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# SMaRT AFIX for Independent Partners Installation Guide

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## **Support Services**

For general support on this product, contact your system administrator or help desk. For up-to-date documentation, visit the STC Documentation Portal at <https://documentation.stchome.com/>.

## **Additional Information**

This documentation describes the following: SMaRT AFIX installation for independent states.

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# SMaRT AFIX for Independent States Installation Instructions

The SMaRT AFIX for Independent States release was requested by the AFIX-IIS Integration Project Consortium and primarily enables Awardee testing to proceed in states with critical timelines and no integration with IWeb.

The following provides an overview of the process for installing the SMaRT AFIX application.

## Components

SMaRT AFIX is composed of several server components. The following includes their functions and brief technical descriptions.

### Standalone Forecaster (SAF)

SAF is a web application that evaluates patient and vaccination data to produce a vaccination forecast for that patient. It provides both a user interface and a SOAP web service. For SMaRT AFIX, only the web service is used.

SAF runs under Apache Tomcat 7.0 and is deployed as a `.war` file. It utilizes an Oracle Express Database (XE) to store pre-configured vaccination schedules and configuration data.

Standalone Forecaster is installed on the *Service* box.

### PostgreSQL

SMaRT AFIX utilizes PostgreSQL 9.4 as a database. An additional Postgres module, `pg_partman`, is required. The name of the database is `afixdb`. It is created via several `.sql` scripts. See [SMaRT AFIX Database Initialization - Linux](#) or [Windows](#) for the installation instructions.

### JasperReports Server (JRS)

JRS is a web application that provides the reports for SMaRT AFIX. These reports are imported into JRS via the JRS Management Console. See [SMaRT AFIX JasperReports Deployment - Linux](#) or [Windows](#) for installation instructions.

### Jaspersoft ETL (JETL)

Patient, vaccination, and provider data are batch-loaded into the SMaRT AFIX database on a nightly basis. Once this data has loaded, it is run through the Standalone Forecaster and aggregated into tables that are designed for reporting. These batch processes are scheduled and executed by Jaspersoft ETL.

## SMaRT AFIX Application

The UI and application server logic are provided via the SMaRT AFIX application. This is a Node.js application and uses Keycloak for user authentication.

### Keycloak

User authentication is provided by Keycloak. It is used by all STC Suite applications for Single Sign-On (SSO). Each application requires a client within Keycloak. The client contains references (URLs, ports, etc.) that are specific to each individual SMaRT AFIX application.

## New Application Installations

The following refers to new application installations, not necessarily to upgrade installations. The instructions differ between Linux and Windows installations as well. If you are building a new Linux Server, see the [Build a Linux \(CentOS\) Server](#) instructions.

**NOTE:** The SMaRT AFIX components should be installed in the order listed below.

Component	Server	Linux	Windows
Keycloak Installation	Service (SVC)	See either <i>Keycloak Installation Guide for STC-Hosted Clients</i> or <i>Keycloak Installation Guide for Self-Hosted Clients</i> .	
Standalone Forecaster	Service (SVC)	<a href="#">Forecaster Installation Instructions - Linux</a>	<a href="#">Forecaster Installation Instructions - Windows</a>
PostgreSQL Server (if not already installed)	Database and Batch (DBB)	<a href="#">Postgres Database Installation - Linux</a>	<a href="#">Postgres Database Installation - Windows</a>
SMaRT AFIX Database	Database and Batch (DBB)	<a href="#">SMaRT AFIX Database Initialization - Linux</a>	<a href="#">SMaRT AFIX Database Initialization - Windows</a>
SMaRT AFIX Online Tool	Service (SVC)	SMaRT AFIX Online Tool Web Service Installation Instructions - Linux	SMaRT AFIX Online Tool Web Service Installation Instructions - Windows
Jaspersoft ETL Server (if not already installed) ( <b>NOTE:</b> Initial ETL loads can take several days; it's recommended to have them running while other components are being installed.)	Database and Batch (DBB)	Jaspersoft ETL Installation - Linux	Jaspersoft ETL Installation - Windows
SMaRT AFIX ETL	Database and Batch (DBB)	SMaRT AFIX Jaspersoft ETL Deployment - Linux	SMaRT AFIX Jaspersoft ETL Deployment - Windows
JasperReports Server (if not already installed)	Application (APP)	<a href="#">JasperReports Server Installation - Linux</a>	<a href="#">JasperReports Server Installation - Windows</a>



Component	Server	Linux	Windows
SMaRT AFIX Reports	Application (APP)	<a href="#">SMaRT AFIX JasperReports Deployment - Linux</a>	<a href="#">SMaRT AFIX JasperReports Deployment - Windows</a>
Node.js Server (if not already installed)	Application (APP)	<a href="#">Node.js Installation - Linux</a>	Node.js Installation - Windows
SMaRT AFIX Application Installation	Application (APP)	<a href="#">SMaRT AFIX Application Installation Instructions - Linux</a>	<a href="#">SMaRT AFIX Application Installation Instructions - Windows</a>
Keycloak Configuration for SMaRT AFIX	Service (SVC)	<a href="#">Keycloak Configuration for SMaRT AFIX (Linux and Windows)</a>	

# Linux Instructions

The following instructions are for the Linux operating system.

## Build a Linux (CentOs) Server

The instructions below explain how to install CentOS 7 Minimal and configure it. This is a base configuration suitable for reuse for all servers. An image or snapshot should be taken, if possible (such as in a cloud or AWS environment), so that these steps do not need to be performed again. Initially, the server is usually set up with the following:

- CentOS 7 Minimal (64-bit)
- 64-bit CPU
- 2GB RAM minimum
- 50GB HD minimum

These requirements are only for the initial setup. CPU, RAM, and storage requirements vary based on server use. Check the STC Suite specifications document prior to installing additional components on the server.

The instructions below explain how to build a base server from scratch. After following these steps, an image should be created so that these steps do not need to be performed again.

## Install CentOS 7 Minimal and Configure

CentOS 7 Minimal is installed in order to be able to start from a lean Linux installation. Packages and software components are added as needed.

1. Disable the SSH login as root - Run the remainder of this steps as root or use `sudo`.
2. Edit `sshd_config`. Vi is used here, but any editor can be used.

```
sudo vi /etc/ssh/sshd_config
```

3. On the line that says *#PermitRootLogin yes*, update it to the following (remember to remove the *#*):

```
PermitRootLogin no
```

4. Restart the sshd service:

```
sudo service sshd restart
```

5. By default, SELinux is set to be enforced. Change this by running:

```
sudo setenforce 0
```

6. Edit the following file so *permissive* persists across reboots:

```
sudo vi /etc/selinux/config
```

7. Change the line *SELINUX=enforcing* to the following and save the changes:

```
SELINUX=permissive
```

8. Make sure the software is completely up to date:

```
sudo yum update
```

9. Finally, install some basic packages:

```
sudo yum -y install net-tools gcc-c++ openssl-devel make git unzip bzip2  
wget vim-enhanced ntp epel-release tmux dos2unix patch
```

## Forecaster Installation Instructions - Linux

The installation of the Standalone Forecaster (SAF) is composed of three major tasks: install Oracle Express, install the SAF database into Oracle Express, and install the Forecaster web application into Tomcat. All three components are installed on the *Service* machine (SVC).

### Install Oracle Express

Perform the following steps as **root** user.

1. Install the OS libraries and packages on the Linux machine on which XE will be installed:

```
yum install bc binutils flex gcc glibc glibc-common glibc-devel libaio  
libstdc libXtst make sysstat
```

2. Create the Oracle user and the Oinstall group:

```
/usr/sbin/groupadd oinstall  
/usr/sbin/groupadd dba  
/usr/sbin/useradd -g oinstall -G dba oracle  
passwd oracle (Oracle123)  
id oracle
```

3. Download the Oracle XE rpm, `oracle-xe-11.2.0-1.0.x86_64.rpm.zip`, from <http://www.oracle.com/technetwork/database/database-technologies/express-edition/downloads/index.html> and copy it to the server.

4. In the directory where the oracle-xe-11.2.0-1.0.x86\_64.rpm.zip file is copied on the server, run these commands:

```
unzip -q oracle-xe-11.2.0-1.0.x86_64.rpm.zip
cd Disk1
rpm -i oracle-xe-11.2.0-1.0.x86_64.rpm
```

5. If the installation is successful, run this command as root. When it asks for an HTTP port, change it to 7080 so that it doesn't conflict with other installation applications. Set the initial SYS & SYSTEM password to WELCOME.

```
/etc/init.d/oracle-xe configure
```

6. Verify the connection to the database:

```
cd /u01/app/oracle/product/11.2.0/xe/bin
. ./oracle_env.sh
sqlplus system/<password>@XE
```

7. Get the database connection information:

```
[oracle@ ~]$ cd /u01/app/oracle/product/11.2.0/xe/network/admin
[oracle@ ~]$ cat tnsnames.ora
```

## Install the SAF Database (New Installation)

Copy the /SVC/OXE/db/ directory and all of its contents to your server under the Oracle user's home directory.

It is recommended you change the owner and permissions of the db directory by running the below commands as root:

```
chown -R oracle:oinstall db
chown -R 775 db
```

To install the SAF database, navigate to the /db/AFIX\_CDSI\_Install/AFIX\_CDSI\_v5.16.9\_Install/ directory and execute the following command as user oracle. Note that your path to bin/oracle/env.sh may differ.

```
./u01/app/oracle/product/11.2.0/xe/bin/oracle_env.sh
sh Install.sh
```

Next, navigate to /db/Patches/ and run the following:

```
/patch_v5_17_CDSI/forecast.sh
/patch_v5_18_CDSI/forecast.sh
```

## Run Database Patches (Upgrades)

To update the Forecaster database to the most current patch version, navigate to /db/Patches/ and run the following:

```
/patch_v5_18_CDSI/forecast.sh
```

## Install the Web Application

Before installing the SMarT AFIX web application, Java 7 must be installed on the SVC server and Tomcat 7.0 must also be installed and running on the SVC server.

1. Edit the `conf/context.xml` file - Add the lines below (between the `<Context>` `</Context>` tags) to the `CATALINA_HOME/conf/context.xml` file. The added lines should be placed within the `<Context>` `</Context>` tags in the file.

```
<Context>
  <Resource name="jdbc/com/stc/forecaster"
    auth="Container"
    type="javax.sql.DataSource"
    driverClassName="oracle.jdbc.OracleDriver"
    url="jdbc:oracle:thin:@localhost:1521/XE"
    username="SAFUSER"
    password="SAF"
    maxActive="100"
    maxIdle="10"
    maxWait="-1"/>
</Context>
```

2. Navigate to the Application /SVC/SAF directory and execute this command:

```
$ cp forecaster.war $CATALINA_HOME/webapps/forecaster.war
```

3. Restart Tomcat.
4. Set the number of threads to the number of processor cores available on your server - Edit `$CATALINA_HOME/webapps/forecaster/WEB-INF/spring-ws-servlet.xml` and set the thread count (see the second line of code below):

```
<bean id="forecastingEndpoint12"
  class="com.stchome.saf.ws.endpoint.ForecasterServiceEndpoint12"
  scope="prototype">
  <constructor-arg value="1" /><!-- Thread count -->
  <constructor-arg value="60" /><!-- Thread pool termination timeout in
seconds-->
</bean>
```

5. Increase the Tomcat memory usage on your server - Edit `$CATALINA_HOME/bin/setenv.sh` and set the thread count (see the second line of code below):

```
export CATALINA_OPTS="$CATALINA_OPTS -Xms2048m"
```

```
export CATALINA_OPTS="$CATALINA_OPTS -Xmx2048m"
```

- Restart Tomcat.
- Verify the application is running correctly by navigating to `http://[YOUR SERVER]/forecaster`. The UI displays if the application was successfully installed and configured.

Vaccine Family	Suppress Dose1 Forecast	Vaccination Grace Period	Minimum Display Age	Maximum Patient Age
MENINGOCOCCAL B, OMV	<input checked="" type="checkbox"/>	4 ▼	1 ▼	1 ▼
DTaP/DT/Td/Tdap	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
HIB	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
POLIO	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
HEP-B 3 DOSE	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
MMR	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
VARICELLA	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
MENINGOCOCCAL	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
HEP-A	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
FLU	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
PNEUMO (PCV)	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
HEP-B 2 DOSE	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
MEASLES	<input checked="" type="checkbox"/>	4 ▼	1 ▼	1 ▼
MUMPS	<input checked="" type="checkbox"/>	4 ▼	1 ▼	1 ▼
RUBELLA	<input checked="" type="checkbox"/>	4 ▼	1 ▼	1 ▼
PNEUMO (PPSV)	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
ROTAVIRUS	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
HPV	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼
HERPES ZOSTER	<input type="checkbox"/>	4 ▼	1 ▼	1 ▼

## Postgres Database Installation - Linux

The information below describes how to install the Postgres database on Linux CentOS 7, as well as how to modify relevant Postgres server configuration settings for SMaRT AFIX.

### Install on Linux CentOS 7

Currently, SMaRT AFIX is using CentOS 7 as its Linux distribution. CentOS 7 has Postgres 9.2 included with its default repositories. Postgres 9.4 is required for SMaRT AFIX. The following steps detail how to upgrade to Postgres 9.4.

Before continuing, it is assumed that you have already followed the [Build a Linux \(CentOS\) Server](#) instructions.

- Exclude the `postgresql` package from the CentOS base repositories - Edit `/etc/yum.repos.d/CentOS-Base.repo` and add the exclude lines below to the

[base] and [updates] sections, then save the changes. Note that this must be sudo'd to act as root to edit the file:

```
[base]
name=CentOS-$releasever - Base
mirrorlist=http://mirrorlist.centos.org/?release=$releasever&arch=$basearch&repo=
os&infra=$infra
#baseurl=http://mirror.centos.org/centos/$releasever/os/$basearch/
gpgcheck=1
gpgkey=file:///etc/pki/rpm-gpg/RPM-GPG-KEY-CentOS-7
exclude=postgresql*

#released updates
[updates]
name=CentOS-$releasever - Updates
mirrorlist=http://mirrorlist.centos.org/?release=$releasever&arch=$basearch&repo=
updates&infra=$infra
#baseurl=http://mirror.centos.org/centos/$releasever/updates/$basearch/
gpgcheck=1
gpgkey=file:///etc/pki/rpm-gpg/RPM-GPG-KEY-CentOS-7
exclude=postgresql*
```

2. Install the PGDG RPM file:

```
sudo yum install -y
https://download.postgresql.org/pub/repos/yum/9.4/redhat/rhel-7-
x86_64/pgdg-centos94-9.4-2.noarch.rpm
```

3. Trigger the packages update:

```
sudo yum update
```

4. Install the Postgres 9.4 server/packages:

```
sudo yum install -y postgresql94-server postgresql94-libs
```

5. Initialize the Postgres database:

```
sudo /usr/pgsql-9.4/bin/postgresql94-setup initdb
```

6. Set Postgres to run as a service and start Postgres:

```
sudo systemctl enable postgresql-9.4
sudo systemctl start postgresql-9.4
```

## Modify Postgres Server Configuration Settings

Some of the Postgres server configuration settings must be modified.

1. Act as the *postgres* user to perform admin level changes:

```
sudo su - postgres
cd 9.4/data/
```

2. Add the Postgres `/bin/` directory to your path. Edit the `~/.bash_profile` and add the following to the end of the file, then save the file:

```
PATH=/usr/pgsql-9.4/bin:$PATH
export PATH
```

3. Run the following to update the bash environment PATH:

```
source ~/.bash_profile
```

4. Edit `postgres.conf` with your favorite editor and add the following line right after **# - Connection Settings -**, then save the file:

```
listen_addresses = '*'
```

5. Edit the `pg_hba.conf` file to allow connections from other STC servers/applications and secure the connection using md5 instead of clear text passwords. Change the following line:

```
host    all        all        127.0.0.1/32      md5
```

to something like the following, which will enforce md5-encrypted password communication. Let's assume your internal sub-net falls under 192.168.x.x, which would update the line to:

```
host    all        all        192.168.0.0/16    md5
```

6. Save the changes. If you are technical and familiar enough with CIDR notation, you can further customize and restrict connection access as needed.
7. Trigger Postgres to reload with the new configuration changes by running:

```
pg_ctl restart
```

8. Complete the installation by initializing the database (see [SMaRT AFIX Database Initialization - Linux](#)).

## Add Fuzzy Search Module to Postgres DB

In independent deployments of SMaRT AFIX, provider data is pulled from the SMaRT AFIX Postgres database. This requires that an additional plugin be added to the database to enable fuzzy searching.

1. Log in to the database server (dbb) as a root user:

```
sudo su - root
```

2. Install the contrib package:



```
yum install postgresql-contrib
```

3. Enter "Y" when prompted.
4. Switch to postgres user:

```
sudo su - postgres
```

5. Log in to afixdb and create an extension for the fuzzy search:

```
psql -d afixdb  
afixdb=# create extension fuzzystrmatch;  
CREATE EXTENSION
```

## SMaRT AFIX Database Initialization - Linux

The information below describes how to initialize the database for the first time, how to upgrade/migrate an existing database, and how to set up daily jobs.

### Prerequisite Tasks

Perform the following tasks before initializing the database:

1. Confirm that PostgreSQL has been installed.
2. Download the release distribution zip file from /DBB/POSTGRES and extract the database scripts for the database server.
3. As a root user, give read, write, and execute permissions on the flyway command - Navigate to the /DBB/POSTGRES directory and execute this command:

```
cd /DBB/POSTGRES/  
chmod 755 flyway
```

4. As a root user, install the dos2unix package:

```
yum install dos2unix
```

5. As a Postgres user, run the dos2unix command for the flyway file to make it compatible for Linux - Navigate to the /DBB/POSTGRES directory and execute this command:

```
cd /DBB/POSTGRES/  
dos2unix flyway
```

6. State-specific eligibility: If your state uses one or more state-specific codes for VFC eligibility, you will need to make a modification to the /DBB/POSTGRES/sql/OLAP/OLAP\_V1\_0\_2\_\_R1\_Afix\_OLAP\_Initial\_Data.sql file. Add the state-specific codes to the DIM\_VFC\_ELIGIBLE section as noted below. Be

sure to increment the vfc\_eligible\_key value for each state-specific code you add. State-specific codes should be added exactly as they appear in your system database.

```
... --DB_script for DIM_VFC_ELIGIBLE---
INSERT INTO olap.dim_vfc_eligible(vfc_eligible_key,
vfc_eligible_code, created_ts)
VALUES (1, 'Not VFC Eligible-Underinsured', current_timestamp),
(2, 'VFC Eligible - State Specific Eligiblity',
current_timestamp),
(3, 'Local-Specific Eligiblity', current_timestamp),
(4, 'Not VFC Eligible', current_timestamp),
(5, 'American Indian/Alaska Native', current_timestamp),
(6, 'Uninsured', current_timestamp),
(7, 'Federally Qualified Health Center patient',
current_timestamp),
(8, 'Medicaid', current_timestamp),
--Add State Codes here----
(9, 'State Specific Code', current_timestamp),
(-1, 'Unknown', current_timestamp);
...
```

## Initialize a New Database (for the First Time Only)

If this is the first time you are initializing the database, follow the steps below. Otherwise, see the [Upgrade/Migrate an Existing Database](#) instructions.

1. Act as the postgres user:

```
sudo su - postgres
```

2. Prepare the tablespace by creating the directories that will be used by afixdb:

```
mkdir -p /var/lib/pgsql/9.4/afixdb
mkdir -p /var/lib/pgsql/9.4/afixdb/data
mkdir -p /var/lib/pgsql/9.4/afixdb/olapdata
```

3. Add postgres to your path:

```
export PATH=$PATH:/usr/pgsql-9.4/bin
```

4. Create the afixdb by navigating to the /DBB/POSTGRES directory and executing this command:

```
cd /DBB/POSTGRES/
psql -a -f setup_database.sql
```

5. Create the database users and roles:

```
psql -d afixdb -a -f setup_objects.sql
```

6. Create the APP configuration schema:

```
./flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=app -
sqlMigrationPrefix=APP_V -user=afix migrate
```

7. Create the ODS schema:

```
./flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=ods -
sqlMigrationPrefix=ODS_V -user=afix migrate
```

8. Create the OLAP schema:

```
./flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=olap -
sqlMigrationPrefix=OLAP_V -user=afix migrate
```

## Upgrade/Migrate an Existing Database

If this is not the first time you are initializing the database, follow the steps below. Otherwise, see the [Initialize a New Database \(for the First Time Only\)](#) instructions.

1. Act as the postgres user:

```
sudo su - postgres
```

2. Migrate the APP configuration schema:

```
./flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=app -
sqlMigrationPrefix=APP_V -user=afix migrate
```

3. Migrate the ODS schema:

```
./flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=ods -
sqlMigrationPrefix=ODS_V -user=afix migrate
```

4. Migrate the OLAP schema:

```
./flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=olap -
sqlMigrationPrefix=OLAP_V -user=afix migrate
```

## Set Up a Daily Job / Drop Partition

1. Copy partition.sql from the /DBB/POSTGRES directory to /var/lib/pgsql/9.4/afixdb:

```
cp partition.sql /var/lib/pgsql/9.4/afixdb
```

2. Add a crontab entry to run the partition script daily at 1:00 a.m. to create future partitions and drop old partitions:

```
[postgres@interop-qa0-dbb ~]$ crontab -e
#Add below 2 entries and save it (Esc + Shift + : + wq + Enter)
LOGFILE_AFIXDB=/var/lib/pgsql/9.4/afixdb/partition.log
```

```
0 1 * * * echo "-----" >> $LOGFILE_AFIXDB ;  
date >> $LOGFILE_AFIXDB ; psql -d afixdb -U postgres -f  
/var/lib/pgsql/9.4/afixdb/partition.sql &&gt; $LOGFILE_AFIXDB
```

## SMaRT AFIX Database Initialization - RDS

The information below describes how to initialize the database for the first time, how to upgrade/migrate an existing database, and how to set up daily jobs.

### Prerequisite Tasks

Perform the following tasks before initializing the database:

1. Confirm that PostgreSQL has been installed.
2. Download the release distribution zip file from /DBB/POSTGRES and extract the database scripts for the database server.
3. As a root user, give read, write, and execute permissions on the flyway command - Navigate to the /DBB/POSTGRES directory and execute this command:

```
cd /DBB/POSTGRES/  
chmod 755 flyway
```

4. As a root user, install the dos2unix package:

```
yum install dos2unix
```

5. As a Postgres user, run the dos2unix command for the flyway file to make it compatible for Linux - Navigate to the /DBB/POSTGRES directory and execute this command:

```
cd /DBB/POSTGRES/  
dos2unix flyway
```

### Initialize a New Database (for the First Time Only)

If this is the first time you are initializing the database, follow the steps below. Otherwise, see the [Upgrade/Migrate an Existing Database](#) instructions.

1. Add postgres to your path:

```
export PATH=$PATH:/usr/pgsql-9.4/bin
```

2. Create the afixdb by navigating to the /usr/pgsql-9.4/bin directory and executing this command. Enter the password at the end.

```
cd /usr/pgsql-9.4/bin  
psql -h <rds_hostname> -d <default_db_created_with_RDS> -p <DB_port> -u
```

```
<RDS-superuser> -f /DBB/POSTGRES/setup_database_Rds.sql
```

3. Create the database users and roles:

```
cd /usr/pgsql-9.4/bin  
psql -u <rds_hostname> -d afixdb -p <DB_port> -u <RDS-superuser> -f  
/DBB/POSTGRES/setup_objects.sql
```

4. Create the APP configuration schema:

```
./flyway -url=jdbc:postgresql://<RDS-hostname>:5432/afixdb -schemas=app  
-sqlMigrationPrefix=APP_V -user=afix migrate
```

5. Create the ODS schema:

```
./flyway -url=jdbc:postgresql://<RDS-hostname>:5432/afixdb -schemas=ods  
-sqlMigrationPrefix=ODS_V -user=afix migrate
```

6. Create the OLAP schema:

```
./flyway -url=jdbc:postgresql://<RDS-hostname>:5432/afixdb -schemas=olap  
-sqlMigrationPrefix=OLAP_V -user=afix migrate
```

7. Create the .pgpass file under the home directory (usually root):

```
vi ~/.pgpass
```

8. Add these contents into the .pgpass file and save it:

```
<RDS_hostname>:<port>:<database>:<username>:<password>
```

## Upgrade/Migrate an Existing Database

If this is not the first time you are initializing the database, follow the steps below. Otherwise, see the [Initialize a New Database \(for the First Time Only\)](#) instructions.

1. Act as the postgres user:

```
sudo su - postgres
```

2. Migrate the APP configuration schema:

```
./flyway -url=jdbc:postgresql://<RDS-hostname>:5432/afixdb -schemas=app  
-sqlMigrationPrefix=APP_V -user=afix migrate
```

3. Migrate the ODS schema:

```
./flyway -url=jdbc:postgresql://<RDS-hostname>:5432/afixdb -schemas=ods  
-sqlMigrationPrefix=ODS_V -user=afix migrate
```

4. Migrate the OLAP schema:

```
./flyway -url=jdbc:postgresql://<RDS-hostname>:5432/afixdb -schemas=olap  
-sqlMigrationPrefix=OLAP_V -user=afix migrate
```

## Set Up a Daily Job / Drop Partition

1. Copy partition.sql from the /DBB/POSTGRES directory to /opt/partitionDir:

```
cp partition.sql /opt/partitionDir  
chmod 755 /opt/partitionDir/partition.sql
```

2. Add a crontab entry to run the partition script daily at 1:00 a.m. to create future partitions and drop old partitions:

```
[postgres@interop-qa0-dbb ~]$ crontab -e  
#Add below 2 entries and save it (Esc + Shift + : + wq + Enter)  
LOGFILE_AFIXDB=/opt/partitionDir/partition.log  
0 1 * * * echo "-----" >> $LOGFILE_AFIXDB ;  
date >> $LOGFILE_AFIXDB ; cd /usr/psql-9.4/bin ; psql -d afixdb -h <RDS-  
hostname> -U <username> -f /opt/partitionDir/partition.sql &>>  
$LOGFILE_AFIXDB
```

# SMaRT AFIX Database Migration from EC2 Postgres to RDS

The following instructions explain how to perform a database migration from EC2 Postgres to RDS.

## Prerequisite Tasks

Perform the following tasks before initializing the database:

1. Confirm that the PostgreSQL client (Psql) has been installed.
2. Download the release distribution zip file from /DBB/POSTGRES and extract the database scripts for the database server.
3. As a root user, give read, write, and execute permissions on the flyway command  
- Navigate to the /DBB/POSTGRES directory and execute this command:

```
cd /DBB/POSTGRES/  
chmod 755 flyway
```

4. As a root user, install the dos2unix package:

```
yum install dos2unix
```

5. As a Postgres user, run the dos2unix command for the flyway file to make it compatible for Linux - Navigate to the /DBB/POSTGRES directory and execute this command:

```
cd /DBB/POSTGRES/  
dos2unix flyway
```

## Create Dump File from Postgres

Use these instructions to create a dump file from Postgres installed in the EC2 instance:

1. Log in as a Postgres user and create a dump file using this command:

```
su - postgres  
pg_dump dbname=afixdb -f myafixdump.sql
```

2. Save this SQL file (myafixdump.sql) into the most convenient directory.

## Initialize a New Database (for the First Time Only)

Follow these steps to initialize the new database for the first time only:

1. Add postgres to your path:

```
export PATH=$PATH:/usr/pgsql-9.4/bin
```

2. Create the afixdb by navigating to the /usr/pgsql-9.4/bin directory and executing this command. Enter the password at the end.

```
cd /usr/pgsql-9.4/bin  
psql -h <rds_hostname> -d <default_db_created_with_RDS> -p <DB_port> -U  
<RDS-superuser> -f /DBB/POSTGRES/setup_database_Rds.sql
```

3. Create the database users and roles:

```
cd /usr/pgsql-9.4/bin  
psql -u <rds_hostname> -d afixdb -p <DB_port> -u <RDS-superuser> -f  
/DBB/POSTGRES/setup_objects_Rds_Migration_From_Ec2.sql
```

4. Restore the dump file created in the previous section into the RDS console using this command:

```
cd /usr/pgsql-9.4/bin  
psql -h <rds_hostname> -p <DB_port> -U <RDS-superuser> -d afixdb -f  
/var/lib/pgsql/myafixdump.sql
```

5. Create the APP configuration schema:

```
./flyway -url=jdbc:postgresql://<RDS-hostname>:5432/afixdb -schemas=app  
-sqlMigrationPrefix=APP_V -user=afix migrate
```

6. Create the ODS schema:

```
./flyway -url=jdbc:postgresql://<RDS-hostname>:5432/afixdb -schemas=ods  
-sqlMigrationPrefix=ODS_V -user=afix migrate
```

7. Create the OLAP schema:

```
./flyway -url=jdbc:postgresql://<RDS-hostname>:5432/afixdb -schemas=olap  
-sqlMigrationPrefix=OLAP_V -user=afix migrate
```

8. Create the .pgpass file under the home directory (usually root):

```
vi ~/.pgpass
```

9. Add these contents into the .pgpass file and save it:

```
<RDS_hostname>:<port>:<database>:<username>:<password>
```

## Set Up a Daily Job / Drop Partition

1. Copy partition.sql from the /DBB/POSTGRES directory to /opt/partitionDir:

```
cp partition.sql /opt/partitionDir  
chmod 755 /opt/partitionDir/partition.sql
```

2. Add a crontab entry to run the partition script daily at 1:00 a.m. to create future partitions and drop old partitions:

```
[postgres@interop-qa0-dbb ~]$ crontab -e  
#Add below 2 entries and save it (Esc + Shift + : + wq + Enter)  
LOGFILE_AFIXDB=/opt/partitionDir/partition.log  
0 1 * * * echo "-----" >> $LOGFILE_AFIXDB ;  
date >> $LOGFILE_AFIXDB ; cd /usr/psql-9.4/bin ; psql -d afixdb -h <RDS-  
hostname> -U <username> -f /opt/partitionDir/partition.sql &>>  
$LOGFILE_AFIXDB
```

## SMaRT AFIX Online Tool Web Service Installation - Linux

The SMaRT AFIX Online Tool web service is used by the SMaRT AFIX application to generate an XML file to be uploaded to the CDC's AFIX online tool application. The web service is a simple web application that is installed alongside the Stand Alone Forecaster on the Service machine (SVC).

### Prerequisites

1. The Postgres database is installed and configured.



2. The Postgres password for the SMaRT AFIX database is known.
3. The Tomcat instance is installed on the SVC server.
4. All necessary ports are open across all firewalls.
5. The release distribution file for the SMaRT AFIX Online Tool web service is extracted from `/SVC/ONLINE_TOOL/afix.export.ws.war` and copied to your local drive.

## Installation Steps

1. Copy the `afix.export.ws.war` file to your Tomcat webapps folder (`$CATALINA_HOME` is your Tomcat installation directory):

```
$ cp afix.export.ws.war $CATALINA_HOME/webapps/afix.export.ws.war
```

2. Restart Tomcat.
3. Update the application properties to point to the proper Postgres database. Make sure the username and password are correct.
4. Edit the `$CATALINA_HOME/webapps/afix.export.ws/WEB-INF/app.properties` file:

```
driverClassName=org.postgresql.Driver
url=jdbc:postgresql://127.0.0.1:5432/afixdb
username=afixUser
password=afixPassword
```

5. Restart Tomcat.
6. Verify the installation with this command. Note that you may need to adjust the port from 8080, depending on your Tomcat configuration.

```
curl -XGET
'http://localhost:8080/afix.export.ws/api/v1/sitevisit/?org_id=
0&fac_id=0&cohort=All' -H "API-KEY: 123456" -H "accept:application/xml"
```

7. Verify that you have the following result:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<AFIXExport xsi:schemaLocation="http://www.cdc.gov/afix/online-
tool/1.1/exportSchema CDC_AFIX_Export.xsd"
xmlns="http://www.cdc.gov/afix/online-tool/1.1/exportSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <Header>
    <AwardeeName>No Provider Found</AwardeeName>
  </Header>
</AFIXExport>
```

# Jaspersoft ETL Installation - Linux

Follow these instructions to install Jaspersoft ETL, Apache Web Server, and Subversion, and to configure the administration console. This installation only needs to occur once.

## Prerequisites

1. Java JDK 8 (1.8.91) has been installed.
2. The environment variables JAVA\_HOME, JDK\_HOME, and PATH have been set. Example:

```
export JAVA_HOME=/usr/lib/jvm/jdk1.8_91
export JDK_HOME=/usr/lib/jvm/jdk1.8_91
export PATH=$JAVA_HOME/bin:$PATH
export PATH=$JDK_HOME/bin:$PATH
```

3. Copy the components from the distribution /Server Components/ETL directory into your local directory. These files include:
  - license.txt
  - TIBCOJaspersoft-JETL-Installer-20150908...zip
  - etl.zip

## Install Jaspersoft ETL

1. Download the Jaspersoft ETL installer zip file:

```
Server Components/ETL/TIBCOJaspersoft-JETL-Installer-20150908_1633-
V6.0.1-installer.zip
```

2. Place the installer into the installation directory:

```
/opt/TIBCOJaspersoft-JETL-Installer-20150908_1633-V6.0.1-installer.zip
```

3. Navigate to the installation directory:

```
$ cd /opt
```

4. Install the Unzip utility if it is not already present:

```
$ sudo yum install zip unzip -y
```

5. Unzip the installer:

```
$ sudo unzip TIBCOJaspersoft-JETL-Installer-20150908_1633-V6.0.1-
installer.zip
```

6. Set the execute permission on the installer:

```
$ sudo chmod +x TIBCOJaspersoft-JETL-Installer-20150908_1633-V6.0.1-linux64-installer.run
```

7. Execute the installer:

```
$ sudo ./TIBCOJaspersoft-JETL-Installer-20150908_1633-V6.0.1-linux64-installer.run
```

8. Follow the prompts to accept the license agreement.
9. Follow the prompts to specify the installation folder. Specify the /opt/TIBCOJaspersoft-6.0.1 directory.
10. Follow the prompts to select the install style of item 1 (Easy).
11. Follow the prompts to select the install type of item 1 (Server).
12. Follow the prompts to select the license file (provide the location of the license file).
13. Wait until the installation completes.

## Start/Stop Jaspersoft ETL Services

The following are the instructions to start and/or stop Jaspersoft ETL services. These steps are not mandatory on a first-time installation because the services will be running by default.

### Start/Stop Jaspersoft ETL Admin Console

Command to stop the service:

```
$ cd /opt/TIBCOJaspersoft-6.0.1/jac  
$ sudo ./stop_tac.sh
```

Command to start the service:

```
$ cd /opt/TIBCOJaspersoft-6.0.1/jac  
$ sudo ./start_tac.sh
```

### Start/Stop Jaspersoft ETL Command Line

Command to stop the service:

```
$ cd /opt/TIBCOJaspersoft-6.0.1/cmdline  
$ sudo ./stop_cmdline.sh
```

Command to start the service:

```
$ cd /opt/TIBCOJaspersoft-6.0.1/cmdline
$ sudo ./start_cmdline.sh
```

## **Start/Stop Jaspersoft ETL Job Server**

Command to stop the service:

```
$ cd /opt/TIBCOJaspersoft-6.0.1/jobserver
$ sudo ./stop_jobserver.sh
```

Command to start the service:

```
$ cd /opt/TIBCOJaspersoft-6.0.1/jobserver
$ sudo ./start_jobserver.sh
```

## **Auto Start/Stop Jaspersoft ETL Services**

Follow these instructions to automatically start and/or stop Jaspersoft ETL services.

**Note:** These steps are not mandatory for a first-time installation because the services run by default.

### ***Create New User***

Use this command to create a new user:

```
$ sudo adduser talenduser
```

Assign ownership of /etl and /opt/TIBCOJaspersoft-6.0.1 to the new user created above:

```
$ sudo chown -R talenduser:talenduser /etl
$ sudo chown -R talenduser:talenduser /opt/TIBCOJaspersoft-6.0.1
```

### ***Edit Startup Scripts***

Follow these steps to edit the startup scripts.

1. Copy these scripts from the package folder DBB/ETL/Autostart into a convenient directory:
  - jaspersoft-cmdline-6.0.1
  - jaspersoft-jac-6.0.1
  - jaspersoft-rjs-6.0.1
2. Copy the above files into the /etc/init.d directory.
3. Edit all three scripts and modify the environment variables as shown here:

```
* export JAVA_HOME=[Path for JAVA_HOME directory. This should be Oracle
```

```
JDK.]
* RUN_AS_USER=talenduser [If you are running as a root user, comment out
this statement.]
```

4. Edit the chkconfig setting to start the script on system reboot:

```
* chkconfig --level 235 jaspersoft-jac-6.0.1 on
* chkconfig --level 235 jaspersoft-rjs-6.0.1 on
* chkconfig --level 235 jaspersoft-cmdline-6.0.1 on
```

## Configure the Admin Console

These steps are used one time only. They should be completed during the server installation.

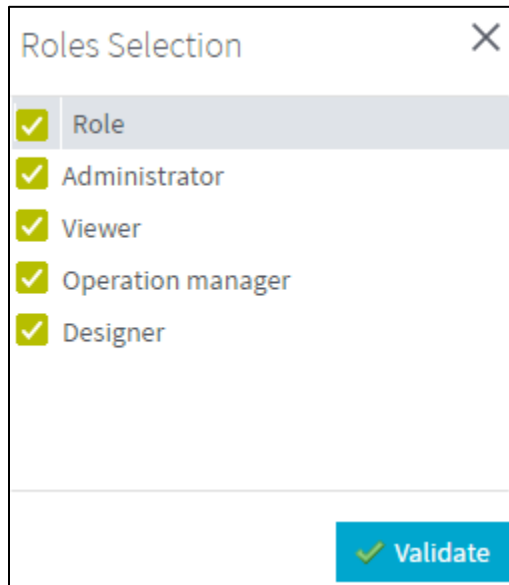
1. Navigate to `http://[host name]:8080/org.jaspersoft.administrator` and enter the default username and password (admin). For the username, use `admin@yourdomain.com` or replace it with an email group if the user needs email notifications on ETL job failure (example: `email_group@yourdomain.com`).
2. Navigate to **User Settings** on the left menu and update the username (if needed) and library information.

The screenshot shows the 'Data' user settings page in the Jaspersoft Administrator console. The form includes fields for Login, First name, Last name, Password (with a 'change password' button), Svn login, Svn password, Type (set to 'Data Integration'), Role (set to 'Administrator/Viewer/'), and an 'Active' checkbox (checked). Below this is the 'Connections stats' section, which is divided into 'To the Administration Center' and 'To the Studio'. Each section has fields for 'First' (timestamp), 'Last' (timestamp), and 'Number' (count). At the bottom, there are 'Save' and 'Cancel' buttons.

Data	
Login:	admin@stchome.com
First name:	admin
Last name:	admin
Password:	<button>change password</button>
Svn login:	tisadmin
Svn password:	*****
Type:	Data Integration
Role:	Administrator/Viewer/
Active:	<input checked="" type="checkbox"/>
Connections stats	
To the Administration Center	
First:	2016-05-25 14:15:16
Last:	2016-05-25 14:15:16
Number:	1
To the Studio	
First:	
Last:	
Number:	0

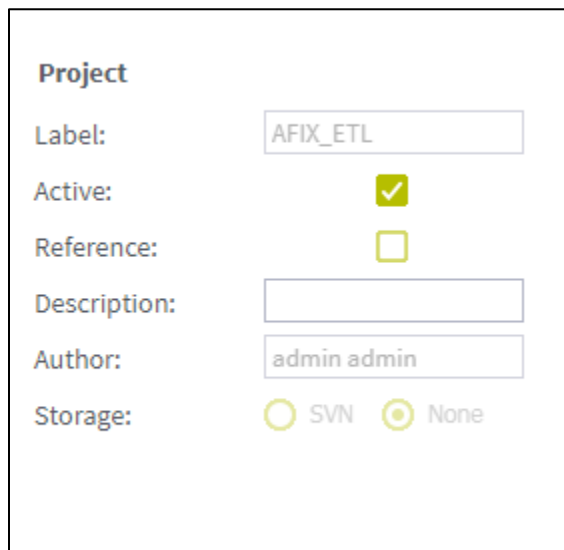
Save Cancel

3. Click on **Role** and select all of the roles.



A dialog box titled "Roles Selection" with a close button (X) in the top right corner. It contains a list of roles, each with a checked checkbox: Role, Administrator, Viewer, Operation manager, and Designer. At the bottom right, there is a blue button with a checkmark and the text "Validate".

4. Navigate to **Project settings** from the left menu and add a new project by clicking the **Add** button.
5. Name the project as **AFIX\_ETL**, select the **Active** option, enter **AFIX\_ETL** as the description and **admin admin** as the Author, select **None** as the storage, and save it.



A form titled "Project" with the following fields and values: Label: AFIX\_ETL; Active: checked checkbox; Reference: unchecked checkbox; Description: empty text box; Author: admin admin; Storage: radio buttons for SVN (unchecked) and None (checked).

6. Navigate to **Project authorization** from the left menu. Click on each of the newly created projects and assign read/write permissions to the user.

User Authorizations for the Project: AFIX_ETL									
Authorizations by Project					Authorizations by User				
Project					User Authorizations for the Project: AFIX_ETL				
Project ...	Label				Type	Login	Last name	First na...	Active
AFIX_ETL		1	1			admin@stchome.com	admin	admin	Active

7. Create the following directories and files in the server:

```

sudo mkdir /opt/TIBCOJaspersoft-6.0.1/deploy
sudo mkdir /opt/TIBCOJaspersoft-6.0.1/deploy/generatedJobs
sudo mkdir /opt/TIBCOJaspersoft-6.0.1/deploy/executionLogs
sudo mkdir /opt/TIBCOJaspersoft-6.0.1/cmdline/exports
sudo mkdir /opt/TIBCOJaspersoft-6.0.1/Audit
sudo mkdir /opt/TIBCOJaspersoft-6.0.1/Audit/reports
sudo mkdir /opt/TIBCOJaspersoft-6.0.1/joblogs
sudo touch /opt/TIBCOJaspersoft-6.0.1/joblogs/log

```


8. In Primary Command Line configuration, set the path for the Job generation folder to /opt/TIBCOJaspersoft-6.0.1/cmdline/exports


CommandLine/primary (5 Parameters)		✓
Host:	localhost	✓
Port:	8002	✓
Job generation folder:	/opt/TIBCOJaspersoft-6.0.1/cmdline/exports	✓ Validity of path cannot be checked
User component path:		✓ Validity of path cannot be checked
Version	6.0.1.20150908_1633	✓


9. In Job Conductor configuration, set the path for the Generated jobs folder to /opt/TIBCOJaspersoft-6.0.1/deploy/generatedJobs and the path to the Tasks logs folder to /opt/TIBCOJaspersoft-6.0.1/deploy/executionLogs


Job Conductor (7 Parameters)		✓
Generated jobs folder:	/opt/TIBCOJaspersoft-6.0.1/deploy/generatedJobs	✓
Tasks logs folder:	/opt/TIBCOJaspersoft-6.0.1/deploy/executionLogs	✓
Number of executions log:	1000	✓
Maximum age of log file(d):	0	✓
Maximum number of generated jobs:	3	✓
Maximum age of generated job(d):	0	✓
Quartz servlet		✓ Initialized

10. In Logging configuration, set the Technical log file path to /opt/TIBCOJaspersoft-6.0.1/joblogs/log



☐ Logging (4 Parameters / 1 errors) 


Technical log file path:  


Technical log threshold:  


Business log file path:  


11. In Audit configuration, set the Reports stored path to /opt/TIBCOJaspersoft-6.0.1/Audit/reports


 Audit (6 Parameters) 


Url:  

User:  

Password:  

Driver:  

Web Console <http://52.33.215.54:8080/org.jaspersoft.administrator/h2console> 

Reports stored path:  

12. Navigate to **Servers** page from the menu and create a new execution sever with the following settings:
- Label: Name of the job server
  - Host: ETL Server IP (it usually ends with *dbb*)
  - Command port: 8000
  - File transfer port: 8001
  - Monitoring port: 8888
  - Active: Select this option (enable)
  - Username: the admin username for the ETL
  - Password: the password for the admin ETL user



**Execution server**

Label:

qa0-etl

Description:

Host:

10.0.5.137

Time zone:

Command port:

8000

File transfer port:

8001

Monitoring port:

8888

Timeout on unknown state (s):

120

Username:

admin@stchome.com

Password:

.....

Use SSL:

☐

Active:

☒

☐ Jaspersoft Runtime

13. Log in via SSH to the Unix server using the ETL server owner.
14. Copy the `etl.zip` file (from `/DBB/ETL`) to a location convenient for you on the ETL Jaspersoft server to unzip the file, such as a home directory.
15. Unzip the `etl.zip` file to the server in the root directory (Unix), which creates a directory structure similar to this:
  - `/etl`
  - `/etl/data`
  - `/etl/archive`

## SMaRT AFIX Jaspersoft ETL Deployment - Linux

The following outlines how to import (migrate) Jaspersoft ETL for SMaRT AFIX.

## Pre-Migration Checklist

- Confirm that the Postgres database is installed and configured
- Retrieve the passwords for the SMaRT AFIX database (*afixdb*)
- Retrieve the Jaspersoft ETL admin username and password
- Confirm that port 8080 is open across all firewalls
- Confirm that all of the steps in the Admin Console configuration are completed on a first-time installation
- Copy these components from /DBB/ETL into your local directory:
  - API\_Vaildation\_Sequential\_Execution\_0.1
  - etl
  - Forecaster\_Sequential\_Execution\_0.1
  - ODS\_Sequential\_Execution\_0.1
  - OLAP\_Sequential\_Execution\_0.1
  - AFIX\_Assessment\_Benchmark\_0.1
  - UserApi\_Sequential\_Execution\_0.1
- Identify whether the installation is an upgrade from prior versions or a fresh installation from scratch.

## New Installation Instructions (for the First Time Only)

If this is the first time you deploying Jaspersoft ETL, follow the steps below. Otherwise, see the [Upgrade Instructions](#).

The steps below only need to be performed once. They should be completed during the server installation.

### Configure the Admin Console

1. Navigate to `http://[host name]:8080/org.jaspersoft.administrator` and enter the default username and password (admin). For the username, use `admin@yourdomain.com` or replace it with an email group if the user needs email notifications on ETL job failure (example: `email_group@yourdomain.com`).
2. Navigate to **Project settings** from the left menu and add a new project by clicking the **Add** button.
3. Name the new project **AFIX\_ETL**. Select the **Active** option, enter **admin admin** as the Author, and select **SVN** as the Storage.

**Project**

Label:

Active: ☒

Reference: ☐




Description:

Author:


Storage: ☐ SVN ☒ None

4. Navigate to **Project authorization** from the left menu. Click on the newly created project and assign read/write permission to the user.

User Authorizations for the Project: **AFIX\_ETL**

Type	Login	Last name	First na...	Active	Right
	admin@stchome.com	admin	admin		

5. Navigate to **Servers** page from the menu and create a new execution server with the following settings:
- Label: AFIX\_jobServer
  - Host: ETL Server IP (it usually ends with *dbb*)
  - Command port: 8000
  - File transfer port: 8001
  - Monitoring port: 8888
  - Active: Select this option (enable)
  - Username: the admin username for the ETL
  - Password: the password for the admin ETL user

Execution server	
Label:	<input type="text" value="qa0-etl"/>
Description:	<input type="text"/>
Host:	<input type="text" value="10.0.5.137"/>
Time zone:	<input type="text"/> 
Command port:	<input type="text" value="8000"/>
File transfer port:	<input type="text" value="8001"/>
Monitoring port:	<input type="text" value="8888"/>
Timeout on unknown state (s):	<input type="text" value="120"/>
Username:	<input type="text" value="admin@stchome.com"/>
Password:	<input type="password" value="....."/>
Use SSL:	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>
<input type="checkbox"/> Jaspersoft Runtime	

6. Log in via SSH to the Unix server using the ETL server owner.
7. Copy the `etl.zip` file (from `/DBB/ETL`) to a location convenient for you on the ETL Jaspersoft server to unzip the file, such as a home directory.
8. Unzip the `etl.zip` file to the server in the root directory (Unix), which creates a directory structure similar to this:
  - `/etl/afix`
  - `/etl/afix/api`
  - `/etl/afix/archive`
  - `/etl/afix/bulkload`
  - `/etl/afix/dataout`
  - `/etl/afix/input`
  - `/etl/afix/rejects`
  - `/etl/afix/tmp`
  - `/etl/afix/validation`

## Deploy the ETL Components

1. If a previous ETL Projects already exists, perform a backup of it.
2. Copy the following files from the installation files to a convenient location to deploy:
  - UserApi\_Sequential\_Execution.zip
  - API\_Validation\_Sequential\_Execution.zip
  - ODS\_Sequential\_Execution.zip
  - Forecaster\_Sequential\_Execution\_0.1.zip
  - OLAP\_Sequential\_Execution.zip
  - AFIX\_Assesment\_Benchmark.zip
3. Navigate to the Job Conductor page.
4. Select **Add > Normal Task** and add the following: Label = User API Execution; Description = User API Execution.
5. Click **Import Generated Jobs** and select the UserApi\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
6. Click **Save**.
7. Navigate to the task **AFIX IWeb API Validation**.
8. Select **Add > Normal Task** and add the following: Label = AFIX IWEB API Validation; Description = AFIX IWEB API Validation.
9. Click **Import Generated Jobs** and select the API\_Validation\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
10. Click **Save**.
11. Select **Add > Normal Task** and add the following: Label = AFIX Stage 2 ODS Load; Description = AFIX Stage 2 ODS Load.
12. Click **Import Generated Jobs** and select the ODS\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
13. Click **Save**.
14. Select **Add > Normal Task** and add the following: Label = AFIX Forecast Execution; Description = AFIX Forecast Execution.

15. Click **Import Generated Jobs** and select the `Forecaster_Sequential_Execution.zip` file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
16. Click **Save**.
17. Select **Add > Normal Task** and add the following: Label = AFIX OLAP Execution; Description = AFIX OLAP Execution.
18. Click **Import Generated Jobs** and select the `OLAP_Sequential_Execution.zip` file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
19. Click **Save**.
20. Select **Add > Normal Task** and add the following: Label = AFIX Assessment Benchmark; Description = AFIX Assessment Benchmark.
21. Click **Import Generated Jobs** and select the `AFIX_Assessment_Benchmark.zip` file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
22. Click **Save**.
23. For each job created above, update the following Contexts within the Context tab located at the bottom of the page. Select custom values as needed. If the client is configured to receive email notifications about failures/successes, then Email\_active should be True; otherwise it should be false. For Email\_Active=True, all of the parameters in the Email section should be keyed in with proper values.
  - Email\_To
  - Email\_SMTP\_Host
  - Email\_SMTP\_Port
  - AFIX\_Email\_Notification
  - Email\_Active
  - Email\_UserName
  - Email\_Password
  - Web service related parameters (Forecaster):
    - SOAP\_ACTION
    - ENDPOINT
  - Database-related parameters:
    - AFIX\_DB - Login, Password, Port, Database, and Server

- Source\_DB\_Context - Login, Password, Port, Database, and Server
- RDS-related parameters for ODS\_sequential\_job
  - Psql\_Path - Path of the psql (by default, it is /usr/pgsql-9.4/bin)
  - Rds\_Postgres - A boolean parameter; set it to True if the database is RDS
  - Windows\_Execution\_Environment - A boolean parameter; set it to False; the ID of the ETL execution environment is UNIX.

24. Save when finished.

25. Initial load instructions:

- Run the **AssessmentBenchmark** task
- Go to the task **IWeb API Validation** and add a file trigger with the following values: Label = TriggerValidationAPI, Folder Path = /etl/afix/api, File Mask = START\_ETL\_RUN.tkn , Pollint(s) = 200

The screenshot shows the 'Add file trigger' dialog box with the following fields and values:

Field	Value	Checkbox
Label:	TriggerValidationAPI	
Description:	TriggerValidationAPI	
Pollint (s):	200	
Folder path:	/etl/afix/api	
File mask:	START_ETL_RUN.tkn	
Exist:		<input type="checkbox"/>
Created:		<input type="checkbox"/>
Modified:		<input checked="" type="checkbox"/>
Execution server:	AFIX_jobserver	
Pause trigger on error:		<input type="checkbox"/>

- Go to the task **AFIX Stage 2 ODS Load** and add a file trigger with these values: Label = TriggerODSLoad, Folder Path = /etl/afix/dataout, File Mask = API\_VALIDATION\_Complete.tkn, Pollint(s) = 200

The screenshot shows the 'Add file trigger' dialog box with the following fields and values:

Field	Value	Checkbox
Label:	TriggerODSLoad	
Description:	ODSLoad	
Pollint (s):	2000	
Folder path:	/etl/afix/dataout	
File mask:	API_VALIDATION_Complete.tkn	
Exist:		<input type="checkbox"/>
Created:		<input type="checkbox"/>
Modified:		<input checked="" type="checkbox"/>
Execution server:	AWS_AFIX_jobServer	
Pause trigger on error:		<input type="checkbox"/>

- Go to the task **AFIX Forecast Execution** and add a file trigger with the following values: Label = TriggerForecast, Folder Path = /etl/afix/dataout,

File Mask = API\_LOADS\_TO\_ODS\_Complete.tkn, Pollint(s) = 200. Add the JVM parameters -Xms1024M and -Xmx15690M

The screenshot shows the 'Add file trigger' dialog box with the following values:

- Label: TriggerForecast
- Description: (empty)
- Pollint (s): 1200
- Folder path: /etl/afix/dataout
- File mask: API\_LOADS\_TO\_ODS\_Complete.tkn
- Exist: ☐
- Created: ☐
- Modified: ☒
- Execution server: AWS\_AFIX\_jobServer
- Pause trigger on error: ☐

- Go to the task **AFIX OLAP Execution** and add a file trigger with the following values: Label = TriggerOLAP, Folder Path = /etl/afix/dataout, File Mask = Forecast\_Loads\_Complete.tkn, Pollint(s) = 200. Add the JVM parameters -Xms1024M and Xmx15690M

The screenshot shows the 'Add file trigger' dialog box with the following values:

- Label: TriggerOLAP
- Description: TriggerOLAP
- Pollint (s): 1800
- Folder path: /etl/afix/dataout
- File mask: Forecast\_Loads\_Complete.tkn
- Exist: ☐
- Created: ☐
- Modified: ☒
- Execution server: AWS\_AFIX\_jobServer
- Pause trigger on error: ☐

- Go to the task **UserApi Sequential Execution** and add a file trigger with the following values: Label = TriggeruserAPI, Folder Path = /etl/afix/dataout, File Mask = OLAP Complete.tkn, Pollint(s) = 200. After that, run the task **UserApi Sequential Execution**.

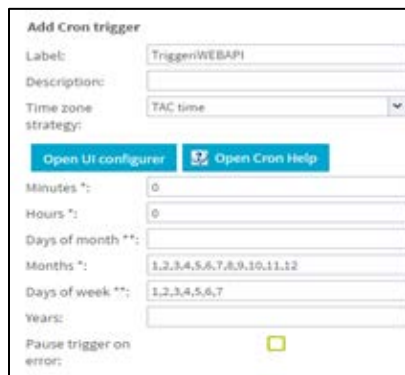
The screenshot shows the 'Add file trigger' dialog box with the following values:

- Label: TriggerUserLoad
- Description: TriggerUserLoad
- Pollint (s): 400
- Folder path: /etl/afix/dataout
- File mask: OLAP\_Complete.tkn
- Exist: ☐
- Created: ☐
- Modified: ☒
- Execution server: AFIX\_jobserver
- Pause trigger on error: ☐



26. Once the initial loads have completed, the ODS and OLAP tables are populated. Now the daily sequence can be scheduled. Go to the AFIX IWeb API Execution task and add the Cron trigger *Trigger\_IWeb\_API*. Enter the following values and save:

- Timezone Strategy: TAC Time
- Minutes: 0
- Hours: 0
- Days of Month: Leave blank
- Months: 1,2,3,4,5,6,7,8,9,10,11,12
- Days of the Week: 1,2,3,4,5,6,7
- Years: leave blank

A screenshot of a web-based configuration window titled "Add Cron trigger". The window contains several input fields and buttons. At the top, there are fields for "Label:" (containing "TriggerWEBAPI"), "Description:", and "Time zone strategy:" (with a dropdown menu showing "TAC time"). Below these are two buttons: "Open UI configurator" and "Open Cron Help". The main section contains fields for cron schedule components: "Minutes \*:" (0), "Hours \*:" (0), "Days of month \*:" (empty), "Months \*:" (1,2,3,4,5,6,7,8,9,10,11,12), "Days of week \*:" (1,2,3,4,5,6,7), and "Years:" (empty). At the bottom, there is a checkbox labeled "Pause trigger on error:" which is currently unchecked.

27. Turn on the notify/email feature. **Important Note:** SMTP needs to be configured beforehand.

- Select **Notifications** from the left menu
- Click **Add**
- Select the **Tasks** category
- Select **On task failed**
- Select **Enabled**
- Select **Recipients** to specify the user's email. It is better to create an email group as a recipient so that notifications are sent to multiple people
- Select **AFIX ETL Workflow**

If the upgrade needs to be aborted for any reason, import the previously created backup. Alternatively, redeploy the previous version of the content.

## Upgrade Instructions

If this is not the first time you are deploying Jaspersoft ETL (i.e., it was deployed earlier), follow the steps below. Otherwise, see the [New Installation Instructions](#).

The steps below only need to be performed once. They should be completed during the server installation.

### Configure the Admin Console

1. Navigate to `http://[host name]:8080/org.jaspersoft.administrator` and enter the default username and password (admin). For the username, use `admin@yourdomain.com` or replace it with an email group if the user needs email notifications on ETL job failure (example: `email_group@yourdomain.com`).
2. Log in via SSH to the Unix server using the ETL server owner.
3. Copy the `etl.zip` file (located at `/DBB/ETL`) to the Jaspersoft ETL server. Use a location convenient for you to unzip the file, such as a home directory.
4. Unzip the `etl.zip` file to the server in the Unix root directory (Unix), which adds the following files that were created as part of this release:
  - `/etl/afix`
  - `/etl/afix/api`
  - `/etl/afix/archive`
  - `/etl/afix/bulkload`
  - `/etl/afix/dataout`
  - `/etl/afix/input`
  - `/etl/afix/rejects`
  - `/etl/afix/tmp`
  - `/etl/afix/validation`

### Deploy the ETL Components

1. If a previous ETL Projects already exists, perform a backup of it.
2. Copy the following files from the installation files to a convenient location to deploy:
  - `UserApi_Sequential_Execution.zip`
  - `API_Validation_Sequential_Execution.zip`
  - `ODS_Sequential_Execution.zip`

- Forecaster\_Sequential\_Execution\_0.1.zip
  - OLAP\_Sequential\_Execution.zip
  - AFIX\_Assessment\_Benchmark.zip
3. Navigate to the Job Conductor page.
  4. Navigate to the task **AFIX Assessment Benchmark**.
  5. Click **Import Generated Jobs** and select the AFIX\_Assessment\_Benchmark.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
  6. Click **Save**.
  7. Navigate to the task **AFIX IWeb API Validation**.
  8. Click **Import Generated Jobs** and select the UserApi\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
  9. Click **Save**.
  10. Navigate to the task **AFIX IWeb API Validation**.
  11. Click **Import Generated Jobs** and select the API\_Validation\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
  12. Click **Save**.
  13. Navigate to the task **AFIX Stage 2 ODS Load**.
  14. Click **Import Generated Jobs** and select the ODS\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
  15. Click **Save**.
  16. Navigate to the task **AFIX Forecast Execution**.
  17. Click **Import Generated Jobs** and select the Forecaster\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
  18. Click **Save**.
  19. Navigate to the task **AFIX OLAP Execution**.
  20. Click **Import Generated Jobs** and select the OLAP\_Sequential\_Execution.zip file downloaded as part of the prerequisites.

Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.

21. Click **Save**.
22. For each job created above, update the following Contexts within the Context tab located at the bottom of the page. Select custom values as needed. If the client is configured to receive email notifications about failures/successes, then Email\_active should be True; otherwise it should be false. For Email\_Active=True, all of the parameters in the Email section should be keyed in with proper values.
  - Email\_To
  - Email\_SMTP\_Host
  - Email\_SMTP\_Port
  - AFIX\_Email\_Notification
  - Email\_Active
  - Email\_UserName
  - Email\_Password
  - Custom Date: Set to the current date +1. For example, if the current date is 2017-03-06, the context value should be set to 2017-03-07.
  - RDS-related parameters for ODS\_sequential\_job
    - Psql\_Path - Path of the psql (by default, it is /usr/pgsql-9.4/bin)
    - Rds\_Postgres - A boolean parameter; set it to True if the database is RDS
    - Windows\_Execution\_Environment - A boolean parameter; set it to False; the ID of the ETL execution environment is UNIX.
23. Save when finished.
24. Initial load instructions: Go to the task AFIX IWeb API Execution. Run the task and wait to see if the job executes without any issues. Once it has made progress, make sure each of these tasks is triggered and completes:
  - IWeb API Validation
  - State 2 ODS Load
  - Forecast Execution
  - OLAP Execution
25. Once the initial loads have completed, the ODS and OLAP tables are populated. Now the daily sequence can be scheduled. Resume the CRON trigger *Trigger\_IWeb\_API*. Go to the task OLAP\_Sequential\_Execution and change the context parameter *custom date* to the original value in OLAP\_Sequential\_Execution and save.

If the upgrade needs to be aborted for any reason, import the previously created backup. Alternatively, redeploy the previous version of the content.

# JasperReports Server Installation - Linux

The following instructions explain how to install the JasperReports Server.

## Prerequisite

Download all of the JasperReports Server contents from the distribution site. The JRS folder contains the following files:

- applicationContext-externalAuth-oAuth
- applicationContext-security
- applicationContext-security-web
- InstallCert\$SavingTrustManager.class
- InstallCert.class
- jasperreports-server-6.2.1-linux-x64-installer.exe
- jasperserver.license
- LatoFont
- stc-jaspersoft-oauth-0.0.1-SNAPSHOT

## Installation Steps

1. Download the JasperReports Server installer from the release distribution:

```
/Server Components/JRS/jasperreports-server-6.2.1-linux-x64-  
installer.run
```

2. Place the JasperReports Server installer into the target directory:

```
/opt/jasperreports-server-6.2.1-linux-x64-installer.run
```

3. Navigate to the target directory:

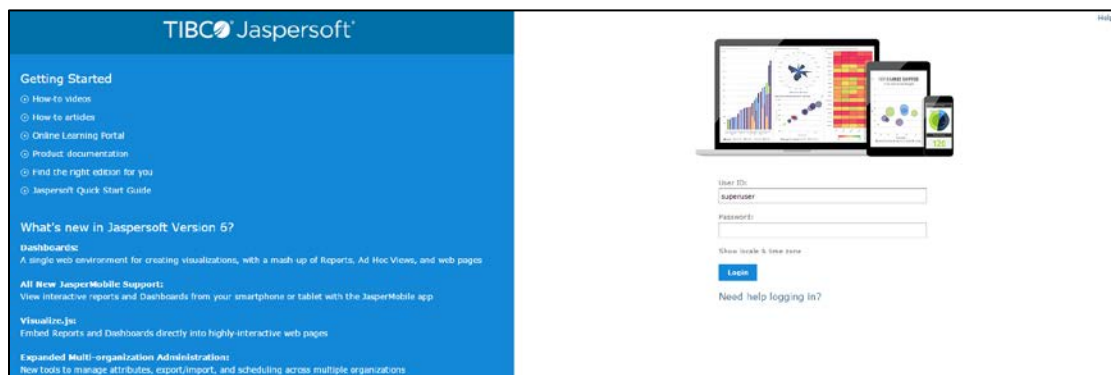
```
$ cd /opt
```

4. Set the execute permissions for the JasperReports Server installer:

```
$ sudo chmod u+x ./jasperreports-server-6.2.1-linux-x64-installer.run
```

5. Run the installer:





## Update the License File

Follow these steps to update the license file for the JasperReports server:

1. Copy the license file (`jasperserver.license`) from the distribution site and move it to your home directory using FTP or WinSCP.
2. Replace the license file in the JasperReports installation directory (`/opt/jasperreports-server-6.2.1/`) with the license file from the above step, overwriting the existing `jasperserver.license` file.
3. Restart the JasperReports server (see [Start/Stop the JasperReports Server](#) below).

## Increase the JasperReports Session Timeout Period

By default, the JasperReports timeout period is set to 20 minutes. However, the timeout period should be reset to 32 minutes in order to match with Keycloak.

1. Open `web.xml` from the path `/opt/jasperreports-server-6.2.1/apache-tomcat/webapps/jasperserver-pro/WEB-INF/web.xml`
2. Search for the property `<session-timeout>` under `<session-config>` and update the value to **32**. After this, the property and value should be similar to the image below:

```

<servlet>
  <servlet-name>AppThemeServlet</servlet-name>
  <servlet-class>com.jaspersoft.jasperserver.war.themes.ThemeResolverServlet</
servlet-class>
</servlet>
<servlet-mapping>
  <servlet-name>AppThemeServlet</servlet-name>
  <url-pattern>/_themes/*</url-pattern>
</servlet-mapping>
<!--App Themes END-->
<session-config>
  <!--Default to 20 minute session timeouts-->
  <session-timeout>32</session-timeout>
</session-config>
<jsp-config>
  <taglib>
    <taglib-uri>/WEB-INF/jasperserver.tld</taglib-uri>
    <taglib-location>/WEB-INF/jasperserver.tld</taglib-location>
  </taglib>
  <taglib>
    <taglib-uri>/spring</taglib-uri>
    <taglib-location>/WEB-INF/spring.tld</taglib-location>
  </taglib>
</jsp-config>
</>

```

3. Restart the JasperReports server (see [Start/Stop the JasperReports Server](#) below).

## Start/Stop the JasperReports Server

Use these commands to start and stop the JasperReports server.

### Start

```

$ cd /opt/jasperreports-server-6.2.1
$ ./ctlscript.sh start

```

### Stop

```

$ cd /opt/jasperreports-server-6.2.1
$ ./ctlscript.sh stop

```

## JasperReports Configuration with Keycloak

A few configuration changes need to be made in order for JasperReports to be used with Keycloak.

### Prerequisite

Keycloak must be installed and set up, if the SSO-enabled version of IWeb and VOMS is being used.



## JasperReports Server Modifications

1. Edit the following values in the applicationContext-externalAuth-oAuth.xml file:

Key	XML Tag Name(s) to Update	Value
[KEYCLOAK_URL]	<authorization_location> <token_location> <userdetails_location> <logoutUrl>	URL of the Keycloak server. Example: <a href="https://sso-dev.stchome.com/">https://sso-dev.stchome.com/</a>
[KEYCLOAK_REALM]	<authorization_location> <token_location> <userdetails_location> <logoutUrl>	Keycloak realm that the client belongs to. This value needs to be changed, along with <keycloak_URL>.  In this example, the realm name is <i>Dev-Integration</i> : <a href="https://sso-dev.stchome.com/auth/realms/Dev-Integration">https://sso-dev.stchome.com/auth/realms/Dev-Integration</a>
[JASPERSERVER_URL]	<property name="redirecturl"> <property name="logoutUrl">	URL of the Jasper server. Example: <a href="http://&lt;server_name&gt;:8080/jasperserver-pro/oauth">http://&lt;server_name&gt;:8080/jasperserver-pro/oauth</a>
[CLIENT_ID]	<property name="client_id">	Client ID as set on Keycloak. Example: <property name="client_id"> <value>jasper-aws-dev</value>
[CLIENT_SECRET]	<property name="clientsecret"> <property name="userdetails_secret">	Credentials secret key generated by Keycloak.
State_ID	<property name="state">	This is the global setting used to populate the STATE_ID attribute in Jaspersoft. Example: <bean id="oAuthUserDetailsService" class="com.jaspersoft.jasperserver.ps.OAuth.OAuthUserDetailsServiceImpl"> <property name="state"> <value>WA</value> </property> </bean>
Jaspersoft Roles	<bean id="mtExternalUserSetupProcessor" class="com.jaspersoft.jasperserver.multipleTenancy.security.externalAuth.processors.MTExternal	All the Jaspersoft Roles are configured inside this tag. If any new Jaspersoft Roles are needed, they must be configured here. In the <entry> tag, the key value should match with the client role defined at the Keycloak end.  Currently, the following roles are configured:

Key	XML Tag Name(s) to Value Update	
	<pre> UserSetupProcessor" parent="abstractExternalProcessor"&gt; &lt;property name="organizationRoleMap"&gt; &lt;map&gt; &lt;!-- Example of mapping customer roles to JRS roles --&gt; &lt;entry&gt; &lt;key&gt; &lt;value&gt;ROLE_ADMIN_EXTERNAL_ORGANIZATION&lt;/value&gt; &lt;/key&gt; &lt;value&gt;ROLE_ADMINISTRATOR&lt;/value&gt; &lt;/entry&gt; &lt;/map&gt; </pre>	1. Administrator 2. Superuser 3. User Role

2. Copy the applicationContext-externalAuth-oAuth.xml file (edited in Step 1) to <JASPERSERVER\_DIR>/apache-tomcat/webapps/jasperserver-pro/WEB-INF.
3. Copy stc-jaspersoft-oauth-1.0.0.jar (available in the JRS distribution folder) to <JASPERSERVER\_DIR>/apache-tomcat/webapps/jasperserver-pro/WEB-INF/lib.
4. Create and save a backup of the <JASPERSERVER\_DIR>/apache-tomcat/webapps/jasperserver-pro/WEB-INF/applicationContext-security.xml file.
5. In <JASPERSERVER\_DIR>/apache-tomcat/webapps/jasperserver-pro/WEB-INF/applicationContext-security.xml, replace the access value for the method `com.jaspersoft.jasperserver.api.metadata.user.service.ProfileAttributeService.putProfileAttribute` with **ROLE\_USER**.
6. Save a backup copy of the <JASPERSERVER\_DIR>/apache-tomcat/webapps/jasperserver-pro/WEB-INF/applicationContext-security-web.xml file again and replace the constructor-arg value for `org.springframework.security.web.authentication.LoginUrlAuthenticationEntryPoint` with **/oauth**.
7. Add the SSL certificate used by Keycloak to the Java installation that Jaspersoft is using. (By default, Java only knows about a small number of root certificates.) To do this, follow these steps:

- a. Copy `InstallCert$SavingTrustManager.class` and `InstallCert.class` (both available in the `STC Suite Distribution/Server Components/JRS` directory) to the `<JASPERSERVER_DIR>/java/bin` directory.
- b. NOTE for `sso-dev.stchome.com`: This is only for Dev SSO SSL certificate installation. This URL changes based on your server hostname of the Keycloak/SSO server.
- c. Go to the `<JASPERSERVER_DIR>/java/bin` directory and execute these commands:

```
sudo ./java InstallCert sso-dev.stchome.com
sudo ./keytool -exportcert -alias sso-dev.stchome.com-1 -keystore
jssecacerts -storepass changeit -file sso-dev.stchome.com.cer
sudo ./keytool -importcert -alias sso-dev.stchome.com -keystore
../lib/security/cacerts -storepass changeit -file sso-
dev.stchome.com.cer
```

8. Make database changes with the following commands. Jaspersoft stores all of its metadata in the Postgres database. All of the user-based profile attributes are stored in the `jiprofileattribute` table in Jaspersoft. By default, user attributes support a character size of 200. In Step E below, the data type size is changed from 200 to 1,000.
  - a. Navigate to the `<Jasper Installation Directory>/postgres` directory.
  - b. Run this command: `sudo bin/psql -U postgres -W` (the password is `postgres`).
  - c. Now you should see at the prompt: `postgres=#`
  - d. Enter this command to connect to the Jasperserver database in Postgres: `\c jasperserver;` (the password is `postgres`).
  - e. Execute this SQL alter script: `ALTER TABLE jiprofileattribute ALTER COLUMN attrvalue TYPE character varying(100000);`
9. Restart the Jasper server and navigate to `JasperUrl/oauth` (see example). You should now be redirected to Keycloak to log in. Example:  
`http://52.10.228.158:8080/jasperserver-pro/oauth`

## Steps to Debug Issues Related to Keycloak/JasperReports Server Integration

If there are any issues with integrating Keycloak with Jasper, follow these suggestions below.

### Check the `applicationContext-externalAuth-oAuth.xml` File

Make sure that `applicationContext-externalAuth-oAuth.xml` is configured with the correct Keycloak and Jasper server parameters and with the correct `client_secret`.

## Keycloak Mappers

Make sure that the Jasper client has the below mappers mapped correctly in Keycloak, and check if the Org/fac List mapper contains the correct parameters. (Note that your API-KEY and API-URI will differ from the image below.)

Org/fac List

Protocol ? openid-connect

ID fce1efb4-6796-4106-824d-2549b87be6ab

Name ? org/fac list

Consent Required ? ☐ OFF

Mapper Type ? Org/fac list

Token Claim Name ? org-fac

API-KEY ? 645645

API-URI ? http://20.0.0.9:8080/iweb/api/v1/OrgFac/

Response format ? application/json ▼

[Save](#) [Cancel](#)

Name	Category	Type
org/fac list	Token mapper	Org/fac list
email	Token mapper	User Property
groups	Token mapper	Group Membership
username	Token mapper	User Property
realm roles	Token mapper	Realm Role List
roles	Token mapper	Client Role List
given name	Token mapper	User Property
family name	Token mapper	User Property
full name	Token mapper	User's full name

## Validate the IWeb Web Service

Make sure that the IWeb web service URL is accessible. The output of this should return the org/fac list. If there is an error, it needs to be fixed.



### Check the Whitelist Rules

If Jaspersoft is installed in an AWS environment, the outbound connection on port 8080 should be enabled for the IWeb server.

If Keycloak is installed in an AWS environment, the outbound connection on port 8080 should also be enabled for the IWeb server.

### Check the Firewall Rules

If there are any special firewall rules preventing the Jasper and/or Keycloak servers from accessing IWeb through port 8080, the need to be fixed so that the port is enabled.

## JasperReports Server Upgrade - Linux

These instructions are only required when deploying SMaRT AFIX for the first time or when upgrading from a version of SMaRT AFIX older than 1.17.4. If you have already deployed SMaRT AFIX 1.17.4, you should already have the web service plugin installed on your JasperReports server and can skip these instructions.

As a part of SMaRT AFIX 1.17.4, the new SMaRT AFIX Online Tool web service was introduced to help support the CDC's AFIX Online Tool application. In order to integrate this tool with SMaRT AFIX, a plugin must be added to the existing JasperReports server.

### Prerequisites

1. JasperReports server has been installed.
2. The web service plugin zip file has been downloaded to your application server (APP) and the contents extracted. The unzipped folder is referenced as \$WS\_DS from this point on.

```
/APP/JRS/webservices_v1.0_3.zip
```

3. Locate your JasperReports server web application folder, which is referred to as \$JRS\_HOME from this point on. It is recommended that you back up this folder before beginning the plugin installation.

```
/opt/jasperreports-server-6.2.1/apache-tomcat/webapps/jasperserver-pro
```

## Plugin Installation Steps

The installation should be performed as root user.

1. Stop your web server running JasperReports server.
2. Open the folder `$WS_DS/JRS/WEB-INF/bundles` and copy the contents to `$JRS_HOME/WEB-INF/bundles/`. Note that this should not overwrite any existing files.

```
cd /$WS_DS/JRS/WEB-INF/bundles/  
cp * /$JRS_HOME/WEB-INF/bundles/
```

3. Open the folder `$WS_DS/JRS/WEB-INF/lib` and copy the contents to `$JRS_HOME/WEB-INF/lib/`. Note that this should not overwrite any existing files.

```
cd /$WS_DS/JRS/WEB-INF/lib/  
cp * /$JRS_HOME/WEB-INF/lib/
```

4. Open the `$WS_DS/JRS/WEB-INF/` folder and copy the `applicationContext-WebServiceDataSource.xml` file to `$JRS_HOME/WEB-INF/`. Note that this should not overwrite any existing files.

```
cd /$WS_DS/JRS/WEB-INF/  
cp applicationContext-WebServiceDataSource.xml /$JRS_HOME/WEB-INF/
```

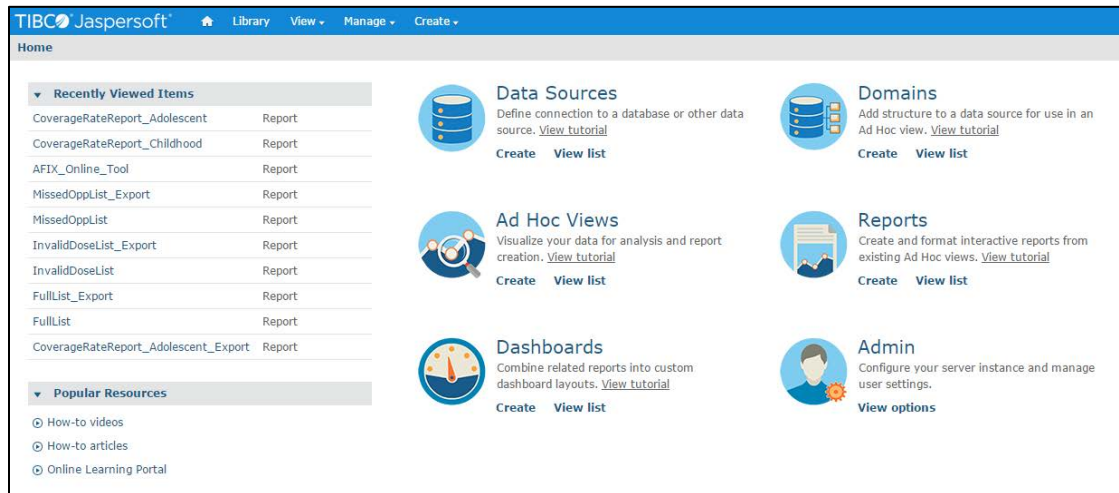
5. Restart the web server running JasperReports server.

## Validation Steps

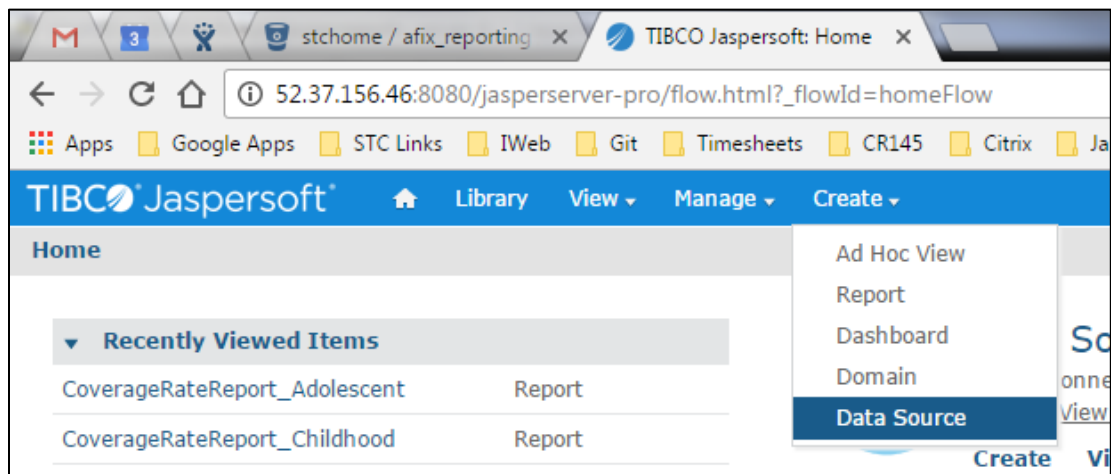
Follow these steps to confirm that the plugin has been successfully installed:

1. Navigate to your JasperReports server admin console.

2. Log in as an admin-level user.



3. Select **Create > Data Source** from the top menu.



4. Confirm that **Web Service Data Source** is listed in the Type drop-down list.

The screenshot shows the TIBCO JasperSoft web interface for creating a new data source. The page title is 'New Data Source'. The main heading is 'Set Data Source Type and Properties'. Below this, a instruction states: 'First, select the type of data source you wish to add, then enter the required property values.' The 'Type' dropdown menu is open, displaying a list of data source types. 'Web Service Data Source' is highlighted in blue. Other visible options are AWS Data Source, Bean Data Source, Cassandra Data Source, Internal Diagnostic Data Source, JDBC Data Source, JNDI Data Source, MongoDB Data Source, MongoDB JDBC Data Source, Virtual Data Source, and Web Service Data Source. The 'Auth Ty' field is set to 'none'. The 'Language' field is set to 'json'. The 'Request Verb' field is set to 'post'. The 'Web Service URI' field contains the text 'superuser'. The 'Password' field is masked with dots. The 'Username' field is empty.

## SMaRT AFIX JasperReports Deployment - Linux

The following outlines how to import (migrate) Jaspersoft Reports for SMaRT AFIX.

### Pre-Migration Checklist

- Confirm that the Postgres database is installed and configured
- Retrieve the passwords for the SMaRT AFIX database (*afixdb*)
- Retrieve the Jaspersoft superuser username and password
- Confirm that the SMaRT AFIX Online Tool web service is installed



- Confirm that all necessary ports are open across all firewalls (the default port is 80)
- Confirm that the release distribution zip file for Jasper Reports is extracted from /APP/JRS/AFIX\_Reports-[version number].zip and copied to your local drive.
- **Important:** Be sure to update the JasperReports server by following the instructions in [SMaRT AFIX JasperReports Server Upgrade - Linux](#).

## Procedure Steps

Follow these steps to deploy Jaspersoft Reports.

### Export the Jaspersoft Repository for Backup

Export the repository by selecting **Manage > Server Settings > Export (Export Everything)** in Jaspersoft. Save the file as a backup.

The screenshot shows the TIBCO JasperSoft web interface. The top navigation bar includes 'Library', 'View', 'Manage', and 'Create'. The left sidebar shows 'Settings' with a sub-menu where 'Export' is selected. The main content area is titled 'Export' and contains the following sections:

- File Properties:** A text field for 'Export Data File Name (required):' with the value 'export.zip'.
- Export Options:** A checkbox labeled 'Export Everything' which is checked.
- Roles and Users to Export:** Three radio buttons: 'Selected roles and users' (selected), 'Users with selected roles', and 'Roles with selected users'. Below these are two searchable lists:
  - Roles:** A list containing ROLE\_ADMINISTRATOR, ROLE\_ANONYMOUS, ROLE\_DEMO, ROLE\_PORTLET, ROLE\_SUPERMART\_MANAGER, ROLE\_SUPERUSER, and ROLE\_USER. A 'Select All Roles' button is at the bottom.
  - Users:** A list containing 104user, 2centeruser, amy\_int, amy\_prov, amy\_rc, anarayan, and andadminqa0. A 'Select All Users' button is at the bottom.
- Resources to Export:** Three checked checkboxes: Data Sources, Domains, and Ad Hoc Views.
- Assets to Export:** Three checked checkboxes: Sub-organizations, Dependencies, and Permissions.
- Events to Export:** Three unchecked checkboxes: Access Events, Audit Events, and Monitoring Events.

An 'Export' button is located at the bottom left of the main content area.

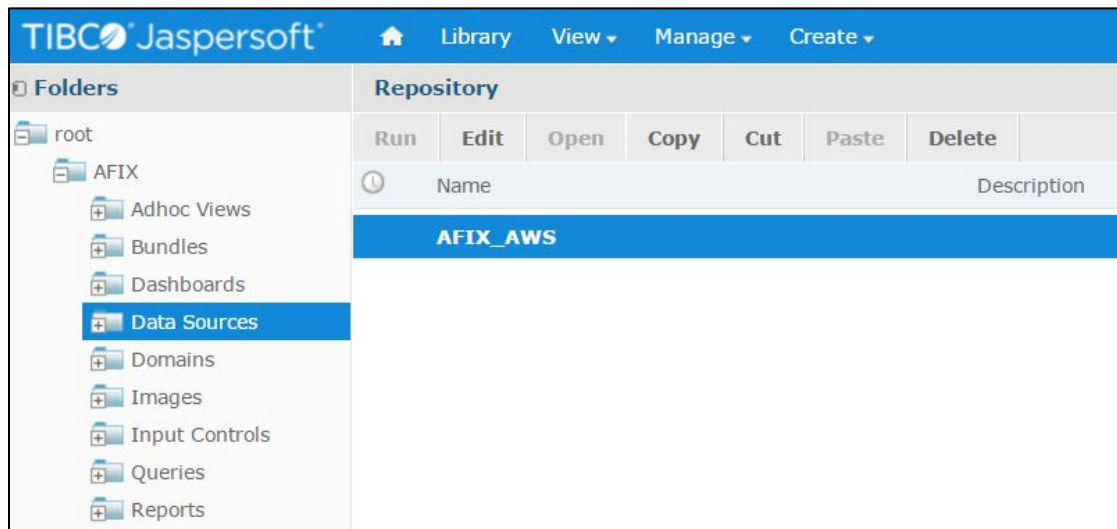
### Import the Content via the Portal

1. Log in to the Jaspersoft BI Portal as the administrator user.
2. Navigate to **Server Settings > Import**.

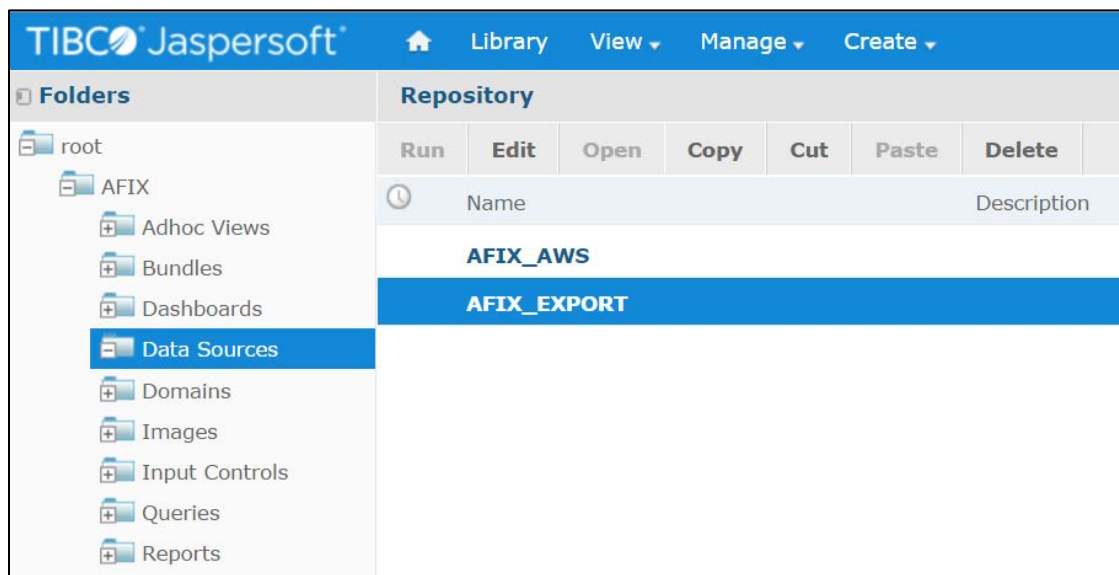
3. Import the AFIX\_Reports-[version number].zip file.
4. Update the data source with the database connection information.

## Import the Content via the Command Line

1. Confirm that JAVA\_HOME is set and your path includes jre\bin or jdk\bin.
2. Change to the buildomatic directory on the JasperReports server:  
C:\Jaspersoft\jasperreports-server-6.2.1\buildomatic
3. Execute the migrate command (adding in the correct version number):  
js-import.sh --input-zip "AFIX\_Reports-[version number].zip" --update --skip-user-update --include-access-events --include-audit-events --include-monitoring-events
4. Update the data source with the database connection information: From the left menu, go to **root > AFIX > Data Sources**. Select **AFIX\_AWS**, then click the Edit tab. Specify your database connection properties for Host, Port, and Password, then click **Save**.



5. Select **AFIX\_EXPORT**, then click the Edit tab. This is the web service data source linked to the SMaRT AFIX Online Tool web service.



6. Leave the defaults for Auth Type, Language, and Request Verb. Update the web service URI to point to your SMaRT AFIX Online Tool web service deployment. Note that even though the Password field is populated, no password is present or required; leave it as it is. Click **Save** when finished.

Edit Data Source: AFIX\_EXPORT

### Set Data Source Type and Properties

First, select the type of data source you wish to add, then enter the required property values.

Type:

Auth Type:

Language:

Request Verb:

Web Service URI:

Password:

Username:

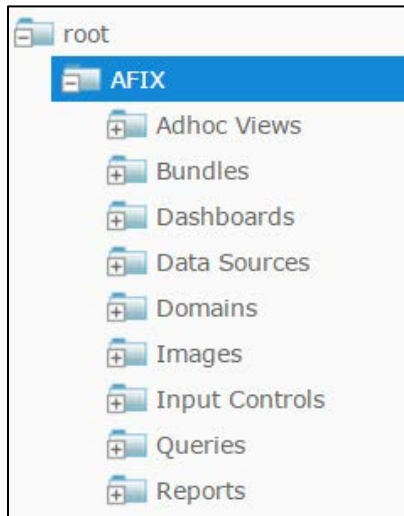
Save

Cancel

## Validate the New Content

The following steps perform a spot check on the newly created content to validate it and to check for any serious errors. It does not perform a full check of all possible issues and should be followed up with a functional validation of the content.

1. Log on to the Jaspersoft BI server as a user able to run a report. The user should be able to log in successfully and see the subfolders under `/root/AFIX` (select **View > Repositories**).



2. Validate that the user can execute and view a report as defined by their class or organization membership: Select the report from `AFIX/Reports/AFIX_Online_Tool`, select one report from any of the other sub-directories of `AFIX/Reports`, and confirm that both reports execute successfully.

### **Restore the Previous Content (if Necessary)**

If there are any uncorrectable issues and the release upgrade needs to be aborted, follow these steps to revert to the previous content:

1. Using the backup exported at the beginning of these steps, import using the steps above. Note that a re-import of the previous version of the content will also achieve the same back-out.
2. Perform the validation steps listed above.

## **Node.js Installation - Linux**

Follow these steps to install Node.js on Linux.

1. Create the user environment: A user needs to be created to run Node.js applications. However, it is not recommended that Node.js applications be run as a privileged user.

```
sudo adduser node
```

2. Become the node user:

```
sudo su - node
```

3. To install Node.js for the previously created node user, Node Version Manager is recommended. This allows for more flexible control over the environment and an easier future upgrade path.

```
curl -o-  
https://raw.githubusercontent.com/creationix/nvm/v0.32.1/install.sh |  
bash  
source ~/.bashrc
```

4. Install the required version of Node.js:

```
nvm install 6.9.1  
nvm use 6.9.1  
nvm alias default 6.9.1
```

5. Install the PM2 node process manager:

```
npm install -g pm2
```

## SMaRT AFIX Application Installation Instructions - Linux

The following instructions explain how to install the application, the Oracle Instant Client, and Redis; how to configure the application dashboard and quick links; specific configuration options; and information on standalone versus multiple application deployment.

If you are upgrading from a previously installed version of SMaRT AFIX, you can skip directly to the [Install the Deployment Package](#) section and continue from there.

### Prerequisites

The following should already be installed and configured:

- Linux CentOS 7
- PostgreSQL server (DBB)
- Oracle server (COR)
- Node.js (APP)
- PM2 (APP)

### Installation and Deployment of SMaRT AFIX, iQ, and VOMS

If you are installing SMaRT AFIX alongside the iQ and/or VOMS applications, you only need to install the Oracle Instant Client and Redis with the first application installation.

Once these are installed, for subsequent applications that are running on the same server, you can skip down to the [Install the Deployment Package](#) section and continue from there instead.

## Install the Oracle Instant Client

1. Download and install the Oracle Instant Client (both basic and SDK). The .rpm files can be found at <http://www.oracle.com/technetwork/topics/linuxx86-64soft-092277.html>. Install them with the RPM command.
2. Add the following to the users: .bashrc, .cshrc, and .zshrc, or use the default per-interactive-shell startup file of the default shell of the user for which you want to run the application. Optionally, instead of adding them on a per-user basis, the following can be added to /etc/profile or /etc/profile.d/oracle.sh:

```
export OCI_LIB_DIR=/usr/lib/oracle/12.1/client64/lib
export OCI_INC_DIR=/usr/include/oracle/12.1/client64
```

3. Create a file in /etc/ld.so.conf.d/oracle.conf with the path to the Oracle Instant Client libraries, which by default are as follows:

```
/usr/lib/oracle/12.1/client64/lib
```

## Install Redis

When installing Redis, make sure epel repo is enabled:

```
yum install redis
systemctl enable redis
systemctl start redis
```

## Install the Deployment Package

Copy the provided zip/tar file to the target server. Extract the archive and change into the parent of the directory where it was extracted.

## Configure the Application Dashboard and Quick Links

If you are installing SMaRT AFIX alongside the iQ and/or VOMS applications, the steps below only need to be completed the first time an application is installed. This file should be saved for all subsequent installations.

1. Download the apps.json file from the release distribution application components shared folder.
2. Edit this file with a text editor and replace the placeholders DASHBOARD\_URL, IWEB\_URL, AFIX\_URL, PHC-HUB\_URL, IQ\_URL, and VOMS\_URL (if applicable for your installation) with their respective URLs.

3. Save this file and keep it handy as you will need to use it in the installation of iQ, VOMS, and the SSO dashboard.

An example of one such configuration object in the JSON file is shown below. In most cases, only the URL value needs to change:

```
{
  "icon": "/static/public/img/STC - SmartAFIX.svg",
  "id": "AFIX",
  "name": "SMaRT AFIX",
  "url": "https://afix.stchome.com ",
  "description": "Utilized to make AFIX assessments efficient, standardized and meaningful.",
  "hideIfUnavailable": true,
  "accessRole": "Access_afix"
}
```

Copy this file to the following location:

```
<application_install_dir>/src/shared/helpers/appActions/
```

## Configure the Reverse Proxy

A reverse proxy is recommended to provide access to the various products. This is not explicitly required unless the products are running with the `ENABLE_SSL` option set to `true`. However, this will generally be the case when the products are being run in conjunction with IWeb on the same server. See the example Apache configurations at `package/docs/apache`.

## General Product Configuration Options

Once the package containing the products has been installed, there are some configuration options that can be set depending on the environment. The majority of these lie in `package/process.json`, which is simply a JSON configuration file for pm2. The options listed in bold below need to be changed to match your environment. Other options not in bold might not need to change, and in most cases can be the default setting. Some options in the `process.json` file are not listed at all below; those options should be left unchanged.

The options are as follows:

Option	Description
script	Location of the startup script application. The path to the script may need to be customized.
cwd	The path to the application. May need to be customized.
PRODUCT	The name of the product.
<b>HOST</b>	The host name for the product.
APIHOST	The host name of the product's respective API server (generally



Option	Description
	<i>localhost</i> ).
PORT	The port for the product.
APIPORT	The port for the product's API server.
NODE_ENV	This should always be <b>production</b> .
SAML_ISSUER	The SAML issuer (client) from Keycloak.
SAML_ENTRY_POINT	The SAML entry point from Keycloak.
JASPER_SERVER	The domain name of the JasperReports server.
REDIS_URL	The Redis URL used for storing client sessions.
REVERSE_PROXY	When configuring SMaRT AFIX with a reverse proxy, this should be set to <i>true</i> .
ENABLE_SSL	When set to <i>true</i> , this enables HTTPS support. If REVERSE_PROXY is set to <i>true</i> , this should be set to <i>false</i> even when the environment is configured for HTTPS.
SECRET_SESSION	The secret key for session storage. <b>IMPORTANT NOTE:</b> This value must be exactly the same for every application, in both the server and the API environment variables.

## SMaRT AFIX-Specific Configuration Options

The following options are specific to SMaRT AFIX configuration settings:

Option	Description
VOMS_ORACLE_USER	The username for IWeb's SIIS database. This is set to the default user for the SIIS, but may need to be updated depending on your configuration.
VOMS_ORACLE_PASSWORD	The password for IWeb's SIIS database. This is set to the default password for the SIIS, but may need to be updated depending on your configuration.
VOMS_ORACLE_CONNECTION	Connection information for IWeb's SIIS database. This needs to be updated to point to your IWeb's Oracle database instance.
PG_USER	The user account for the SMaRT AFIX PostgreSQL database.
PG_PASSWORD	The password for the associated PG_USER for the SMaRT AFIX PostgreSQL database.
PG_HOST	The hostname for the SMaRT AFIX PostgreSQL database.
PG_PORT	The port number for the SMaRT AFIX PostgreSQL database.
AFIX_EXPORT_URI	The URL for the SMaRT AFIX Online Tool web service. Only the hostname and possibly the port number for the URL need to be updated.

Option	Description
<b>AFIX_EXPORT_KEY</b>	The API Key for the SMaRT AFIX Online Tool web service. This should be left as the default.
<b>CDSI_FORECASTER_VERSION</b>	The current version of the CDSI Forecaster deployed. For the SMaRT AFIX 1.17.5.4 release, it should be set to <b>5.17.10</b> .
<b>API_URL_PREFIX</b>	This should be set to <b>/api</b>

## SMaRT AFIX for Independent States-Specific Options

These options are used for independent builds of SMaRT AFIX (i.e., not connected to IWeb) only and should be left unchanged for builds involving IWeb.

Option	Description
<b>API_URL_PREFIX</b>	This sets the API prefix for independent mappers.
<b>MANAGE_URL_PREFIX</b>	This sets the Manage Users page URL.
<b>IS_INDEPENDENT</b>	When this option is set to <i>true</i> , it enables independent build functions.
<b>MANAGE_USER_EMAIL</b>	This enables the password reset functionality for the Manage Users page.
<b>SERVICE_API</b>	This enables custom report template sharing for independent SMaRT AFIX. It should be set to <b>api/orgFacSearch</b> .

**NOTE:** Due to variations in the org-fac-micro-service between the different applications (SMaRT AFIX, VOMS, and IQ), it is recommended that you deploy the service that is bundled with SMaRT AFIX instead of the one bundled with other applications.

## Run the Application

Use pm2 to run the deployment package as shown below. In many cases, environment-specific configuration options must be set prior to running an application's package. See the configuration option sections above for more details.

```
pm2 start package-parent/process.json
```

## Start the Products upon Bootup

To have the products automatically start on every boot, do the following once it has been verified that they are running correctly:

```
pm2 save
pm2 startup
```

# Windows Instructions

The following instructions are for the Windows operating system.

## Forecaster Installation Instructions - Windows

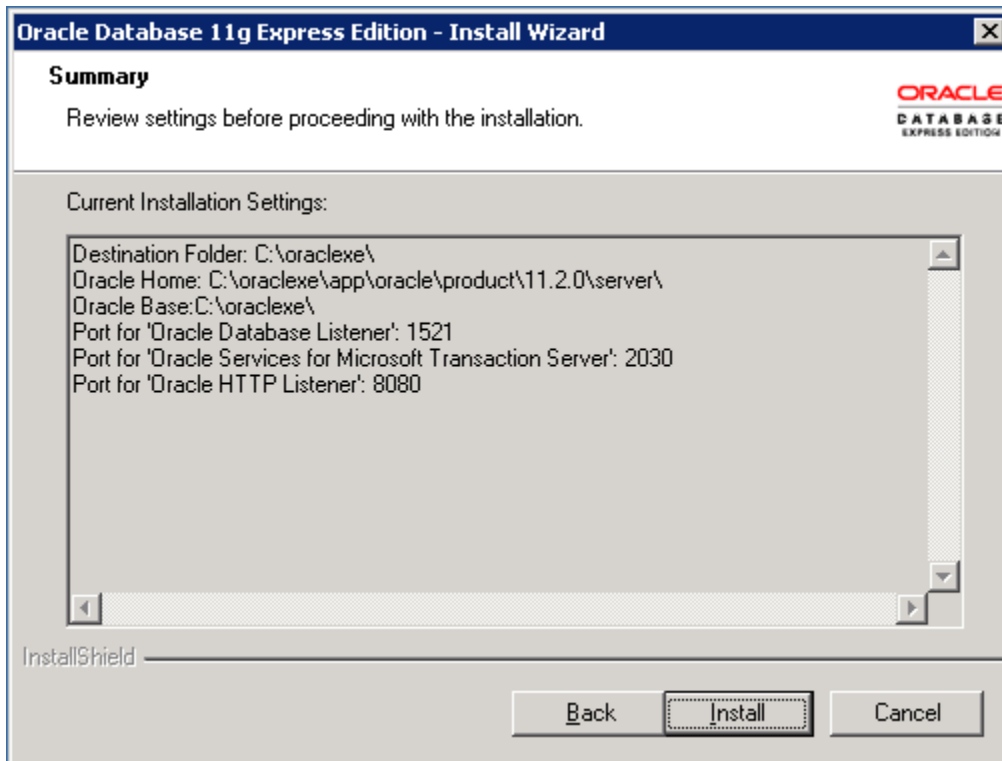
The installation of the Standalone Forecaster (SAF) is composed of three major tasks: install Oracle Express, install the SAF database into Oracle Express, and install the Forecaster web application into Tomcat. All three components are installed on the *Service* machine (SVC).

SAF can be installed to Oracle 11g or Oracle Express 11g. The Oracle product you choose will depend on your state's licensing. Oracle Express 11g is free to use for this type of installation. All performance testing, etc., for SAF has been conducted using Oracle Express. These instructions only cover the installation of Oracle Express 11g.

### Install Oracle Express

1. If necessary, create an Oracle account at <http://www.oracle.com>.
2. If using Oracle Express (free), download the appropriate version. The Windows version is approximately 312MB in size.
3. Unzip the downloaded file and run the `DISK1/setup.exe`. When using the installation wizard, the installer creates a database named XE. The installer uses these ports: TNS = 1521, MTS = 2030, HTTP = 8080.
4. There may be two error messages about a missing file named KEY\_XE.reg. Just acknowledge them and continue with the installation.
5. Disable the HTTP port by running the following at a command prompt after the installation is complete:

```
echo EXEC DBMS_XDB.SETHTTPPORT(0); | sqlplus / as sysdba
```



## Install the SAF Database (New Installation)

Database objects are created with 5.16.9 CDSi install version.

1. Navigate to the  
/SVC/OXE/db/AFIX\_CDSI\_Install/AFIX\_CDSI\_v5.16.9\_Install/ directory.
2. Run Install.bat.
3. Navigate to the /SVC/OXE/db/Patches/patch\_v5\_17\_CDSI directory.
4. Run the forecast.bat script.
5. Navigate to the /SVC/OXE/db/Patches/patch\_v5\_18\_CDSI directory.
6. Run the forecast.bat script.

## Run Database Patches (Upgrades)

1. Navigate to the /SVC/OXE/db/Patches/patch\_v5\_17\_CDSI directory.
2. Run the forecast.bat script.

## Install the Web Application

Before installing the SMaRT AFIX web application, Java 7 must be installed on the SVC server and Tomcat 7.0 must also be installed and running on the SVC server.



1. Edit the `conf/context.xml` file - Add the lines below (between the `<Context>``</Context>` tags) to the `CATALINA_HOME/conf/context.xml` file. The added lines should be placed within the `<Context>``</Context>` tags in the file.

```
<Context>
  <Resource name="jdbc/com/stc/forecaster"
    auth="Container"
    type="javax.sql.DataSource"
    driverClassName="oracle.jdbc.OracleDriver"
    url="jdbc:oracle:thin:@localhost:1521/XE"
    username="SAFUSER"
    password="SAF"
    maxActive="100"
    maxIdle="10"
    maxWait="-1" />
</Context>
```

2. Copy the `/SVC/SAF/forecaster.war` to `webapps/forecaster.war` under your Tomcat directory.
3. Restart Tomcat.
4. Set the number of threads to the number of processor cores available on your server - Edit `$CATALINA_HOME/webapps/forecaster/WEB-INF/spring-ws-servlet.xml` and set the thread count (see the second line of code below):

```
<bean id="forecastingEndpoint12"
class="com.stchome.saf.ws.endpoint.ForecasterServiceEndpoint12"
scope="prototype">
  <constructor-arg value="1" /><!-- Thread count -->
  <constructor-arg value="60" /><!-- Thread pool termination timeout in
seconds-->
</bean>
```

5. Restart Tomcat.
6. Verify the application is running correctly by navigating to `http://[YOUR SERVER]/forecaster`. The UI displays if the application was successfully installed and configured.

Forecasting Settings SOAP WSDL Tester

### Forecasting Settings

#### Vaccine Family Settings Save

Vaccine Family	Suppress Dose1 Forecast	Vaccination Grace Period	Minimum Display Age	Maximum Patient Age	
MENINGOCOCCAL B, OMV	<input checked="" type="checkbox"/>	4 ▼			Dose 1
DTaP/DT/Td/Tdap	<input type="checkbox"/>	4 ▼			Dose 1
HIB	<input type="checkbox"/>	4 ▼			Dose 1
POLIO	<input type="checkbox"/>	4 ▼			Dose 1
HEP-B 3 DOSE	<input type="checkbox"/>	4 ▼			Dose 1
MMR	<input type="checkbox"/>	4 ▼			Dose 1
VARICELLA	<input type="checkbox"/>	4 ▼			Dose 1
MENINGOCOCCAL	<input type="checkbox"/>	4 ▼			Dose 1
HEP-A	<input type="checkbox"/>	4 ▼			Dose 1
FLU	<input type="checkbox"/>	4 ▼			Dose 1
PNEUMO (PCV)	<input type="checkbox"/>	4 ▼			Dose 1
HEP-B 2 DOSE	<input type="checkbox"/>	4 ▼			Dose 1
MEASLES	<input checked="" type="checkbox"/>	4 ▼			Dose 1
MUMPS	<input checked="" type="checkbox"/>	4 ▼			Dose 1
RUBELLA	<input checked="" type="checkbox"/>	4 ▼			Dose 1
PNEUMO (PPSV)	<input type="checkbox"/>	4 ▼			Dose 1
ROTAVIRUS	<input type="checkbox"/>	4 ▼			Dose 1
HPV	<input type="checkbox"/>	4 ▼			Dose 1
HERPES ZOSTER	<input type="checkbox"/>	4 ▼			Dose 1

#### Vaccine Preferences by Dose to Override ACIP Schedule Recommendations Save

## Postgres Database Installation - Windows

The information below describes how to install the Postgres database on Windows Server 2008 R2 64-bit, as well as how to modify relevant Postgres server configuration settings for SMaRT AFIX.

### Install on Windows

The following information covers general installation instructions for installing PostgreSQL on Windows. Windows Server 2008 R2 64-bit was used as a reference, but installation on other versions of Windows should be similar.

1. Visit [this page](#) and download the latest 64-bit version of Postgres. Version 9.4.x was used for this installation example.

# Download PostgreSQL

*Please Note:* Cookies should be enabled for the download process to function correctly

Installer version **Version 9.5.2** [[Readme](#) file for customers interested in using PL/Perl, PL/Python or PL/Tcl]



Installer version **Version 9.4.7** [[Readme](#) file for customers interested in using PL/Perl, PL/Python or PL/Tcl]



2. Run the downloaded executable to start the installation. It is recommended to use the default installation directories, but they can be customized as needed (make note of the new locations).
3. Choose a password for the Postgres admin user *postgres* and store it securely for when administrative maintenance is required.
4. Use the default port 5432 (recommended). An alternate port can be used, but make sure to configure connecting applications to the Postgres database.
5. Use the default locale.
6. On the last step post installation, you can uncheck the *Stack Builder may be...* option and click **Finish**.

## Modify Postgres Server Configuration Settings

Some of the Postgres server configuration settings must be modified. If you used the default installation directory, the following file reference locations should be located in the directory path:

```
C:\Program Files\PostgreSQL\9.4\data\
```

1. Edit the `pg_hba.conf` file to allow connections from other STC servers/applications. Copy/paste the following line:

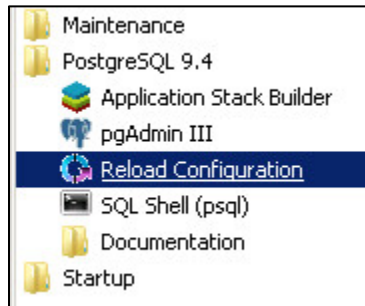
```
host    all        all        127.0.0.1/32    md5
```

to make the file look something like the following. Let's assume your internal subnet falls under 192.168.x.x, which would update the line to:

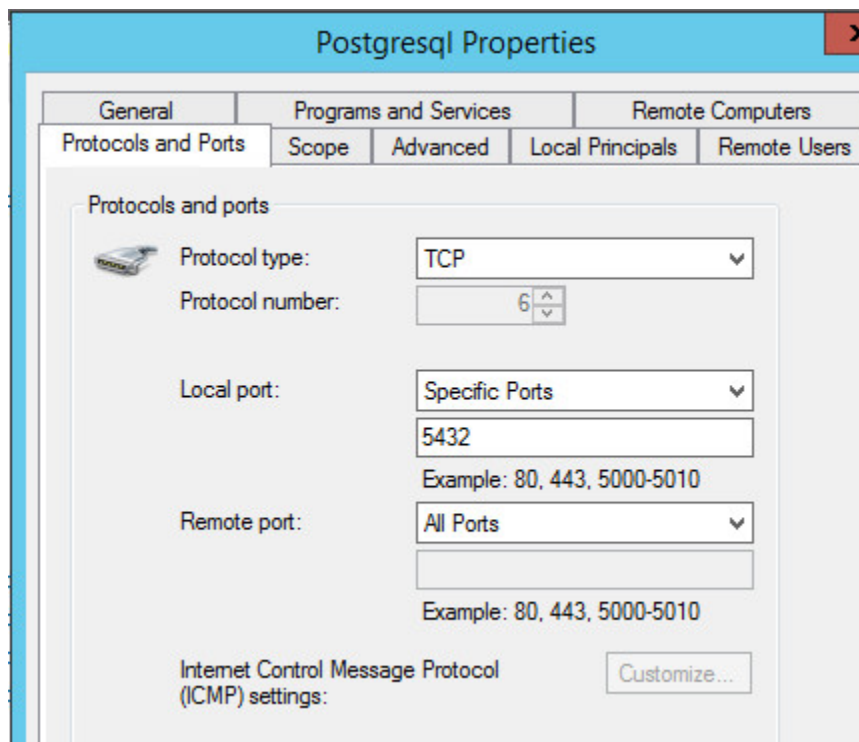
```
host    all        all        127.0.0.1/32    md5
host    all        all        192.168.0.0/16   md5
```

Save the changes. If you are technical and familiar enough with CIDR notation, you can further customize and restrict connection access as needed.

2. Trigger Postgres to reload with the new configuration changes by running **Reload Configuration**, found under PostgreSQL 9.4 in the Windows Start Menu:



3. Create a custom firewall rule to allow inbound connections on port 5432:



4. Complete the installation by initializing the database (see [SMaRT AFIX Database Initialization - Windows](#)).



# SMaRT AFIX Database Initialization - Windows

The information below describes how to initialize the database for the first time, how to upgrade/migrate an existing database, and how to set up daily jobs.

## Prerequisite Tasks

Perform the following tasks before initializing the database:

1. Confirm that PostgreSQL has been installed.
2. State-specific eligibility: If your state uses one or more state-specific codes for VFC eligibility, you will need to make a modification to the `/DBB/POSTGRES/sql/OLAP/OLAP_V1_0_2_R1_Afix_OLAP_Initial_Data.sql` file. Add the state-specific codes to the DIM\_VFC\_ELIGIBLE section as noted below. Be sure to increment the `vfc_eligible_key` value for each state-specific code you add. State-specific codes should be added exactly as they appear in your system database.

```
... --DB_script for DIM_VFC_ELIGIBLE---
INSERT INTO olap.dim_vfc_eligible(vfc_eligible_key,
vfc_eligible_code, created_ts)
VALUES (1, 'Not VFC Eligible-Underinsured', current_timestamp),
(2, 'VFC Eligible - State Specific Eligiblity',
current_timestamp),
(3, 'Local-Specific Eligiblity', current_timestamp),
(4, 'Not VFC Eligible', current_timestamp),
(5, 'American Indian/Alaska Native', current_timestamp),
(6, 'Uninsured', current_timestamp),
(7, 'Federally Qualified Health Center patient',
current_timestamp),
(8, 'Medicaid', current_timestamp),
--Add State Codes here----
(9, 'State Specific Code', current_timestamp),
(-1, 'Unknown', current_timestamp);
...
```

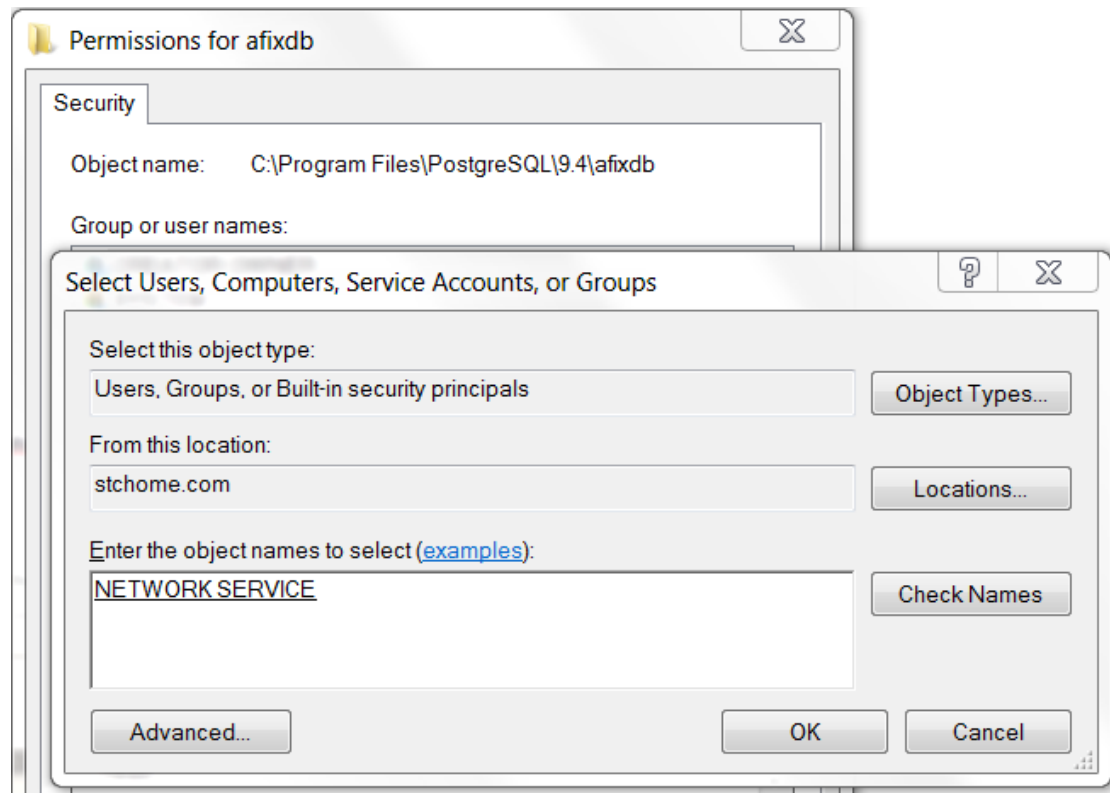
## Initialize a New Database (for the First Time Only)

If this is the first time you are initializing the database, follow the steps below. Otherwise, see the [Upgrade/Migrate an Existing Database](#) instructions.

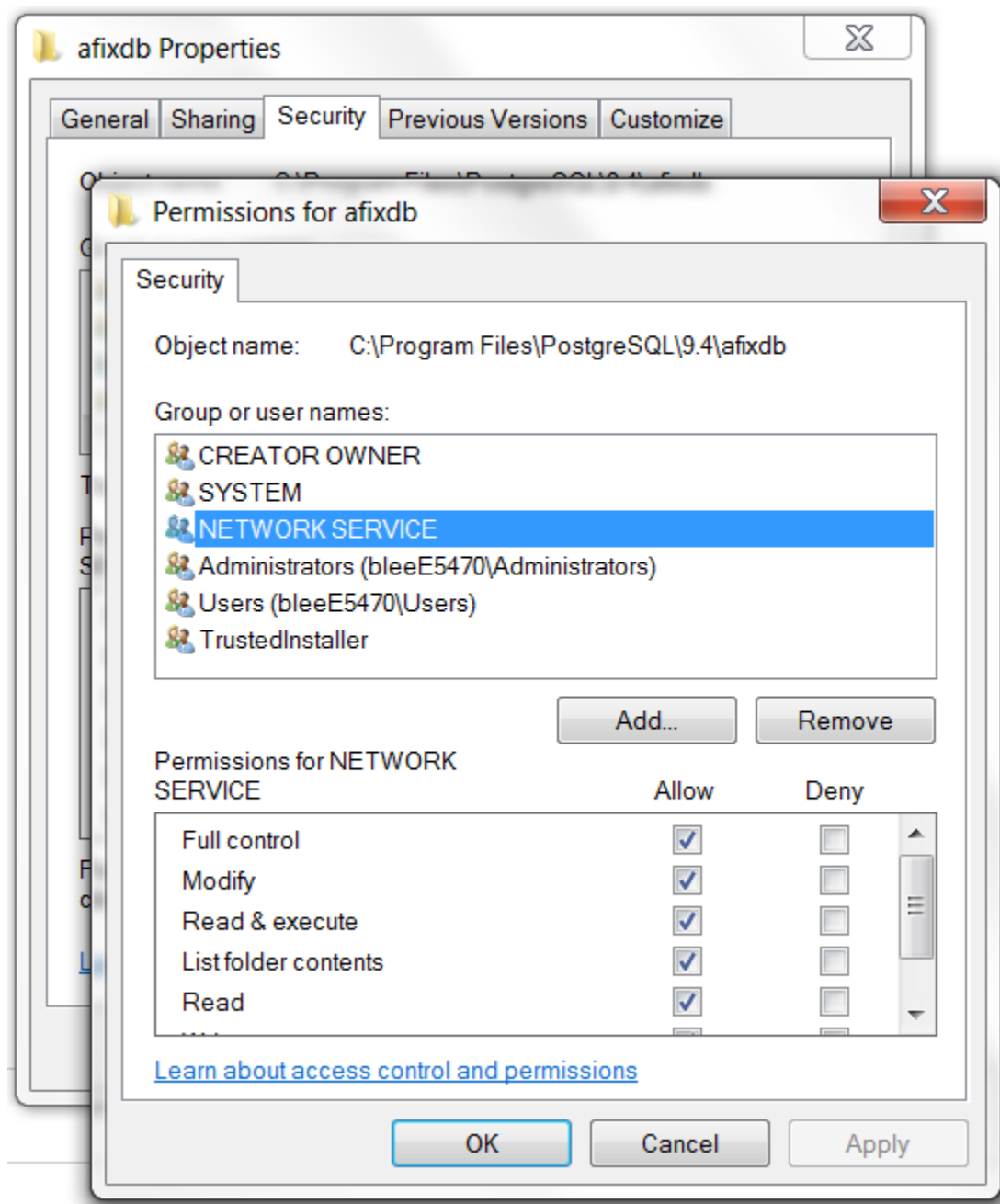
1. Create a tablespace folder - Use Windows Explorer to create the directory for the tablespace to be used by SMaRT AFIX. Navigate to the folder `C:\Program Files\PostgreSQL\9.4`, click the **New Folder** button, and name the new folder *afixdb*.
2. Set the folder permissions for *afixdb* - In Windows Explorer, right-click on the *afixdb* folder and select **Properties**. Click on the Security tab, then click the **Edit**

button and then the **Add** button. Enter the name *network service* and click on the **Check Names** button.

3. Your window should like the image below, although your location will be different and local to your network. Click **OK**.



4. Make sure NETWORK SERVICE is selected and that the Full Control option under the Allow column is selected. When finished, click **OK** for all of the remaining open windows to close them.



5. Create the data directory:

```
C:\Program Files\PostgreSQL\9.4\afixdb\data
```

6. Create the olapdata directory:

```
C:\Program Files\PostgreSQL\9.4\afixdb\olapdata
```

7. Download the release distribution zip file and extract the database scripts for the database server in the afixdb folder:

```
\DBB\POSTGRES
```

8. Create the afixdb by navigating to the /DBB/POSTGRES directory and executing the following command. If prompted, enter the password that was entered during the Postgres installation.

```
"c:\Program Files\PostgreSQL\9.4\bin\psql.exe" -Upostgres -f  
setup_database_win.sql
```

9. Create the database users and roles by navigating to the /DBB/POSTGRES directory and executing the following command. If prompted, enter the password that was entered during the Postgres installation.

```
"c:\Program Files\PostgreSQL\9.4\bin\psql.exe" -Upostgres -f  
setup_objects.sql afixdb
```

10. Create the APP configuration schema by navigating to the /DBB/POSTGRES directory and executing the following command. Enter the password **AfixQA**.

```
flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=app -  
sqlMigrationPrefix=APP_V -user=afix migrate
```

11. Create the ODS schema by navigating to the /DBB/POSTGRES directory and executing the following command. Enter the password **AfixQA**.

```
flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=ods -  
sqlMigrationPrefix=ODS_V -user=afix migrate
```

12. Create the OLAP schema by navigating to the /DBB/POSTGRES directory and executing the following command. Enter the password **AfixQA**.

```
flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=olap -  
sqlMigrationPrefix=OLAP_V -user=afix migrate
```

## Upgrade/Migrate an Existing Database

If this is not the first time you are initializing the database, follow the steps below. Otherwise, see the [Initialize a New Database \(for the First Time Only\)](#) instructions.

1. Migrate the APP configuration schema by navigating to the /DBB/POSTGRES directory and executing the following command. Enter the password **AfixQA**.

```
flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=app -  
sqlMigrationPrefix=APP_V -user=afix migrate
```

2. Migrate the ODS schema by navigating to the /DBB/POSTGRES directory and executing the following command. Enter the password **AfixQA**.

```
flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=ods -
```

```
sqlMigrationPrefix=ODS_V -user=afix migrate
```

3. Migrate the OLAP schema by navigating to the /DBB/POSTGRES directory and executing the following command. Enter the password **AfixQA**.

```
flyway -url=jdbc:postgresql://localhost:5432/afixdb -schemas=olap -  
sqlMigrationPrefix=OLAP_V -user=afix migrate
```

## Set Up a Daily Job / Drop Partition

1. Copy partition.sql and partition.bat from the /DBB/POSTGRES directory to C:\Program Files\PostgreSQL\9.4\afixdb.
2. Navigate to the /DBB/POSTGRES directory and execute this command:

```
copy partition.sql C:\Program Files\PostgreSQL\9.4\afixdb  
copy partition.bat C:\Program Files\PostgreSQL\9.4\afixdb
```

3. Create a Task Scheduler to run the C:\Program Files\PostgreSQL\9.4\afixdb\partition.bat script daily at 1:00 a.m. to create future partitions and drop old partitions.

## SMaRT AFIX Online Tool Web Service Installation - Windows

The SMaRT AFIX Online Tool web service is used by the SMaRT AFIX application to generate an XML file to be uploaded to the CDC's AFIX online tool application. The web service is a simple web application that is installed alongside the Stand Alone Forecaster on the Service machine (SVC).

### Prerequisites

1. The Postgres database is installed and configured.
2. The Postgres password for the SMaRT AFIX database is known.
3. The Tomcat instance is installed on the SVC server.
4. All necessary ports are open across all firewalls.
5. The release distribution file for the SMaRT AFIX Online Tool web service is extracted from /SVC/ONLINE\_TOOL/afix.export.ws.war and copied to your local drive.

### Installation Steps

1. Copy the afix.export.ws.war file to your Tomcat webapps folder.

2. Restart Tomcat.
3. Update the application properties to point to the proper Postgres database. Make sure the username and password are correct.
4. Edit the `$CATALINA_HOME/webapps/afix.export.ws/WEB-INF/app.properties` file:

```
driverClassName=org.postgresql.Driver
url=jdbc:postgresql://127.0.0.1:5432/afixdb
username=afixUser
password=afixPassword
```

5. Restart Tomcat.

## Jaspersoft ETL Installation - Windows

Follow these instructions to install Jaspersoft ETL, Apache Web Server, and Subversion, and to configure the administration console. This installation only needs to occur once.

### Prerequisites

1. Java JDK 8 (1.8.91) has been installed.
2. The environment variable `JAVA_HOME` has been set:

```
JAVA_HOME=[drive]:\directory\Java\1.8_91
```

3. Copy the components from the distribution `/Server Components/ETL` directory into your local directory. These files include:
  - `license.txt`
  - `TIBCOJaspersoft-JETL-Installer-20150908...zip`
  - `etl.zip`

### Install Jaspersoft ETL

1. Download the Jaspersoft ETL installer zip file and the license file:

```
Server Components\ETL\TIBCOJaspersoft-JETL-Installer-20150908_1633-
V6.0.1-installer.zip
Server Components\ETL\license.txt
```

2. Copy the installer and license file into a temporary directory:

```
c:\user\[user name]\Downloads
```

3. Unzip the installer into the temporary directory. Several files will be extracted. Keep all of the files in the temporary directory for the duration of the installation.
4. From the temporary directory, execute the Windows installer by clicking on:

```
TIBCOJaspersoft-JETL-Installer-20150908_1633-V6.0.1-windows-  
installer.exe
```

5. Follow the prompts to accept the license agreement.
6. Follow the prompts to specify the installation directory, installation type, and license file. Specify [drive:]\Jaspersoft\6.0.1 for the installation directory, **Easy Install** for the installation type, and license.txt (found in the temporary directory).
7. Click the **Next** button and wait until the installation finishes.
8. Click the **Start** button, search for services.msc, and then search for any service named TIBCO Jaspersoft Logserver Collector 6.0.1. Stop this service and set it to **Manual**. If there is no service named this, ignore this step.

## Start/Stop Jaspersoft ETL Services

The following are the instructions to start and/or stop Jaspersoft ETL services. These steps are not mandatory on a first-time installation because the services will be running by default.

### Start/Stop Jaspersoft ETL Admin Console

Command to stop the service:

```
$ cd C:\Jaspersoft\6.0.1\jac  
$ stop_tac.bat
```

Command to start the service:

```
$ cd C:\Jaspersoft\6.0.1\jac  
$ start_tac.bat
```

### Start/Stop Jaspersoft ETL Command Line

Command to stop the service:

```
$ cd C:\Jaspersoft\6.0.1\cmdline  
$ stop_cmdline.bat
```

Command to start the service:

```
$ cd C:\Jaspersoft\6.0.1\cmdline  
$ start_cmdline.bat
```

## Start/Stop Jaspersoft ETL Job Server

Command to stop the service:

```
$ cd C:\Jaspersoft\6.0.1\jobserver  
$ stop_jobserver.bat
```

Command to start the service:

```
$$ cd C:\Jaspersoft\6.0.1\jobserver  
$ start_jobserver.bat
```

## Configure the Admin Console

These steps are used one time only. They should be completed during the server installation.

1. Navigate to `http://[host name]:8080/org.jaspersoft.administrator` and enter the default username and password (admin). For the username, use `admin@yourdomain.com` or replace it with an email group if the user needs email notifications on ETL job failure (example: `email_group@yourdomain.com`).
2. Navigate to **User Settings** on the left menu and update the username (if needed) and library information.



**Data**

Login:

First name:

Last name:

Password: 

change password

Svn login:

Svn password:

Type: 

Data Integration

Role: 

Administrator/Viewer/

Active: ☒

**Connections stats**

**To the Administration Center**

First:

Last:

Number:

**To the Studio**

First:

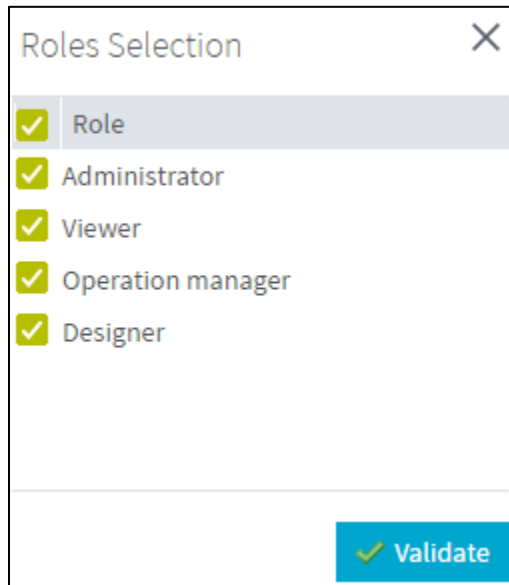
Last:

Number:

Save

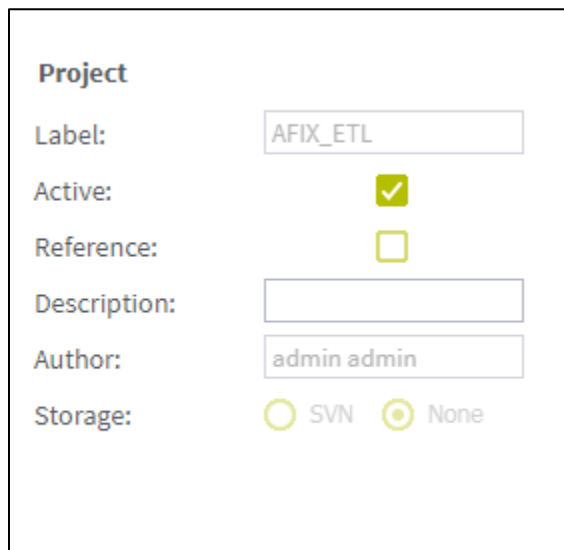
Cancel

3. Click on **Role** and select all of the roles.



A dialog box titled "Roles Selection" with a close button (X) in the top right corner. It contains a list of roles, each with a checked checkbox: Role, Administrator, Viewer, Operation manager, and Designer. At the bottom right, there is a blue button with a checkmark and the text "Validate".

4. Navigate to **Project settings** from the left menu and add a new project by clicking the **Add** button.
5. Name the project as **AFIX\_ETL**, select the **Active** option, enter **AFIX\_ETL** as the description and **admin admin** as the Author, select **None** as the storage, and save it.



A form titled "Project" with the following fields and options:

- Label:** Text input field containing "AFIX\_ETL".
- Active:** Radio button with a checkmark.
- Reference:** Radio button.
- Description:** Text input field.
- Author:** Text input field containing "admin admin".
- Storage:** Radio button group with "SVN" and "None" options. "None" is selected.

6. Navigate to **Project authorization** from the left menu. Click on each of the newly created projects and assign read/write permissions to the user.

User Authorizations for the Project: AFIX_ETL									
Authorizations by Project					Authorizations by User				
Project					User Authorizations for the Project: AFIX_ETL				
Project ...	Label				Type	Login	Last name	First na...	Active
AFIX_ETL		1	1			admin@stchome.com	admin	admin	✓
									Right

7. Create the following directories and files in the server:

```
C:\Jaspersoft\6.0.1\deploy
C:\Jaspersoft\6.0.1\deploy\generatedJobs
C:\Jaspersoft\6.0.1\deploy\executionLogs
C:\Jaspersoft\6.0.1\cmdline\exports
C:\Jaspersoft\6.0.1\Audit
C:\Jaspersoft\6.0.1\Audit\reports
C:\Jaspersoft\6.0.1\joblogs
C:\Jaspersoft\6.0.1\joblogs\log.txt
```

8. In Primary Command Line configuration, set the path for the Job generation folder to C:/Jaspersoft/6.0.1/cmdline/exports

CommandLine/primary (5 Parameters)		✓
Host:	localhost	✓
Port:	8002	✓
Job generation folder:	C:/Jaspersoft/6.0.1/cmdline/exports/	✓ Validity of path cannot be checked
User component path:		✓ Validity of path cannot be checked
Version	6.0.1.20150908_1633	✓

9. In Job Conductor configuration, set the path for the Generated jobs folder to c:/Jaspersoft/6.0.1/deploy/generatedJobs and the path to the Tasks logs folder to c:/Jaspersoft/6.0.1/deploy/executionLogs

Job Conductor (7 Parameters)		✓
Generated jobs folder:	c:/Jaspersoft/6.0.1/deploy/generatedjobs	✓
Tasks logs folder:	c:/Jaspersoft/6.0.1/deploy/executionLogs	✓
Number of executions log:	1000	✓
Maximum age of log file(d):	0	✓
Maximum number of generated jobs:	3	✓
Maximum age of generated job(d):	0	✓

10. In Logging configuration, set the Technical log file path to `c:/Jaspersoft/6.0.1/joblogs/log`



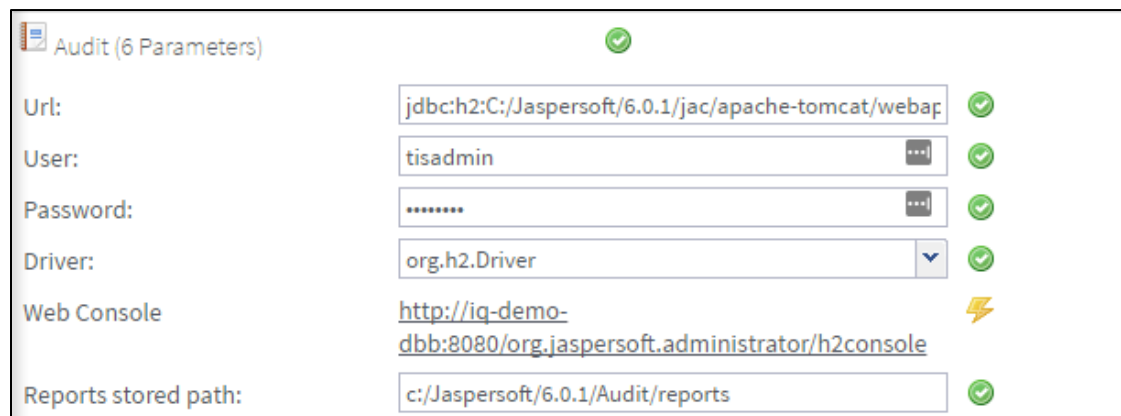
Logging (4 Parameters / 1 errors)

Technical log file path:  ✓

Technical log threshold:  ✓

Business log file path:  ✓

11. In Audit configuration, set the Reports stored path to `c:/Jaspersoft/6.0.1/Audit/reports`



Audit (6 Parameters) ✓

Url:  ✓

User:  ✓


Password:  ✓

Driver:  ✓

Web Console: <http://iq-demo-dbb:8080/org.jaspersoft.administrator/h2console> ⚡

Reports stored path:  ✓

12. Navigate to **Servers** page from the menu and create a new execution server with the following settings:
- Label: Name of the job server
  - Host: ETL Server IP (it usually ends with *dbb*)
  - Command port: 8000
  - File transfer port: 8001
  - Monitoring port: 8888
  - Active: Select this option (enable)
  - Username: the admin username for the ETL
  - Password: the password for the admin ETL user

Execution server	
Label:	qa0-etl
Description:	
Host:	10.0.5.137
Time zone:	<input type="text"/> 
Command port:	8000
File transfer port:	8001
Monitoring port:	8888
Timeout on unknown state (s):	120
Username:	admin@stchome.com
Password:	*****
Use SSL:	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>
<input type="checkbox"/> Jaspersoft Runtime	

13. Log in via Remote Desktop to Windows Server using ETL server owner.
14. Copy the etl.zip file (from /DBB/ETL) to a location convenient for you on the ETL Jaspersoft server to unzip the file, such as a home directory.
15. Unzip the etl.zip file to the server in (C:\) directory (Windows), which creates a directory structure similar to this:
  - C:\etl
  - C:\etl\data
  - C:\etl\archive

## SMaRT AFIX Jaspersoft ETL Deployment - Windows

The following outlines how to import (migrate) Jaspersoft ETL for SMaRT AFIX.

## Pre-Migration Checklist

- Confirm that the Postgres database is installed and configured
- Retrieve the passwords for the SMaRT AFIX database (*afixdb*)
- Retrieve the Jaspersoft ETL admin username and password
- Confirm that port 8080 is open across all firewalls
- Confirm that all of the steps in the Admin Console configuration are completed on a first-time installation
- Copy these components from /DBB/ETL into your local directory:
  - API\_Vaildation\_Sequential\_Execution\_0.1
  - etl
  - etl\_201703
  - Forecaster\_Sequential\_Execution\_0.1
  - ODS\_Sequential\_Execution\_0.1
  - OLAP\_Sequential\_Execution\_0.1
  - AFIX\_Assessment\_Benchmark\_0.1
  - UserApi\_Sequential\_Execution\_0.1
- Place all of the API files in /etl/afix/api/
- The API\_EXTRACT\_Complete.tkn file should be placed along with the other API files so that it can help trigger ETL jobs.
- Identify whether the installation is an upgrade from prior versions or a fresh installation from scratch.

## New Installation Instructions (for the First Time Only)

If this is the first time you deploying Jaspersoft ETL, follow the steps below. Otherwise, see the [Upgrade Instructions](#).

The steps below only need to be performed once. They should be completed during the server installation.

### Configure the Admin Console

1. Navigate to `http://[host name]:8080/org.jaspersoft.administrator` and enter the default username and password (admin). For the username, use `admin@yourdomain.com` or replace it with an email group if the user needs email notifications on ETL job failure (example: `email_group@yourdomain.com`).
2. Navigate to **Project settings** from the left menu and add a new project by clicking the **Add** button.
3. Name the new project **AFIX\_ETL**. Select the **Active** option, enter **admin admin** as the Author, and select **NONE** as the Storage.

**Project**

Label:

Active: ☒

Reference: ☐




Description:

Author:


Storage: ☐ SVN ☒ None

4. Navigate to **Project authorization** from the left menu. Click on the newly created project and assign read/write permission to the user.

User Authorizations for the Project: **AFIX\_ETL**

Type	Login	Last name	First na...	Active	Right
	admin@stchome.com	admin	admin		

5. Navigate to **Servers** page from the menu and create a new execution server with the following settings:
- Label: AFIX\_jobServer
  - Host: ETL Server IP (it usually ends with *dbb*)
  - Command port: 8000
  - File transfer port: 8001
  - Monitoring port: 8888
  - Active: Select this option (enable)
  - Username: the admin username for the ETL
  - Password: the password for the admin ETL user

Execution server	
Label:	<input type="text" value="qa0-etl"/>
Description:	<input type="text"/>
Host:	<input type="text" value="10.0.5.137"/>
Time zone:	<input type="text"/> 
Command port:	<input type="text" value="8000"/>
File transfer port:	<input type="text" value="8001"/>
Monitoring port:	<input type="text" value="8888"/>
Timeout on unknown state (s):	<input type="text" value="120"/>
Username:	<input type="text" value="admin@stchome.com"/>
Password:	<input type="password" value="....."/>
Use SSL:	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>
<input type="checkbox"/> Jaspersoft Runtime	

6. Log in via SSH to the Unix server using the ETL server owner.
7. Copy the `etl.zip` file (from `/DBB/ETL`) to a location convenient for you on the ETL Jaspersoft server to unzip the file, such as a home directory.
8. Unzip the `etl.zip` file to the server in the root directory (Unix), which creates a directory structure similar to this:
  - `c:\etl\afix`
  - `c:\etl\afix\api`
  - `c:\etl\afix\archive`
  - `c:\etl\afix\bulkload`
  - `c:\etl\afix\dataout`
  - `c:\etl\afix\input`
  - `c:\etl\afix\rejects`
  - `c:\etl\afix\tmp`
  - `c:\etl\afix\validation`



## Deploy the ETL Components

1. If a previous ETL Projects already exists, perform a backup of it.
2. Copy the following files from the installation files to a convenient location to deploy:
  - UserApi\_Sequential\_Execution.zip
  - API\_Validation\_Sequential\_Execution.zip
  - ODS\_Sequential\_Execution.zip
  - Forecaster\_Sequential\_Execution\_0.1.zip
  - OLAP\_Sequential\_Execution.zip
  - AFIX\_Assesment\_Benchmark.zip
3. Navigate to the Job Conductor page.
4. Select **Add > Normal Task** and add the following: Label = User API Execution; Description = User API Execution.
5. Click **Import Generated Jobs** and select the UserApi\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
6. Click **Save**.
7. Navigate to the task **AFIX IWeb API Validation**.
8. Select **Add > Normal Task** and add the following: Label = AFIX IWEB API Validation; Description = AFIX IWEB API Validation.
9. Click **Import Generated Jobs** and select the API\_Validation\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
10. Click **Save**.
11. Select **Add > Normal Task** and add the following: Label = AFIX Stage 2 ODS Load; Description = AFIX Stage 2 ODS Load.
12. Click **Import Generated Jobs** and select the ODS\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
13. Click **Save**.
14. Select **Add > Normal Task** and add the following: Label = AFIX Forecast Execution; Description = AFIX Forecast Execution.

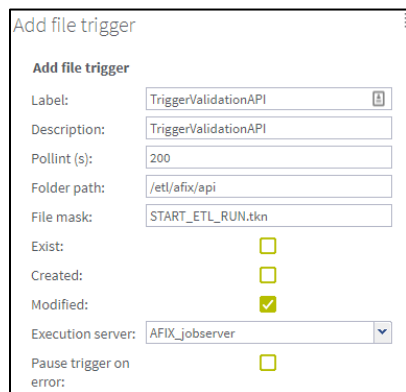
15. Click **Import Generated Jobs** and select the `Forecaster_Sequential_Execution.zip` file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
16. Click **Save**.
17. Select **Add > Normal Task** and add the following: Label = AFIX OLAP Execution; Description = AFIX OLAP Execution.
18. Click **Import Generated Jobs** and select the `OLAP_Sequential_Execution.zip` file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
19. Click **Save**.
20. Select **Add > Normal Task** and add the following: Label = AFIX Assessment Benchmark; Description = AFIX Assessment Benchmark.
21. Click **Import Generated Jobs** and select the `AFIX_Assessment_Benchmark.zip` file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
22. Click **Save**.
23. For each job created above, update the following Contexts within the Context tab located at the bottom of the page. Select custom values as needed. If the client is configured to receive email notifications about failures/successes, then Email\_active should be True; otherwise it should be false. For Email\_Active=True, all of the parameters in the Email section should be keyed in with proper values.
  - Email\_To
  - Email\_SMTP\_Host
  - Email\_SMTP\_Port
  - AFIX\_Email\_Notification
  - Email\_Active
  - Email\_UserName
  - Email\_Password
  - Web service related parameters (Forecaster):
    - SOAP\_ACTION
    - ENDPOINT
  - Database-related parameters:
    - AFIX\_DB - Login, Password, Port, Database, and Server

- Source\_DB\_Context - Login, Password, Port, Database, and Server
- RDS-related parameters for ODS\_sequential\_job
  - Psql\_Path - Path of the psql (by default, it is /usr/pgsql-9.4/bin)
  - Rds\_Postgres - A boolean parameter; set it to True if the database is RDS
  - Windows\_Execution\_Environment - A boolean parameter; set it to False; the ID of the ETL execution environment is UNIX.

24. Save when finished.

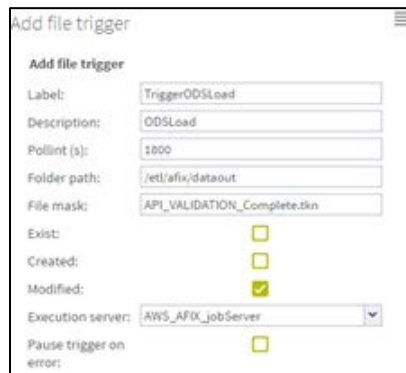
25. Initial load instructions:

- Run the **AssessmentBenchmark** task
- Go to the task **IWeb API Validation** and add a file trigger with the following values: Label = TriggerValidationAPI, Folder Path = /etl/afix/api, File Mask = START\_ETL\_RUN.tkn , Pollint(s) = 200



The screenshot shows the 'Add file trigger' dialog box. The fields are filled as follows: Label: TriggerValidationAPI, Description: TriggerValidationAPI, Pollint (s): 200, Folder path: /etl/afix/api, File mask: START\_ETL\_RUN.tkn. The 'Exist:', 'Created:', and 'Pause trigger on error:' checkboxes are unchecked. The 'Modified:' checkbox is checked. The 'Execution server:' dropdown is set to 'AFIX\_jobserver'.

- Go to the task **AFIX Stage 2 ODS Load** and add a file trigger with these values: Label = TriggerODSLoad, Folder Path = /etl/afix/dataout, File Mask = API\_VALIDATION\_Complete.tkn, Pollint(s) = 200



The screenshot shows the 'Add file trigger' dialog box. The fields are filled as follows: Label: TriggerODSLoad, Description: ODSLoad, Pollint (s): 200, Folder path: /etl/afix/dataout, File mask: API\_VALIDATION\_Complete.tkn. The 'Exist:', 'Created:', and 'Pause trigger on error:' checkboxes are unchecked. The 'Modified:' checkbox is checked. The 'Execution server:' dropdown is set to 'AWS\_AFIX\_jobServer'.

- Go to the task **AFIX Forecast Execution** and add a file trigger with the following values: Label = TriggerForecast, Folder Path = /etl/afix/dataout, File Mask = API\_LOADS\_TO\_ODS\_Complete.tkn, Pollint(s) = 200. Add the JVM parameters -Xms1024M and -Xmx15690M

The screenshot shows the 'Add file trigger' dialog box for the 'AFIX Forecast Execution' task. The fields are filled as follows: Label: TriggerForecast, Description: (empty), Pollint (s): 1200, Folder path: /etl/afix/dataout, File mask: API\_LOADS\_TO\_ODS\_Complete.tkn. The 'Exist:', 'Created:', and 'Pause trigger on error:' checkboxes are unchecked. The 'Modified:' checkbox is checked. The 'Execution server' dropdown is set to 'AWS\_AFIX\_jobServer'.

- Go to the task **AFIX OLAP Execution** and add a file trigger with the following values: Label = TriggerOLAP, Folder Path = /etl/afix/dataout, File Mask = Forecast\_Loads\_Complete.tkn, Pollint(s) = 200. Add the JVM parameters -Xms1024M and Xmx15690M

The screenshot shows the 'Add file trigger' dialog box for the 'AFIX OLAP Execution' task. The fields are filled as follows: Label: TriggerOLAP, Description: TriggerOLAP, Pollint (s): 1800, Folder path: /etl/afix/dataout, File mask: Forecast\_Loads\_Complete.tkn. The 'Exist:', 'Created:', and 'Pause trigger on error:' checkboxes are unchecked. The 'Modified:' checkbox is checked. The 'Execution server' dropdown is set to 'AWS\_AFIX\_jobServer'.

- Go to the task **UserApi Sequential Execution** and add a file trigger with the following values: Label = TriggeruserAPI, Folder Path = /etl/afix/dataout, File Mask = OLAP Complete.tkn, Pollint(s) = 200. After that, run the task **UserApi Sequential Execution**.

**Add file trigger**

Label: TriggerUserLoad

Description: TriggerUserLoad

Pollint (s): 400

Folder path: /etl/afix/dataout

File mask: OLAP\_Complete.tkn

Exist: ☐

Created: ☐

Modified: ☒

Execution server: AFIX\_jobserver

Pause trigger on error: ☐

26. Once the initial loads have completed, the ODS and OLAP tables are populated. Now the daily sequence can be scheduled. Go to the AFIX IWeb API Execution task and add the Cron trigger *Trigger\_IWeb\_API*. Enter the following values and save:

- Timezone Strategy: TAC Time
- Minutes: 0
- Hours: 0
- Days of Month: Leave blank
- Months: 1,2,3,4,5,6,7,8,9,10,11,12
- Days of the Week: 1,2,3,4,5,6,7
- Years: leave blank

**Add Cron trigger**

Label: TriggerWEBAPI

Description:

Time zone strategy: TAC time

[Open UI configurator](#) [Open Cron Help](#)

Minutes \*: 0

Hours \*: 0

Days of month \*\*:

Months \*: 1,2,3,4,5,6,7,8,9,10,11,12

Days of week \*\*: 1,2,3,4,5,6,7

Years:

Pause trigger on error: ☐

27. Turn on the notify/email feature. **Important Note:** SMTP needs to be configured beforehand.

- Select **Notifications** from the left menu
- Click **Add**
- Select the **Tasks** category

- Select **On task failed**
- Select **Enabled**
- Select **Recipients** to specify the user's email. It is better to create an email group as a recipient so that notifications are sent to multiple people
- Select **AFIX ETL Workflow**

If the upgrade needs to be aborted for any reason, import the previously created backup. Alternatively, redeploy the previous version of the content.

## Upgrade Instructions

If this is not the first time you are deploying Jaspersoft ETL (i.e., it was deployed earlier), follow the steps below. Otherwise, see the [New Installation Instructions](#).

The steps below only need to be performed once. They should be completed during the server installation.

### Configure the Admin Console

1. Navigate to `http://[host name]:8080/org.jaspersoft.administrator` and enter the default username and password (admin). For the username, use `admin@yourdomain.com` or replace it with an email group if the user needs email notifications on ETL job failure (example: `email_group@yourdomain.com`).
2. Log in via SSH to the Unix server using the ETL server owner.
3. Copy the `etl.zip` file (located at `/DBB/ETL`) to the Jaspersoft ETL server. Use a location convenient for you to unzip the file, such as a home directory.
4. Unzip the `etl.zip` file to the server in the Unix root directory (Unix), which adds the following files that were created as part of this release:
  - `c:\etl\afix`
  - `c:\etl\afix\api`
  - `c:\etl\afix\archive`
  - `c:\etl\afix\bulkload`
  - `c:\etl\afix\dataout`
  - `c:\etl\afix\input`
  - `c:\etl\afix\rejects`
  - `c:\etl\afix\tmp`
  - `c:\etl\afix\validation`

## Deploy the ETL Components

1. If a previous ETL Projects already exists, perform a backup of it.
2. Copy the following files from the installation files to a convenient location to deploy:
  - API\_Validation\_Sequential\_Execution.zip
  - ODS\_Sequential\_Execution.zip
  - Forecaster\_Sequential\_Execution\_0.1.zip
  - OLAP\_Sequential\_Execution.zip
  - AFIX\_Assesment\_Benchmark.zip
  - UserApi\_Sequential\_Execution\_0.1
3. Navigate to the Job Conductor page.
4. Navigate to the task **AFIX Assessment Benchmark**.
5. Click **Import Generated Jobs** and select the AFIX\_Assessment\_Benchmark.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
6. Click **Save**.
7. Navigate to the task **AFIX IWeb API Validation**.
8. Click **Import Generated Jobs** and select the UserApi\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
9. Click **Save**.
10. Navigate to the task **AFIX IWeb API Validation**.
11. Click **Import Generated Jobs** and select the API\_Validation\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
12. Click **Save**.
13. Navigate to the task **AFIX Stage 2 ODS Load**.
14. Click **Import Generated Jobs** and select the ODS\_Sequential\_Execution.zip file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
15. Click **Save**.

16. Navigate to the task **AFIX Forecast Execution**.
17. Click **Import Generated Jobs** and select the `Forecaster_Sequential_Execution.zip` file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
18. Click **Save**.
19. Navigate to the task **AFIX OLAP Execution**.
20. Click **Import Generated Jobs** and select the `OLAP_Sequential_Execution.zip` file downloaded as part of the prerequisites. Add the following: Execution server = AFIX\_JobServer; On Unavailable JobServer = Recover Task.
21. Click **Save**.
22. For each job created above, update the following Contexts within the Context tab located at the bottom of the page. Select custom values as needed. If the client is configured to receive email notifications about failures/successes, then Email\_active should be True; otherwise it should be false. For Email\_Active=True, all of the parameters in the Email section should be keyed in with proper values.
  - Email\_To
  - Email\_SMTP\_Host
  - Email\_SMTP\_Port
  - AFIX\_Email\_Notification
  - Email\_Active
  - Email\_UserName
  - Email\_Password
  - Custom Date: Set to the current date +1. For example, if the current date is 2017-03-06, the context value should be set to 2017-03-07.
  - RDS-related parameters for ODS\_sequential\_job
    - Psql\_Path - Path of the psql (by default, it is `/usr/pgsql-9.4/bin`)
    - Rds\_Postgres - A boolean parameter; set it to True if the database is RDS
    - Windows\_Execution\_Environment - A boolean parameter; set it to False; the ID of the ETL execution environment is UNIX.
23. Save when finished.
24. Initial load instructions: Go to the task AFIX IWeb API Execution. Run the task and wait to see if the job executes without any issues. Once it has made progress, make sure each of these tasks is triggered and completes:



- IWeb API Validation
- State 2 ODS Load
- Forecast Execution
- OLAP Execution

25. Once the initial loads have completed, the ODS and OLAP tables are populated. Now the daily sequence can be scheduled. Resume the CRON trigger *Trigger\_IWeb\_API*. Go to the task *OLAP\_Sequential\_Execution* and change the context parameter *custom date* to the original value in *OLAP\_Sequential\_Execution* and save.

If the upgrade needs to be aborted for any reason, import the previously created backup. Alternatively, redeploy the previous version of the content.

## JasperReports Server Installation - Windows

The following instructions explain how to install the JasperReports Server on Windows.

### Prerequisite

Download all of the JasperReports Server contents from the distribution site. The JRS folder contains the following files:

- applicationContext-externalAuth-oAuth
- applicationContext-security
- applicationContext-security-web
- InstallCert\$SavingTrustManager.class
- InstallCert.class
- jasperreports-server-6.2.1-windows-64bit-installer.exe
- jasperserver.license
- LatoFont
- stc-jaspersoft-oauth-0.0.1-SNAPSHOT

### Installation Steps

1. Download the JasperReports Server for Windows and the license file from the release distribution:

```
Server Components\JRS\jasperreports-server-6.2.1-windows-64bit-
```

```
installer.exe  
Server Components\JRS\jasperserver.license
```

2. Run the JasperReports Server Installer by right-clicking on the file and selecting **Run as administrator**:

```
jasperreports-server-6.2.1-windows-64bit-installer.exe
```

3. Follow the prompts to accept the license agreement.
4. Select the **Install All Components and Samples** option.
5. Follow the prompts to specify the installation folder. Specify the following directory:

```
C:\Jaspersoft\jasperreports-server-6.2
```

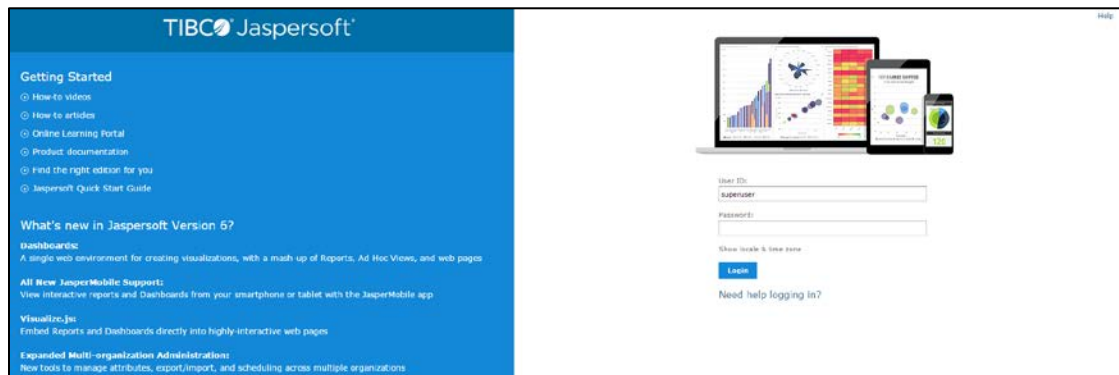
6. On completion of the installation, start the JasperReports server by selecting the following:

```
Launch JasperReports Server Now (for bundled Tomcat and PostgreSQL only)  
If you're installing on Linux, don't close the terminal window running  
the start script.
```

7. Validate the installation by logging in to the JasperReports Server console. Use your browser to access the server. Replace <hostname> below with the name or IP address of the server:

```
http://<hostname>:8080/jasperserver-pro
```

8. Log in with the user ID of *superuser* and the default password of *superuser*.



## Update the License File

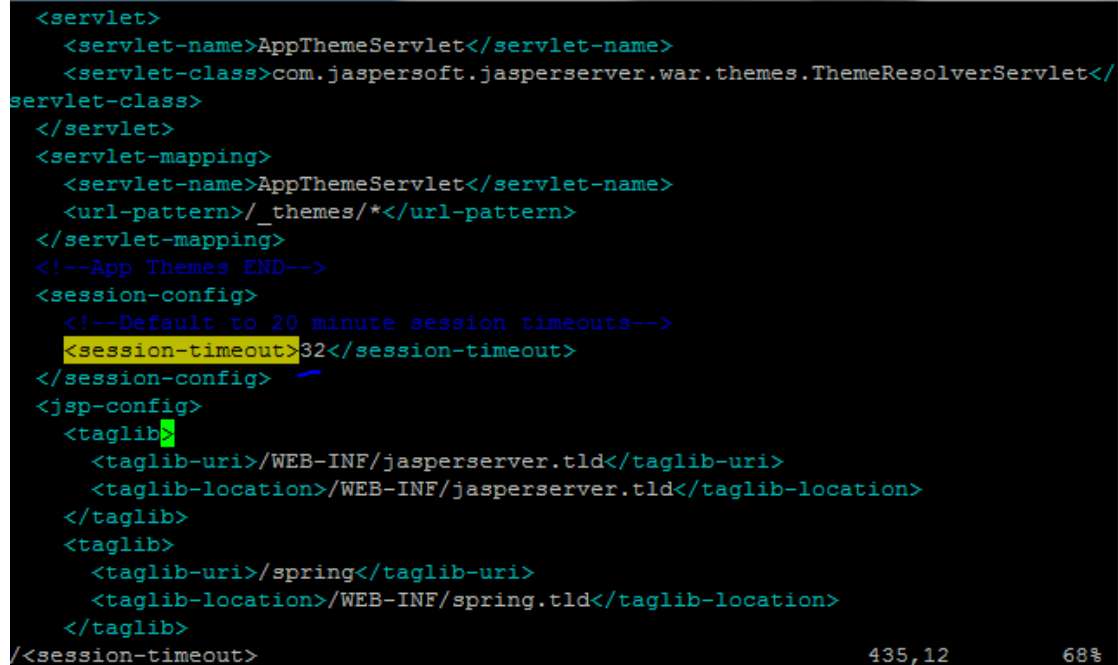
Follow these steps to update the license file for the JasperReports server:

1. Copy the license file (`jasperserver.license`) from the distribution site and move it to your home directory/desktop.
2. Replace the license file in the JasperReports installation directory (`C:\Jaspersoft\jasperreports-server-6.2\`) with the license file from the above step, overwriting the existing `jasperserver.license` file.
3. Restart the JasperReports server (see [Start/Stop the JasperReports Server](#) below).

## Increase the JasperReports Session Timeout Period

By default, the JasperReports timeout period is set to 20 minutes. However, the timeout period should be reset to 32 minutes in order to match with Keycloak.

1. Open `web.xml` from the path `C:\Jaspersoft\jasperreports-server-6.2\apache-tomcat\webapps\jasperserver-pro\WEB-INF\web.xml`.
2. Search for the property `<session-timeout>` under `<session-config>` and update the value to **32**. After this, the property and value should be similar to the image below:

A screenshot of a code editor showing the contents of a web.xml file. The file is dark-themed. The XML structure includes <servlet>, <servlet-mapping>, <!--App Themes END-->, <session-config>, <jsp-config>, and <taglib> sections. Within the <session-config> section, the <session-timeout> element is highlighted in yellow, and its value '32' is also highlighted. The status bar at the bottom right shows '435,12' and '68%'.

```
<servlet>
  <servlet-name>AppThemeServlet</servlet-name>
  <servlet-class>com.jaspersoft.jasperserver.war.themes.ThemeResolverServlet</servlet-class>
</servlet>
<servlet-mapping>
  <servlet-name>AppThemeServlet</servlet-name>
  <url-pattern>/_themes/*</url-pattern>
</servlet-mapping>
<!--App Themes END-->
<session-config>
  <!--Default to 20 minute session timeouts-->
  <session-timeout>32</session-timeout>
</session-config>
<jsp-config>
  <taglib>
    <taglib-uri>/WEB-INF/jasperserver.tld</taglib-uri>
    <taglib-location>/WEB-INF/jasperserver.tld</taglib-location>
  </taglib>
  <taglib>
    <taglib-uri>/spring</taglib-uri>
    <taglib-location>/WEB-INF/spring.tld</taglib-location>
  </taglib>
</jsp-config>
</session-timeout>
```

3. Restart the JasperReports server (see [Start/Stop the JasperReports Server](#) below).

## Start/Stop the JasperReports Server

To start or stop the JasperReports server, click the Start button, go to **All Programs > JasperReports Server > Start or Stop Services**, and then select either **Start Service** or **Stop Service**.

## JasperReports Configuration with Keycloak

A few configuration changes need to be made in order for JasperReports to be used with Keycloak.

### Prerequisite

Keycloak must be installed and set up, if the SSO-enabled version of IWeb and VOMS is being used.

### JasperReports Server Modifications

1. Edit the following values in the applicationContext-externalAuth-oAuth.xml file:

Key	XML Tag Name(s) to Update	Value
[KEYCLOAK_URL]	<authorization_location> <token_location> <userdetails_location> <logoutUrl>	URL of the Keycloak server. Example: <code>https://sso-dev.stchome.com/</code>
[KEYCLOAK_REALM]	<authorization_location> <token_location> <userdetails_location> <logoutUrl>	Keycloak realm that the client belongs to. This value needs to be changed, along with <keycloak_URL>. In this example, the realm name is <i>Dev-Integration</i> : <code>https://sso-dev.stchome.com/auth/realms/Dev-Integration</code>
[JASPERSERVER_URL]	<property name="redirecturl"> <property name="logoutUrl">	URL of the Jasper server. Example: <code>http://&lt;server_name&gt;:8080/jasperserver-pro/oauth</code>
[CLIENT_ID]	<property name="client_id">	Client ID as set on Keycloak. Example: <property name="client_id"> <value>jasper-aws-dev</value>
[CLIENT_SECRET]	<property name="clientsecret"	Credentials secret key generated by Keycloak.

Key	XML Tag Name(s) to Update	Value
	<pre>"&gt; &lt;property name="userdetails _secret"&gt;</pre>	
State_ID	<pre>&lt;property name="state"&gt;</pre>	<p>This is the global setting used to populate the STATE_ID attribute in Jaspersoft. Example:</p> <pre>&lt;bean id="oAuthUserDetailsService" class="com.jaspersoft.jasperserver.ps.OAuth.OAuthUserDetailsServiceImpl"&gt; &lt;property name="state"&gt; &lt;value&gt;WA&lt;/value&gt; &lt;/property&gt; &lt;/bean&gt;</pre>
Jaspersoft Roles	<pre>&lt;bean id="mtExternalUser SetupProcessor" class="com.jaspers oft.jasperserver.mu ltipleTenancy.securi ty.externalAuth.pro cessors.MTExternal UserSetupProcessor" parent="abstractEx ternalProcessor"&gt; &lt;property name="organizationRoleMap"&gt; &lt;map&gt; &lt;!-- Example of mapping customer roles to JRS roles -- &gt; &lt;entry&gt; &lt;key&gt; &lt;value&gt;ROLE_ADM IN_EXTERNAL_ORG ANIZATION&lt;/value&gt; &gt; &lt;/key&gt; &lt;value&gt;ROLE_ADM INISTRATOR&lt;/valu e&gt; &lt;/entry&gt; &lt;/map&gt;</pre>	<p>All the Jaspersoft Roles are configured inside this tag. If any new Jaspersoft Roles are needed, they must be configured here. In the &lt;entry&gt; tag, the key value should match with the client role defined at the Keycloak end.</p> <p>Currently, the following roles are configured:</p> <ol style="list-style-type: none"> <li>1. Administrator</li> <li>2. Superuser</li> <li>3. User Role</li> </ol>

2. Copy the applicationContext-externalAuth-oAuth.xml file (edited in Step 1) to <JASPERSERVER\_DIR>/apache-tomcat/webapps/jasperserver-pro/WEB-INF.

3. Copy stc-jaspersoft-oauth-1.0.0.jar (available in the JRS distribution folder) to <JASPERSERVER\_DIR>/apache-tomcat/webapps/jasperserver-pro/WEB-INF/lib.
4. Create and save a backup of the <JASPERSERVER\_DIR>/apache-tomcat/webapps/jasperserver-pro/WEB-INF/applicationContext-security.xml file.
5. In <JASPERSERVER\_DIR>/apache-tomcat/webapps/jasperserver-pro/WEB-INF/applicationContext-security.xml, replace the access value for the method `com.jaspersoft.jasperserver.api.metadata.user.service.ProfileAttributeService.putProfileAttribute` with **ROLE\_USER**.
6. Save a backup copy of the <JASPERSERVER\_DIR>/apache-tomcat/webapps/jasperserver-pro/WEB-INF/applicationContext-security-web.xml file again and replace the constructor-arg value for `org.springframework.security.web.authentication.LoginUrlAuthenticationEntryPoint` with **/oauth**.
7. Add the SSL certificate used by Keycloak to the Java installation that Jaspersoft is using. (By default, Java only knows about a small number of root certificates.) To do this, follow these steps:
  - a. Copy `InstallCert$SavingTrustManager.class` and `InstallCert.class` (both available in the STC Suite Distribution/Server Components/JRS directory) to the <JASPERSERVER\_DIR>/java/bin directory.
  - b. NOTE for sso-dev.stchome.com: This is only for Dev SSO SSL certificate installation. This URL changes based on your server hostname of the Keycloak/SSO server.
  - c. Go to the <JASPERSERVER\_DIR>/java/bin directory and execute these commands. The [sso\_link] differs based on the environment; an example might be something like sso-dev.stchome.com.

```
java -cp .\ InstallCert [sso_link]
keytool -exportcert -alias [sso_link]-1 -keystore jssecacerts -
storepass changeit -file [sso_link].cer
keytool -importcert -alias [sso_link] -keystore
../lib/security/cacerts -storepass changeit -file [sso_link].cer
```

8. Make database changes with the following commands. Jaspersoft stores all of its metadata in the Postgres database. All of the user-based profile attributes are stored in the *jiprofileattribute* table in Jaspersoft. By default, user attributes support a character size of 200. In Step E below, the data type size is changed from 200 to 1,000.
  - a. Navigate to the <Jasper Installation Directory>/postgres directory.
  - b. Run this command: `psql -U postgres -w` (the password is *postgres*).
  - c. Now you should see at the prompt: `postgres=#`

- d. Enter this command to connect to the Jasperserver database in Postgres: `\c jasperserver;` (the password is *postgres*).
  - e. Execute this SQL alter script: `ALTER TABLE jiprofileattribute ALTER COLUMN attrvalue TYPE character varying(100000);`
9. Restart the Jasper server and navigate to `JasperUrl/oauth` (see example). You should now be redirected to Keycloak to log in. Example:  
`http://52.10.228.158:8080/jasperserver-pro/oauth`

## Steps to Debug Issues Related to Keycloak/JasperReports Server Integration

If there are any issues with integrating Keycloak with Jasper, follow these suggestions below.

### Check the `applicationContext-externalAuth-oAuth.xml` File

Make sure that `applicationContext-externalAuth-oAuth.xml` is configured with the correct Keycloak and Jasper server parameters and with the correct `client_secret`.

### Keycloak Mappers

Make sure that the Jasper client has the below mappers mapped correctly in Keycloak, and check if the Org/fac List mapper contains the correct parameters. (Note that your API-KEY and API-URI will differ from the image below.)

Org/fac List

Protocol ?	openid-connect
ID	fce1efb4-6796-4106-824d-2549b87be6ab
Name ?	org/fac list
Consent Required ?	<input type="checkbox"/> OFF
Mapper Type ?	Org/fac list
Token Claim Name ?	org-fac
API-KEY ?	645645
API-URI ?	http://20.0.0.9:8080/web/api/v1/OrgFac/
Response format ?	application/json ▼

Name	Category	Type
org/fac list	Token mapper	Org/fac list
email	Token mapper	User Property
groups	Token mapper	Group Membership
username	Token mapper	User Property
realm roles	Token mapper	Realm Role List
roles	Token mapper	Client Role List
given name	Token mapper	User Property
family name	Token mapper	User Property
full name	Token mapper	User's full name

### Validate the IWeb Web Service

Make sure that the IWeb web service URL is accessible. The output of this should return the org/fac list. If there is an error, it needs to be fixed.



### Check the Whitelist Rules

If Jaspersoft is installed in an AWS environment, the outbound connection on port 8080 should be enabled for the IWeb server.

If Keycloak is installed in an AWS environment, the outbound connection on port 8080 should also be enabled for the IWeb server.

### Check the Firewall Rules

If there are any special firewall rules preventing the Jasper and/or Keycloak servers from accessing IWeb through port 8080, the need to be fixed so that the port is enabled.

## JasperReports Server Upgrade - Windows

These instructions are only required when deploying SMaRT AFIX for the first time or when upgrading from a version of SMaRT AFIX older than 1.17.4. If you have already deployed SMaRT AFIX 1.17.4, you should already have the web service plugin installed on your JasperReports server and can skip these instructions.

As a part of SMaRT AFIX 1.17.4, the new SMaRT AFIX Online Tool web service was introduced to help support the CDC's AFIX Online Tool application. In order to integrate this tool with SMaRT AFIX, a plugin must be added to the existing JasperReports server.



## Prerequisites

1. JasperReports server has been installed.
2. The web service plugin zip file has been downloaded to your application server (APP) and the contents extracted. The unzipped folder is referenced as \$WS\_DS from this point on.

```
\APP\JRS\webservicedes_v1.0_3.zip
```

3. Locate your JasperReports server web application folder, which is referred to as \$JRS\_HOME from this point on. It is recommended that you back up this folder before beginning the plugin installation.

```
C:\Jaspersoft\jasperreports-server-6.2\apache-tomcat\webapps\jasperserver-pro\
```

## Plugin Installation Steps

The installation should be performed as root user.

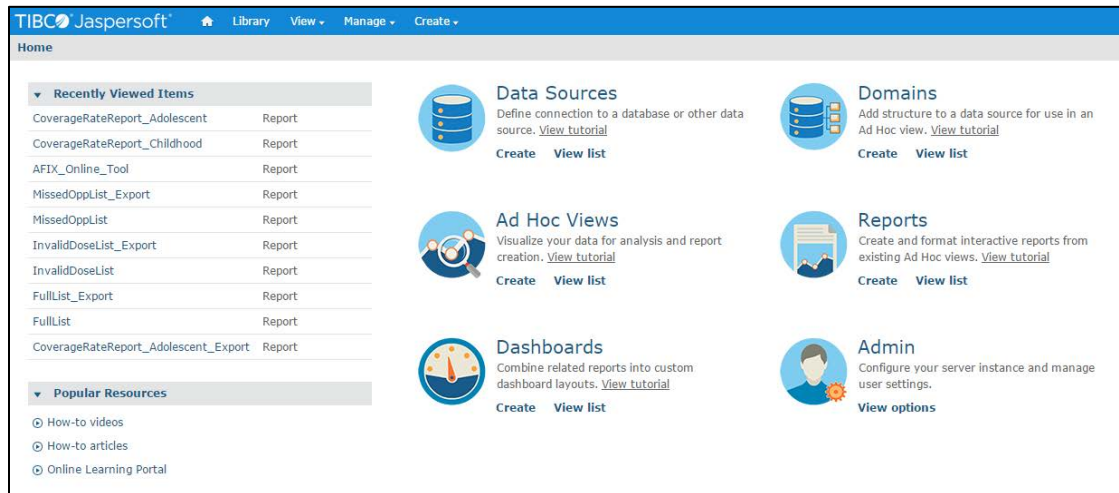
1. Stop your web server running JasperReports server.
2. Open the folder \$WS\_DS/JRS/WEB-INF/bundles and copy the contents to \$JRS\_HOME/WEB-INF/bundles/. Note that this should not overwrite any existing files.
3. Restart the JasperReports server.

## Validation Steps

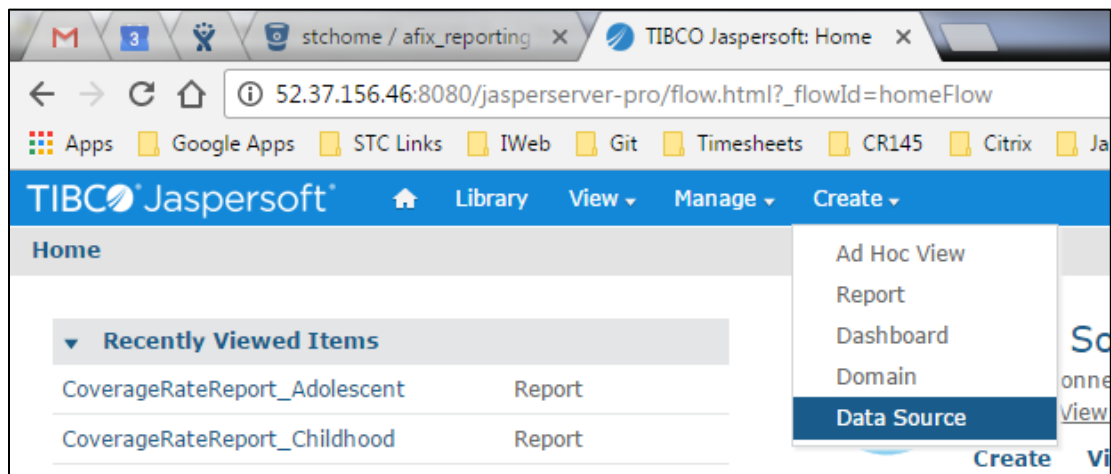
Follow these steps to confirm that the plugin has been successfully installed:

1. Navigate to your JasperReports server admin console.

2. Log in as an admin-level user.



3. Select **Create > Data Source** from the top menu.



4. Confirm that **Web Service Data Source** is listed in the Type drop-down list.

The screenshot shows the TIBCO JasperSoft web interface for creating a new data source. The page title is 'New Data Source'. The main heading is 'Set Data Source Type and Properties'. Below this, a instruction states: 'First, select the type of data source you wish to add, then enter the required property values.' The 'Type' dropdown menu is open, displaying a list of data source types. 'Web Service Data Source' is highlighted at the bottom of the list. Other visible options include AWS Data Source, Bean Data Source, Cassandra Data Source, Internal Diagnostic Data Source, JDBC Data Source, JNDI Data Source, MongoDB Data Source, MongoDB JDBC Data Source, Virtual Data Source, and Web Service Data Source. The 'Auth Ty' field is set to 'none'. The 'Language' field is set to 'json'. The 'Request Verb' field is set to 'post'. The 'Web Service URI' field contains the text 'superuser'. The 'Password' field is masked with dots. The 'Username' field is empty.

## SMaRT AFIX JasperReports Deployment - Windows

The following outlines how to import (migrate) Jaspersoft Reports for SMaRT AFIX.

### Pre-Migration Checklist

- Confirm that the Postgres database is installed and configured
- Retrieve the passwords for the SMaRT AFIX database (*afixdb*)
- Retrieve the Jaspersoft superuser username and password
- Confirm that the SMaRT AFIX Online Tool web service is installed

- Confirm that all necessary ports are open across all firewalls (the default port is 80)
- Confirm that the release distribution zip file for Jasper Reports is extracted from /APP/JRS/AFIX\_Reports-[version number].zip and copied to your local drive.
- **Important:** Be sure to update the JasperReports server by following the instructions in [SMaRT AFIX JasperReports Server Upgrade - Windows](#).

## Procedure Steps

Follow these steps to deploy Jaspersoft Reports.

### Export the Jaspersoft Repository for Backup

Export the repository by selecting **Manage > Server Settings > Export (Export Everything)** in Jaspersoft. Save the file as a backup.

The screenshot shows the TIBCO JasperSoft web interface. The top navigation bar includes 'Library', 'View', 'Manage', and 'Create'. The left sidebar shows 'Settings' with options like 'Log Settings', 'Log Collectors', 'Ad Hoc Settings', 'Ad Hoc Cache', 'OLAP Settings', 'AWS Settings', 'Server Attributes', 'Restore Defaults', 'Import', and 'Export' (which is selected). The main content area is titled 'Export' and contains the following sections:

- File Properties:** 'Export Data File Name (required):' with a text input field containing 'export.zip'.
- Export Options:** A checkbox labeled 'Export Everything' is checked.
- Roles and Users to Export:** Three radio buttons are present: 'Selected roles and users' (selected), 'Users with selected roles', and 'Roles with selected users'. Below these are two searchable lists:
  - Roles:** A list containing 'ROLE\_ADMINISTRATOR', 'ROLE\_ANONYMOUS', 'ROLE\_DEMO', 'ROLE\_PORTLET', 'ROLE\_SUPERMART\_MANAGER', 'ROLE\_SUPERUSER', and 'ROLE\_USER'. A 'Select All Roles' button is at the bottom.
  - Users:** A list containing '104user', '2centeruser', 'amy\_int', 'amy\_prov', 'amy\_rc', 'anarayan', and 'andadminqa0'. A 'Select All Users' button is at the bottom.
- Resources to Export:** Three checkboxes are checked: 'Data Sources', 'Domains', and 'Ad Hoc Views'.
- Assets to Export:** Three checkboxes are checked: 'Sub-organizations', 'Dependencies', and 'Permissions'.
- Events to Export:** Three checkboxes are unchecked: 'Access Events', 'Audit Events', and 'Monitoring Events'.

An 'Export' button is located at the bottom left of the main content area.

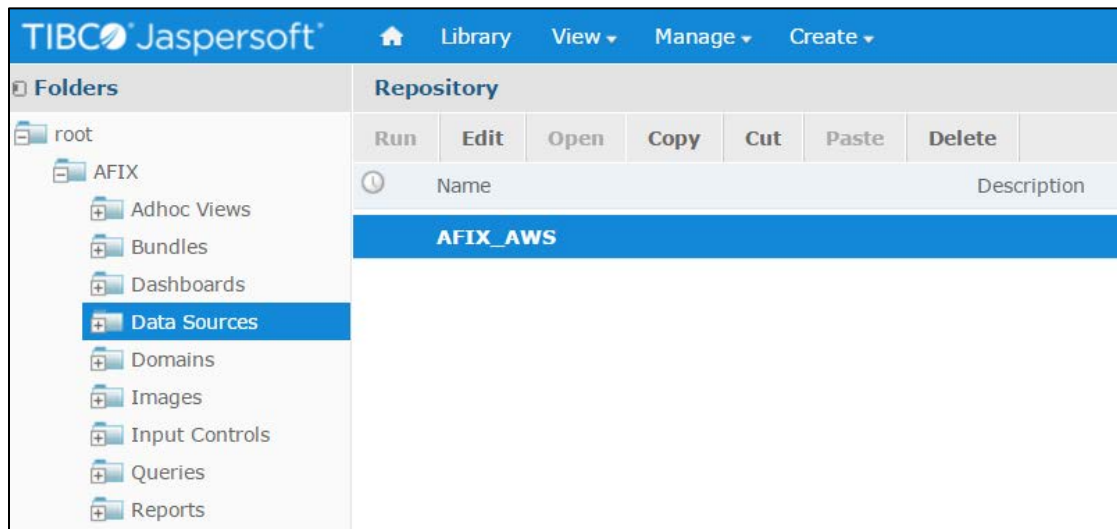
### Import the Content via the Portal

1. Log in to the Jaspersoft BI Portal as the administrator user.
2. Navigate to **Server Settings > Import**.

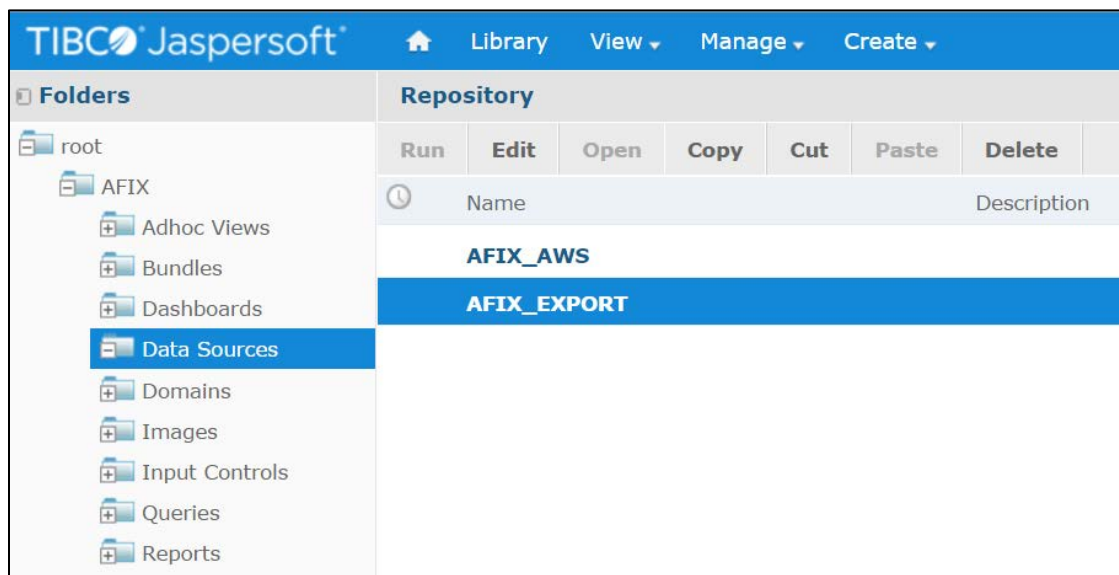
3. Import the AFIX\_Reports-[version number].zip file.
4. Update the data source with the database connection information.

### Import the Content via the Command Line

1. Confirm that JAVA\_HOME is set and your path includes jre\bin or jdk\bin.
2. Change to the buildomatic directory on the JasperReports server:  
C:\Jaspersoft\jasperreports-server-6.2.1\buildomatic
3. Execute the migrate command (adding in the correct version number):  
js-import.bat --input-zip "AFIX\_Reports-[version number].zip" --update --skip-user-update --include-access-events --include-audit-events --include-monitoring-events
4. Update the data source with the database connection information: From the left menu, go to **root > AFIX > Data Sources**. Select **AFIX\_AWS**, then click the Edit tab. Specify your database connection properties for Host, Port, and Password, then click **Save**.



5. Select **AFIX\_EXPORT**, then click the Edit tab. This is the web service data source linked to the SMaRT AFIX Online Tool web service.



6. Leave the defaults for Auth Type, Language, and Request Verb. Update the web service URI to point to your SMaRT AFIX Online Tool web service deployment. Note that even though the Password field is populated, no password is present or required; leave it as it is. Click **Save** when finished.

Edit Data Source: AFIX\_EXPORT

### Set Data Source Type and Properties

First, select the type of data source you wish to add, then enter the required property values.

Type:

Auth Type:

Language:

Request Verb:

Web Service URI:

Password:

Username:

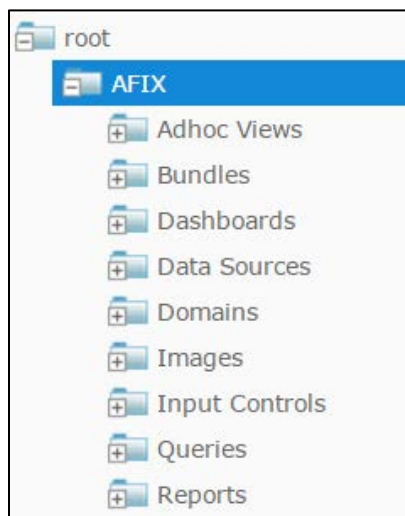
Save

Cancel

## Validate the New Content

The following steps perform a spot check on the newly created content to validate it and to check for any serious errors. It does not perform a full check of all possible issues and should be followed up with a functional validation of the content.

1. Log on to the Jaspersoft BI server as a user able to run a report. The user should be able to log in successfully and see the subfolders under `/root/AFIX` (select **View > Repositories**).



2. Validate that the user can execute and view a report as defined by their class or organization membership: Select the report from `AFIX/Reports/AFIX_Online_Tool`, select one report from any of the other sub-directories of `AFIX/Reports`, and confirm that both reports execute successfully.

### **Restore the Previous Content (if Necessary)**

If there are any uncorrectable issues and the release upgrade needs to be aborted, follow these steps to revert to the previous content:

1. Using the backup exported at the beginning of these steps, import using the steps above. Note that a re-import of the previous version of the content will also achieve the same back-out.
2. Perform the validation steps listed above.

## **Node.js Installation - Windows**

Follow these steps to install Node.js on Windows:

1. Go to <https://nodejs.org> and download the recommended version of Node.js.
2. Run the installer you downloaded.
3. Follow the prompts in the installer.
4. Restart your computer.
5. Open a command window and type: `npm install pm2 -g`
6. After the above, type: `npm i pm2-windows-service -g`



# SMaRT AFIX Application Installation Instructions - Windows

The following instructions explain how to install the application, the Oracle Instant Client, Visual Studio 2013 Community Edition, Windows SDK v8.1, and Redis; how to configure the application dashboard and quick links; specific configuration options, and information on standalone versus multiple application deployment.

If you are upgrading from a previously installed version of SMaRT AFIX, you can skip directly to the [Install the Deployment Package](#) section and continue from there.

## Prerequisites

The following should already be installed and configured:

- Windows Server 2012
- PostgreSQL server (DBB)
- Oracle server (COR)
- Node.js (APP)
- PM2 (APP)

## Installation and Deployment of SMaRT AFIX, iQ, and VOMS

If you are installing SMaRT AFIX alongside the iQ and/or VOMS applications, you only need to install the Oracle Instant Client, Visual Studio, Windows SDK, and Redis with the first application installation. Once these are installed, for subsequent applications that are running on the same server, you can skip down to the [Install the Deployment Package](#) section and continue from there instead.

## Install the Oracle Instant Client

1. Download Oracle Instant Client Basic and SDK for Windows. Extract Instant Client Basic somewhere on the disk (i.e., C:\oracle\instantclient\_12\_1), then extract Instant Client SDK into the same folder.
2. Add the path you extracted Oracle Instant Client into to the PATH environment variable. This can be accessed via the Advanced System Settings window.
3. Add the following system variables. (See <https://github.com/oracle/node-oracledb/blob/master/INSTALL.md#instwin> and <https://community.oracle.com/docs/DOC-931127> for more information.)
  - OCI\_LIB\_DIR to C:\oracle\instantclient\_12\_1\sdk\lib\msvc

- OCI\_INC\_DIR to C:\oracle\instantclient\_12\_1\sdk\include

## Install Visual Studio 2013 Community Edition

See <https://www.visualstudio.com/en-us/news/releasenotes/vs2013-community-vs> for download and installation instructions.

## Install Windows SDK v8.1

See <https://developer.microsoft.com/en-us/windows/downloads/windows-8-1-sdk> for download and installation instructions.

## Install Redis

Use this command:

```
msiexec /i Redis-x64-3.2.100.msi
```

See <https://github.com/MicrosoftArchive/redis> and <https://github.com/MicrosoftArchive/redis/releases/tag/win-3.2.100> for more information.

## Install the Deployment Package

Copy the provided zip/tar file to the target server. Extract the archive and change into the parent of the directory where it was extracted.

## Configure the Application Dashboard and Quick Links

If you are installing SMaRT AFIX alongside the iQ and/or VOMS applications, the steps below only need to be completed the first time an application is installed. This file should be saved for all subsequent installations.

1. Download the `apps.json` file from the release distribution application components shared folder.
2. Edit this file with a text editor and replace the placeholders `DASHBOARD_URL`, `IWEB_URL`, `AFIX_URL`, `PHC-HUB_URL`, `IQ_URL`, and `VOMS_URL` (if applicable for your installation) with their respective URLs.
3. Save this file and keep it handy as you will need to use it in the installation of iQ, VOMS, and the SSO dashboard.

An example of one such configuration object in the JSON file is shown below. In most cases, only the URL value needs to change:

```
{  
  "icon": "/static/public/img/STC - SmartAFIX.svg",  
  "id": "AFIX",  
}
```

```
"name": "SMaRT AFIX",
"url": "https://afix.stchome.com ",
"description": "Utilized to make AFIX assessments efficient, standardized and
meaningful.",
"hideIfUnavailable": true,
"accessRole": "Access_afix"
}
```

Copy this file to the following location:

```
<application_install_dir>/src/shared/helpers/appActions/
```

## Configure the Reverse Proxy

A reverse proxy is recommended to provide access to the various products. This is not explicitly required unless the products are running with the `ENABLE_SSL` option set to `true`. However, this will generally be the case when the products are being run in conjunction with IWeb on the same server. See the example Apache configurations at `package/docs/apache`.

## General Product Configuration Options

Once the package containing the products has been installed, there are some configuration options that can be set depending on the environment. The majority of these lie in `package/process.json`, which is simply a JSON configuration file for pm2. The options listed in bold below need to be changed to match your environment. Other options not in bold might not need to change, and in most cases can be the default setting. Some options in the `process.json` file are not listed at all below; those options should be left unchanged.

The options are as follows:

Option	Description
script	Location of the startup script application. The path to the script may need to be customized.
cwd	The path to the application. May need to be customized.
PRODUCT	The name of the product.
<b>HOST</b>	The host name for the product.
APIHOST	The host name of the product's respective API server (generally <i>localhost</i> ).
PORT	The port for the product.
APIPORT	The port for the product's API server.
NODE_ENV	This should always be <b>production</b> .
<b>SAML_ISSUER</b>	The SAML issuer (client) from Keycloak.
<b>SAML_ENTRY_POINT</b>	The SAML entry point from Keycloak.

Option	Description
<b>JASPER_SERVER</b>	The domain name of the JasperReports server.
REDIS_URL	The Redis URL used for storing client sessions.
<b>REVERSE_PROXY</b>	When configuring SMaRT AFIX with a reverse proxy, this should be set to <i>true</i> .
<b>ENABLE_SSL</b>	When set to <i>true</i> , this enables HTTPS support. If REVERSE_PROXY is set to <i>true</i> , this should be set to <i>false</i> even when the environment is configured for HTTPS.
<b>SECRET_SESSION</b>	The secret key for session storage. <b>IMPORTANT NOTE:</b> This value must be exactly the same for every application, in both the server and the API environment variables.

## SMaRT AFIX-Specific Configuration Options

The following options are specific to SMaRT AFIX configuration settings:

Option	Description
<b>VOMS_ORACLE_USER</b>	The username for IWeb's SIIS database. This is set to the default user for the SIIS, but may need to be updated depending on your configuration.
<b>VOMS_ORACLE_PASSWORD</b>	The password for IWeb's SIIS database. This is set to the default password for the SIIS, but may need to be updated depending on your configuration.
<b>VOMS_ORACLE_CONNECTION</b>	Connection information for IWeb's SIIS database. This needs to be updated to point to your IWeb's Oracle database instance.
<b>PG_USER</b>	The user account for the SMaRT AFIX PostgreSQL database.
<b>PG_PASSWORD</b>	The password for the associated PG_USER for the SMaRT AFIX PostgreSQL database.
<b>PG_HOST</b>	The hostname for the SMaRT AFIX PostgreSQL database.
<b>PG_PORT</b>	The port number for the SMaRT AFIX PostgreSQL database.
<b>AFIX_EXPORT_URI</b>	The URL for the SMaRT AFIX Online Tool web service. Only the hostname and possibly the port number for the URL need to be updated.
<b>AFIX_EXPORT_KEY</b>	The API Key for the SMaRT AFIX Online Tool web service. This should be left as the default.
<b>CDSI_FORECASTER_VERSION</b>	The current version of the CDSI Forecaster deployed. For the SMaRT AFIX 1.17.5.4 release, it should be set to <b>5.17.10</b> .
<b>API_URL_PREFIX</b>	This should be set to <b>/api</b>

## SMaRT AFIX for Independent States-Specific Options

These options are used for independent builds of SMaRT AFIX (i.e., not connected to IWeb) only and should be left unchanged for builds involving IWeb.

Option	Description
<b>API_URL_PREFIX</b>	This sets the API prefix for independent mappers.
<b>MANAGE_URL_PREFIX</b>	This sets the Manage Users page URL.
<b>IS_INDEPENDENT</b>	When this option is set to <i>true</i> , it enables independent build functions.
<b>MANAGE_USER_EMAIL</b>	This enables the password reset functionality for the Manage Users page.
<b>SERVICE_API</b>	This enables custom report template sharing for independent SMaRT AFIX. It should be set to <b>api/orgFacSearch</b> .

**NOTE:** Due to variations in the org-fac-micro-service between the different applications (SMaRT AFIX, VOMS, and iQ), it is recommended that you deploy the service that is bundled with SMaRT AFIX instead of the one bundled with other applications.

## Run the Application

Use pm2 to run the deployment package as shown below. In many cases, environment-specific configuration options must be set prior to running an application's package. See the configuration option sections above for more details.

```
pm2 start package-parent/process.json
```

## Start the Products upon Bootstrap

To have the products automatically start on every boot, do the following once it has been verified that they are running correctly:

```
npm install -g pm2-windows-service  
pm2-service-install [-n service-name]  
pm2 save
```

# Keycloak Configuration for SMaRT AFIX

This task is to be performed during SSO installation of the application. The table below lists each application and component, along with the JSON file name, client name, and URL placeholder name for each. Make sure to use the correct file and other information corresponding to the specific application/component installation.

Application Name	JSON File Name	Client Name	URL Placeholder Name
IWeb	iweb.json	iweb	IWEB-URL
PHC-Hub	phchub.json	phc-hub	PHC-HUB-URL
Jasper Report Server	jasper.json	jasper	JASPER-URL
iQ	interop.json	interop	INTEROP-URL
VOMS	voms.json	voms	VOMS-URL
Logviewer	interop-logviewer.json	interop-logviewer	LOGVIEWER-URL
Dashboard	dashboard.json	dashboard	DASHBOARD-URL

## Import the Client and Roles (First Time Only)

These steps explain how to import the client and configure the roles.

### Prerequisites

The location of the JSON file for the application being installed.

### Import Steps

1. Log in to Keycloak.
2. Select the desired realm for the application suite in the top left drop-down list.
3. Click **Import** on the left side menu.
4. Click the **Select File** button and browse to the SMaRT AFIX release /SSO/JSON directory.
5. Select the `afix.json` file and click **Open**.
6. **Important:** In the *If a resource exists* drop-down list, select **Skip**.
7. Select the `afix_Provider_Group.json` file and click **Open**.
8. **Important:** In the *If a resource exists* drop-down list, select **Skip**.

9. Select the `afix_ManageUsers_Role.json` file and click **Open**.
10. **Important:** In the *If a resource exists* drop-down list, select **Skip**.

## Configure the Client

1. On the left side menu, click **Clients**.
2. Locate the client named *afix* you just imported (see above) and click **Edit**.
3. On the Settings tab, enter the URL to the application everywhere there is a URL placeholder.
4. If the Client Protocol is SAML, expand the Fine Grain SAML Endpoint Configuration section at the bottom of the page and make sure the URL placeholders are replaced with the application URL.
5. Click the **Save** button at the bottom.
6. Click on the Mappers tab.
7. Locate the *user-type* mapper and click the **Edit** button.
8. In the API-URI box, replace the URL placeholder with the URL to your IWeb installation.
9. Verify the API-KEY is set to the API key of your IWeb instance.
10. Click the **Save** button at the bottom.

## Additional User Role for Independent States

The SMaRT AFIX build for independent states requires an additional realm role called *ManageUsers*. Follow these instructions to add it:

1. On the left side menu, click **Roles**.
2. On the Realm Roles tab, click the **Add Role** button on the right.
3. In the Role Name box, enter **ManageUsers**.
4. For Description, select to allow Access Manage Users Page.
5. Click the **Save** button at the bottom.
6. Confirm that *ManageUsers* now appears in the Roles drop-down list.

For independent states, a few management users must be configured in Keycloak. Once these users are set up, they can enable all other users on the Manage Users Page in SMaRT AFIX. The following steps can be performed only after the ETL jobs have completed and the users have been successfully migrated to Keycloak.

- KEYCLOAK

AFIX-IND

Configure

Realm Settings

Clients

Client Templates

Roles

Identity Providers

User Federation

Authentication

Manage

Groups

Users

Sessions

Users

Search...

Q

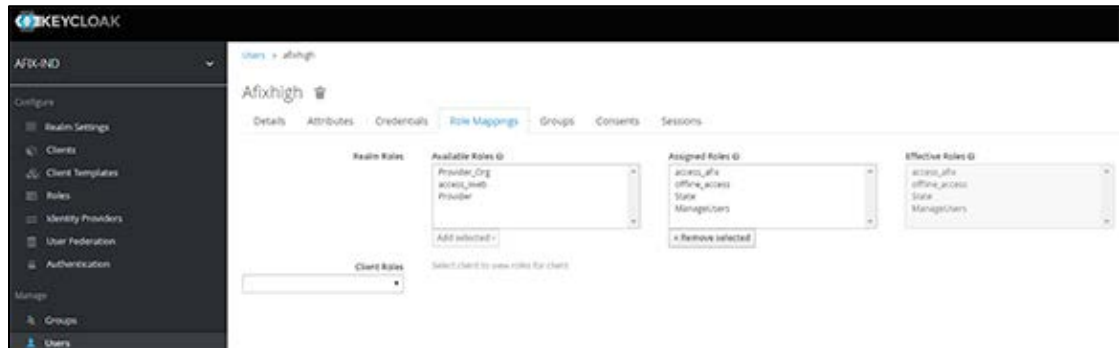
View all users

Please enter a search, or click on view all users

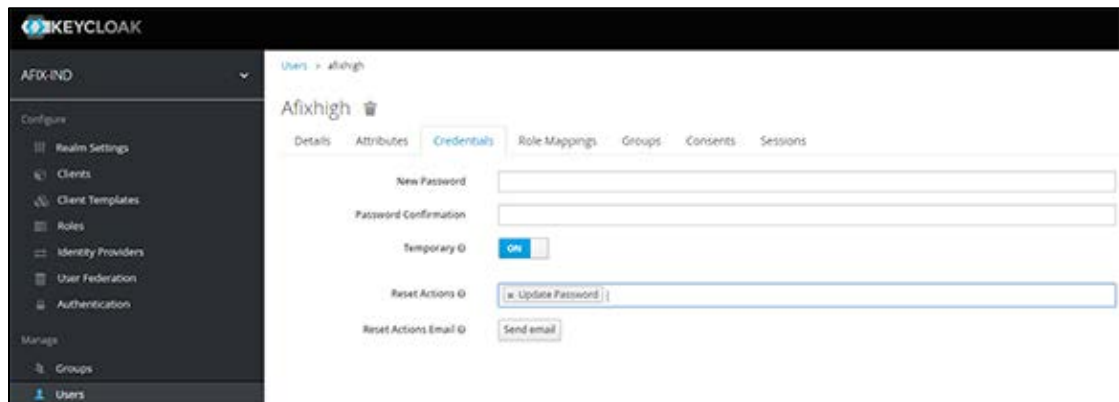
- 
- The screenshot shows the Keycloak Admin Console interface. On the left is a navigation sidebar with sections like 'Configure' (containing Realms, Clients, Client Templates, Roles, Identity Providers, User Federation, and Authentication) and 'Manage' (containing Groups and Users). The main area displays the configuration for a user named 'afixhigh'. The 'Role Mappings' tab is selected, showing four panels: 'Realm Roles' (empty), 'Available Roles' (a list of roles including 'account\_offline\_provider\_org', 'account\_offline\_provider', 'manage-users', and 'provider'), 'Assigned Roles' (empty with a 'Remove selected' button), and 'Effective Roles' (showing 'offline\_access' and 'uma\_authorization'). A 'Client Roles' section at the bottom is also visible but empty.



- From the Available Roles, select *access\_afix* and *ManageUsers*, then click Add Selected to apply the roles to the user.



- Click the Credentials tab and update the user's password. You can set a default password if you want to, but whether you do or not, make sure to select **Update Password** in the Reset Actions drop-down list and then click **Send Email**. This sends an email to the user with a link to reset their own password.



- Repeat this process for every user that needs to have Manage Users access.

## Upgrade Instructions

Before upgrading, make sure you know the location of the JSON file for the application being installed.

### Import Steps

- Log in to Keycloak
- Select the desired realm for the application suite in the top left drop-down list.
- Click **Import** on the left side menu.
- Click the **Select File** button and browse to the SMaRT AFIX release /SSO/JSON directory.

5. Select the `afix_Provider_Group.json` file and click **Open**.
6. **Important:** In the *If a resource exists* drop-down list, select **Skip**.
7. Select the `afix_ManageUsers_Role.json` file and click **Open**.
8. **Important:** In the *If a resource exists* drop-down list, select **Skip**.