with the moderation facility so **instant** is the only useable solution if you wish to use moderator users on your site.

**Kete**

Password changed

**Configure**

Before your new site is ready, you may want to adjust some of the default settings. When you are ready, click the 'Next' button. You can reload this page.

**Settings**

Click on section to fill out

- ✓ Server
- ✓ System
- ✓ Accounts
- ✓ Warnings
- Flagging**
- Results Display
- Related Items Display
- Extended Fields

**All required settings are complete.**

If you are satisfied with your settings, please the 'Next' button.

Next

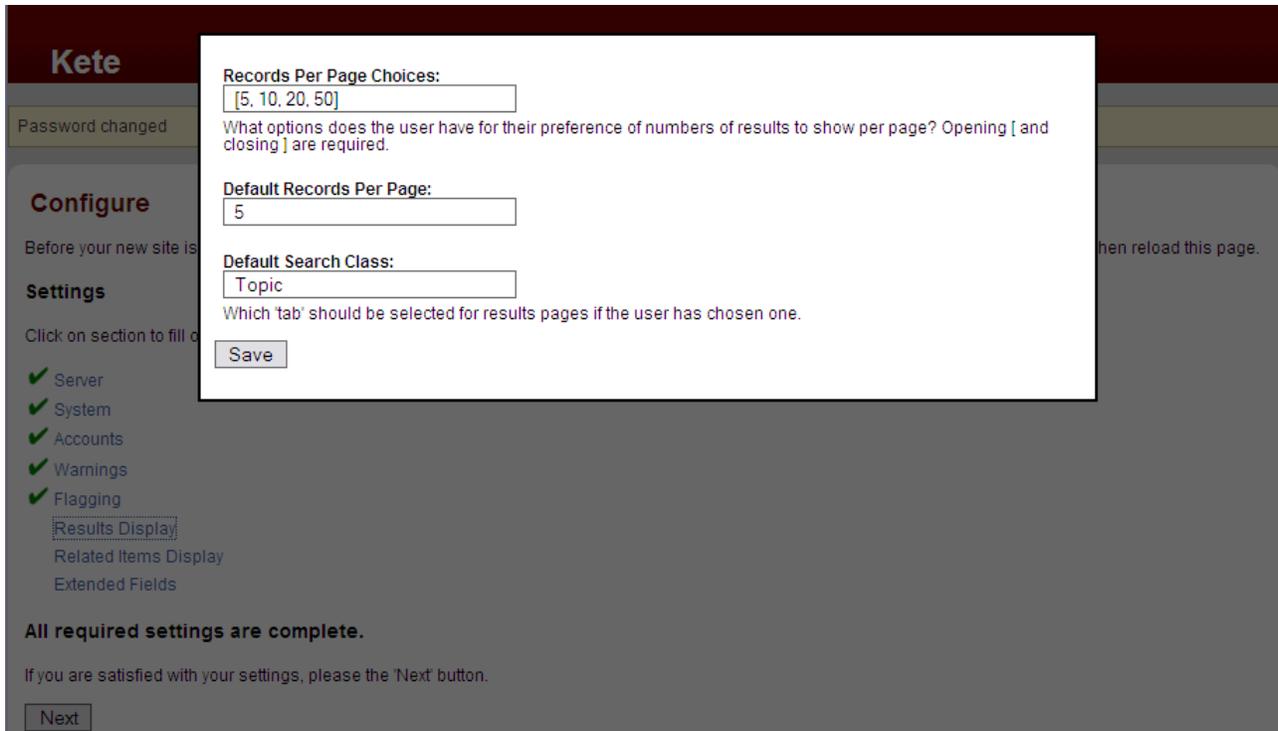
**Flagging Tags:**  
"/>  
What flags are available to users to flag items? Be careful to use single quotes and commas. Opening [ and closing ] are required. Just put [] to turn flagging off.

**Default Policy Is Full Moderation:**  
  
Should the default policy for all new baskets created on the site be full moderation? Full moderation means that all changes or additions must be reviewed by a moderator before going public.

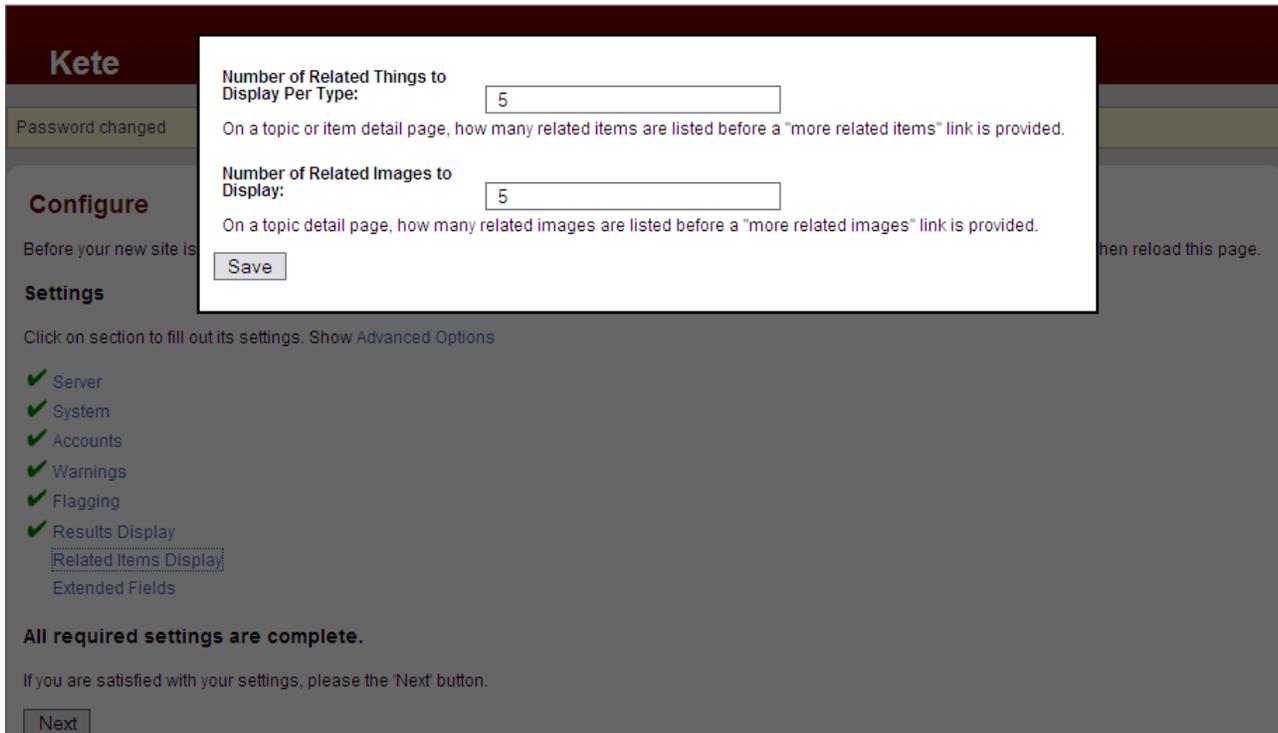
**Frequency of Moderation Email:**  
  
How often should the site email moderators when revisions need review? Accepted values are "instant" or a number specifying the number of hours between digest (lists all revisions needing moderation) emails. A value of "instant" will send an email to moderators right after the revision is submitted only. A value of 0 will never send moderators email. This is desirable if you use alternative method for tracking revisions needing moderation by subscribing to the RSS feed from the moderate area of a basket.

Save

The Results display link allows you to adjust the number of records shown on a page. The defaults are good unless you'd prefer to start with more than 5 records shown on a page. Google's default search results are 10, so a set of [10, 25, 50, 100] and default messages per page of 10 might make searching look more familiar.



Related items display determines how many related items are displayed in the secondary dialog box at the bottom of each item. The defaults are good for now but in future you may want to experiment with higher numbers. 10 for related items and 30 for images.



The last link on the configure page is about Extended fields. These settings can be left at the defaults.

The screenshot shows the Kete configuration interface. A modal dialog box is open, titled 'Extended Fields'. It contains the following fields and text:

- Default Number of Multiples:** A text input field containing the number '5'. Below it is the text: "If an extended field can have multiple values, how many input fields are added to form using the extended field?"
- Extended Field for User Name:** A text input field containing 'user\_name'. Below it is the text: "Allows for specifying an extended field to user registration forms for things like 'Full name' or 'Screen name', rather than just their 'login' which can't contain spaces. The notation here specifies the extended field's label in lower case with '\_' replacing spaces. If the extended field doesn't exist it won't be displayed."
- A **Save** button.

In the background, the configuration page shows a list of settings with green checkmarks: Server, System, Accounts, Warnings, Flagging, Results Display, and Related Items Display. The 'Extended Fields' link is highlighted. At the bottom, there is a 'Next' button and the text: "All required settings are complete. If you are satisfied with your settings, please the 'Next' button."

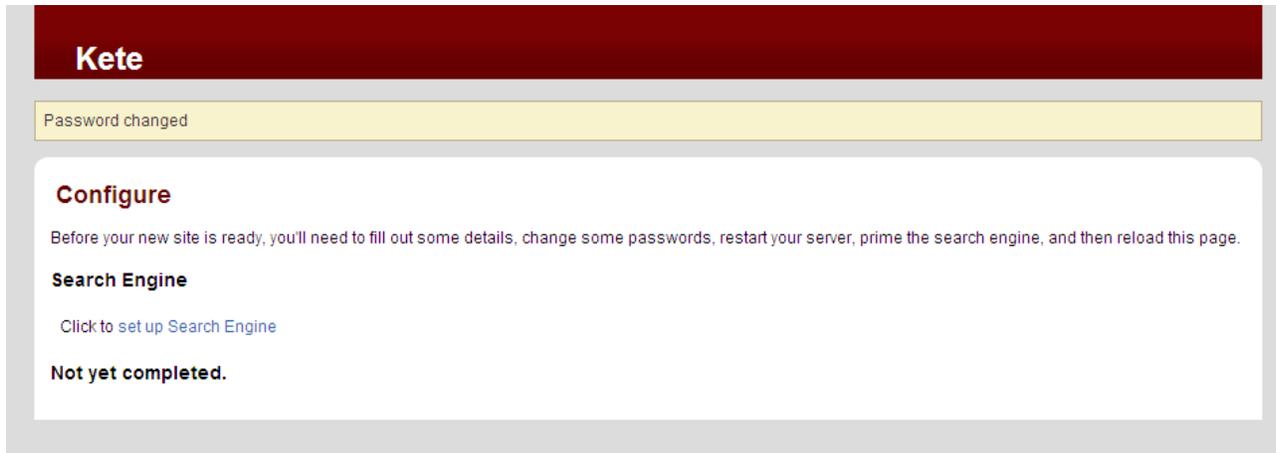
Finally the Next button at the bottom of the screen can be used to continue on to configuring the

The screenshot shows the 'Settings' section of the configuration page. It includes the following elements:

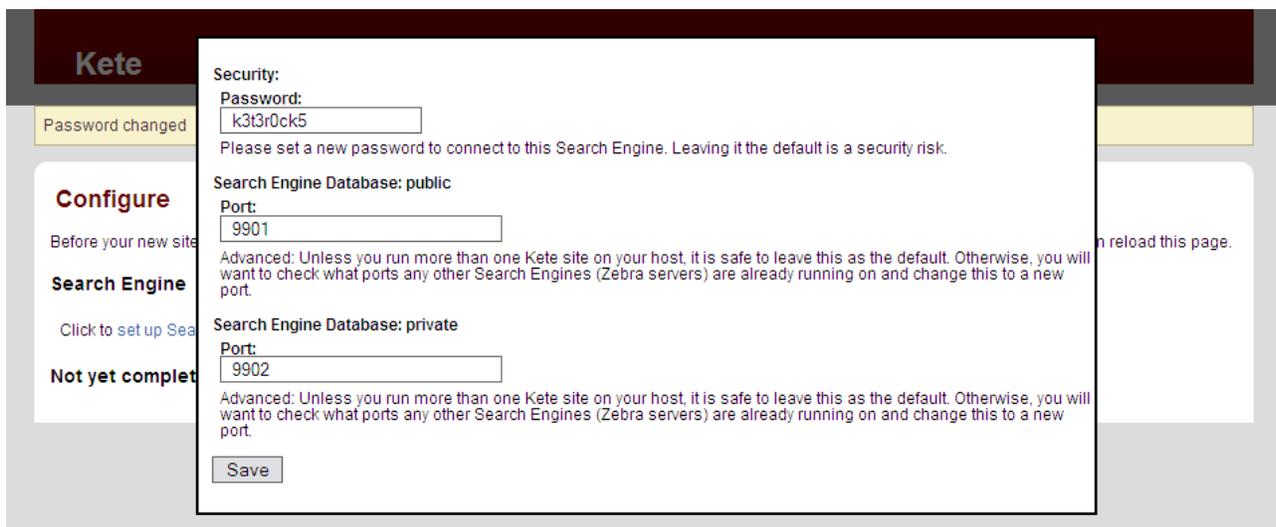
- Settings** header.
- Text: "Click on section to fill out its settings. Show [Advanced Options](#)".
- A list of settings, each with a green checkmark: Server, System, Accounts, Warnings, Flagging, Results Display, Related Items Display, and Extended Fields.
- All required settings are complete.**
- Text: "If you are satisfied with your settings, please the 'Next' button."
- A **Next** button.

The word "search engine" is partially visible at the bottom left of the page.

So click on the configure search engine link to get into configuration of the zebra search database.



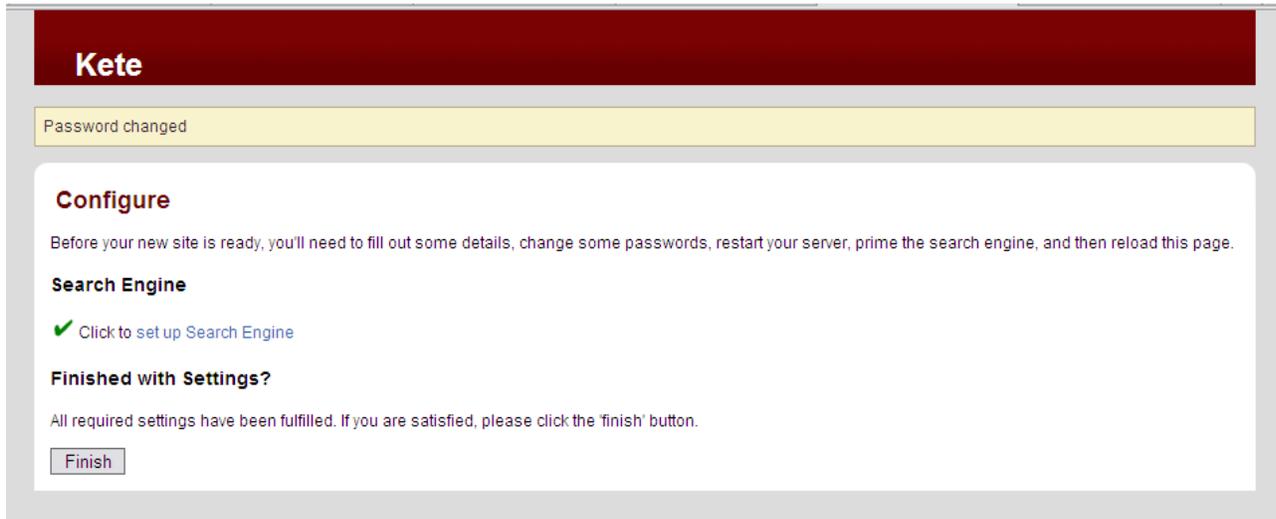
This dialog allows you to change the settings for the connection to the Zebra database that you installed on the server. If you are running zebra for some other reason or, you intend on installing more than one installation of Kete on the server, you'll want to make sure that the public and private ports are changed from the defaults. When you've completed this click on save.



When you click on save you may notice a small delay as records are written to the zoom\_dbs database table and several files are created and changed on the filesystem of your Kete. In

RAILS\_ROOT\zebradb\ the file keteaccess should have its contents changed to be kete:new\_password\_you\_just\_entered and in the RAILS\_ROOT\zebradb\conf directory a new xml file is created called kete-zebra-servers.xml.

Then click on the **Finish** button.



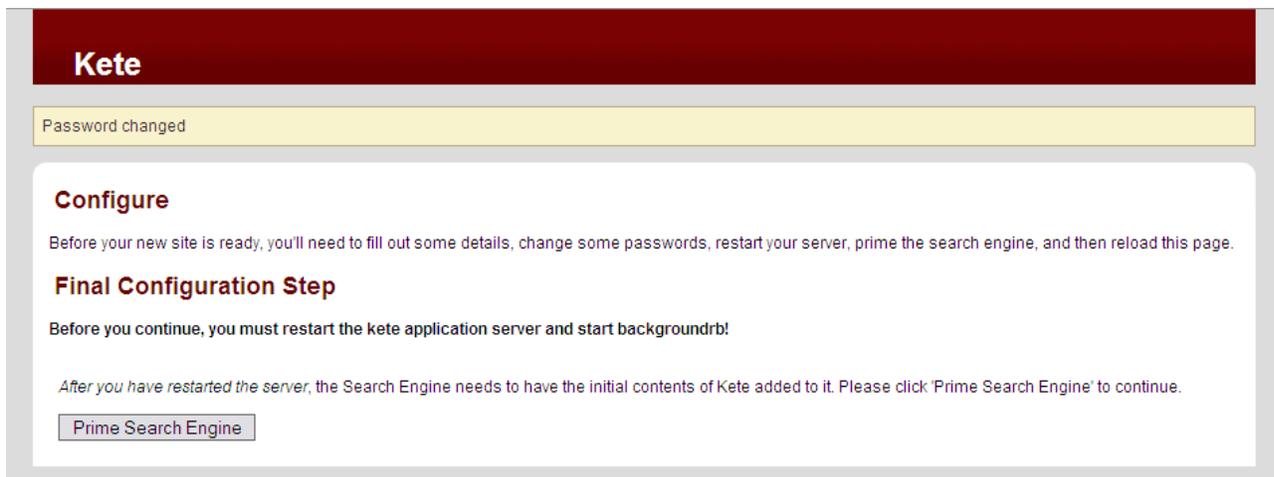
The screen presented next requests that you restart the kete site. If you are running with Passenger then as the kete user on your server go to the RAILS\_ROOT dir and type

```
touch tmp/restart.txt
```

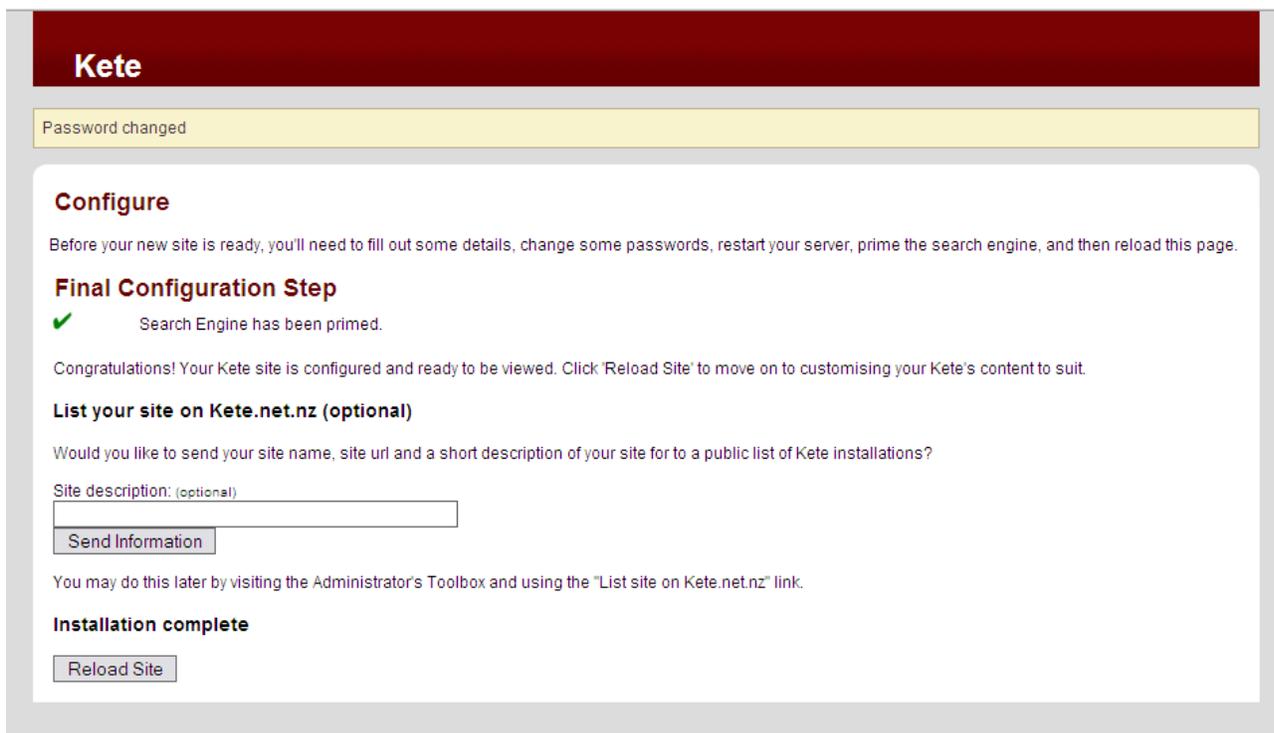
Note that this is tmp/restart.txt (which means \$RAILS\_ROOT/tmp/restart) not /tmp/restart.txt these are two different locations. This asks passenger to restart itself. This is done so the rails application can boot up with all the new settings that you've entered into the system\_settings database table. It also asks you to start backgroundrb from the RAILS\_ROOT directory using the command

```
script/backgroundrb start
```

Again there is no / on the front of this. Backgroundrb is required to run the background processing required for various tasks on the Kete. The most immediate one of these tasks is to prime the zebra index build that the Kete will do on the next. Once you've restarted the site and started backgroundrb click on Prime search engine.



You will see a spinning progress bar at the bottom of the screen as the install backgroundrb shutdowns and running copies of zebra search database for the Kete, initialises a new copy of the search databases for public and private and then finally indexes the content of the basic Kete. Once it has completed it will present this final screen.



Click on reload site and it will take you to the initial home page of the newly minted Kete. You'll see in the top right the Kete now has the name you gave it in the Configure screen Server

dialog. On the right under the search box you'll see your login name admin is displayed. If you click on this link it will allow you to change the Profile settings of the admin user.

The screenshot shows a web browser window displaying a Kete site. The header is dark red with the text "Kete Example" on the left and a search bar on the right. Below the header is a navigation bar with links: Home, Browse, About, Help, Contact, Add Item, Add basket. On the right side of the navigation bar, it says "admin v Logout".

The main content area has a heading "Welcome to Your New Kete Site". Below it is a paragraph: "Kete is a knowledge basket of topics, images, audio, video, web links, documents, and discussion which are collected and catalogued by the site's community." Another paragraph follows: "This is a good time to further customise it to suit your needs. Kete has lots of options which may seem daunting when you get started. Don't worry, you can customise a little or a lot. You can also easily change things later. Feel free to change your Kete incrementally."

There is a sub-heading "Edit Included 'About' and 'Help' to Suit Your New Site". Below it is a bolded paragraph: "VERY IMPORTANT: You will want to immediately review and edit the Terms and Conditions to fit your site. The included topic is just a starting point, please edit it to suit your needs. This is what users will have to agree to when registering. This topic has legal ramifications for your site. Make it a priority to review and update before your site is open for business!"

Three paragraphs follow, each starting with "The [About/Help] basket, in Kete terms a section of the site is called a basket, is meant to contain a description of your site and its policies. It comes with starter topics for both. We recommend that you give these a quick edit to reflect your needs." The first is for the About basket, the second for the Help basket, and the third states "The default topics were originally written by Kete Horowhenua. We owe them a great big thank you for them."

There is another sub-heading "Edit This Page". Below it is a paragraph: "Lastly you will want to edit this topic using the edit link (or you can replace it all together, see documentation)." Another paragraph follows: "Once you have edited this page you have covered the minimum necessary to get your Kete site ready for business. You can now start to add real content and begin exploring your site."

On the right side of the page, there are two grey boxes. The top one contains a list: "• You're a Site admin." and "• Members". The bottom one is titled "Contents by type" and contains a list: "• Topics ( 15 )", "• Images", "• Audio", "• Videos", "• Web Links ( 1 )", "• Documents", and "• Discussion".

## Admin Profile

The Profile page allows you to change the settings of the settings of the admin. Click on edit to change the settings

**Kete Example** Search:  Go

Home | Browse | About | Help | Contact | Add Item | Add basket admin | Logout

### Profile of admin [ edit | change password ]

**User name:** admin  
**Email:** admin@changeme.com  
**Created:** 13/01/2010 00:03

**Contributions**  
Items created by or contributed to by admin

**Baskets [ add basket ]**

- Site [ Members ]
- About [ Members ]
- Help [ Members ]
- Documentation [ Members ]

**Tools for basket: Site**

- basket preferences
- moderate basket contents
- basket members
- import content into basket

**Administrator's Toolbox**

Controls: [basket profiles](#) | [topic types](#) | [content types](#) | [extended fields](#) | [choices for extended fields](#) | [site members](#) | [administer licenses](#) | [List site on Kete.net.nz](#) | [reconfigure site](#) | [OAI PMH Sets](#) | [Z39.50 search databases](#) | [Rebuild search databases](#)

Support: [documentation](#)

[Accessibility](#) | [Sitemap](#) | [Back to Content](#)

You'll want to change the email address to be your own or an address for administration of the Kete. The username is also a good idea to change to something that looks more appropriate for the site. As the admin user is often used to bulk upload information to the Kete and each item in the Kete displays the creator and last updater sometimes its a good idea to change the username to be the same name as the Kete site or something that reflects the site as a whole rather than an individual admin user. For example the admin user of the Hurunui Library has the user name "Hurunui Library" so that all content that is uploaded and edited by this user has this name

**Kete Example** Search:

Home | Browse | About | Help | Contact | Add Item | Add basket admin  Logout

### Edit your details

**Login:**

Your username must be unique and contain no spaces. You will be asked for this and your password everytime you login. If your names is "John Smith" then you could use "jsmith" as your login.

**Email:**

**User Name:**

This is the name others will see on your profile and when you make contributions to the site. If you do not supply one, your login will be used instead. Your user name can contain spaces. E.g if your login was "jsmith" your screen name could be "John Smith".

**Allow Emails from other users:**

**Prefered License:**

Please see the [site terms and conditions](#) for information on how contributions are licensed.

- [Change Password](#)

As a final note that the Configuration page you worked your way through is available to Administrators as the "reconfigure site" link in the administrators toolbox at the bottom of the screen when they log in.