

CAGRID PORTAL 2.1

Installation Guide



Center for Biomedical
Informatics and Information
Technology

This is a U.S. Government work.

October 7, 2008



caBIG™

cancer Biomedical
Informatics Grid™



Model caBIG™ Open Source Software License

v.2

Release Date: January 7, 2008

Copyright Notice. Copyright 2008 The Ohio State University Research Foundation (OSURF), Argonne National Labs (ANL), SemanticBits LLC (SemanticBits), and Ekagra Software Technologies Ltd. (Ekagra) (“caBIG™ Participant”). The caGrid 1.2 software was created with NCI funding and is part of the caBIG™ initiative. The software subject to this notice and license includes both human readable source code form and machine readable, binary, object code form (the “caBIG™ Software”).

This caBIG™ Software License (the “License”) is between caBIG™ Participant and You. “You (or “Your”) shall mean a person or an entity, and all other entities that control, are controlled by, or are under common control with the entity. “Control” for purposes of this definition means (i) the direct or indirect power to cause the direction or management of such entity, whether by contract or otherwise, or (ii) ownership of fifty percent (50%) or more of the outstanding shares, or (iii) beneficial ownership of such entity.

License. Provided that You agree to the conditions described below, caBIG™ Participant grants You a non-exclusive, worldwide, perpetual, fully-paid-up, no-charge, irrevocable, transferable and royalty-free right and license in its rights in the caBIG™ Software, including any copyright or patent rights therein, to (i) use, install, disclose, access, operate, execute, reproduce, copy, modify, translate, market, publicly display, publicly perform, and prepare derivative works of the caBIG™ Software in any manner and for any purpose, and to have or permit others to do so; (ii) make, have made, use, practice, sell, and offer for sale, import, and/or otherwise dispose of caBIG™ Software (or portions thereof); (iii) distribute and have distributed to and by third parties the caBIG™ Software and any modifications and derivative works thereof; and (iv) sublicense the foregoing rights set out in (i), (ii) and (iii) to third parties, including the right to license such rights to further third parties. For sake of clarity, and not by way of limitation, caBIG™ Participant shall have no right of accounting or right of payment from You or Your sublicensees for the rights granted under this License. This License is granted at no charge to You. Your downloading, copying, modifying, displaying, distributing or use of caBIG™ Software constitutes acceptance of all of the terms and conditions of this Agreement. If you do not agree to such terms and conditions, you have no right to download, copy, modify, display, distribute or use the caBIG™ Software.

1. Your redistributions of the source code for the caBIG™ Software must retain the above copyright notice, this list of conditions and the disclaimer and limitation of liability of Article 6 below. Your redistributions in object code form must reproduce the above copyright notice, this list of conditions and the disclaimer of Article 6 in the documentation and/or other materials provided with the distribution, if any.
2. Your end-user documentation included with the redistribution, if any, must include the following acknowledgment: “This product includes software developed by the Ohio State University Research Foundation (OSURF), Argonne National Labs (ANL), SemanticBits LLC (SemanticBits), and Ekagra Software Technologies Ltd. (Ekagra).” If You do not include such end-user documentation, You shall include this acknowledgment in the caBIG™

Software itself, wherever such third-party acknowledgments normally appear.

3. You may not use the names “The Ohio State University Research Foundation”, “OSURF”, “Argonne National Labs”, “ANL”, “SemanticBits LLC”, “SemanticBits”, “Ekagra Software Technologies Ltd.”, “Ekagra”, “The National Cancer Institute”, “NCI”, “Cancer Bioinformatics Grid” or “caBIG™” to endorse or promote products derived from this caBIG™ Software. This License does not authorize You to use any trademarks, service marks, trade names, logos or product names of either caBIG™ Participant, NCI or caBIG™, except as required to comply with the terms of this License.
4. For sake of clarity, and not by way of limitation, You may incorporate this caBIG™ Software into Your proprietary programs and into any third party proprietary programs. However, if You incorporate the caBIG™ Software into third party proprietary programs, You agree that You are solely responsible for obtaining any permission from such third parties required to incorporate the caBIG™ Software into such third party proprietary programs and for informing Your sublicensees, including without limitation Your end-users, of their obligation to secure any required permissions from such third parties before incorporating the caBIG™ Software into such third party proprietary software programs. In the event that You fail to obtain such permissions, You agree to indemnify caBIG™ Participant for any claims against caBIG™ Participant by such third parties, except to the extent prohibited by law, resulting from Your failure to obtain such permissions.
5. For sake of clarity, and not by way of limitation, You may add Your own copyright statement to Your modifications and to the derivative works, and You may provide additional or different license terms and conditions in Your sublicenses of modifications of the caBIG™ Software, or any derivative works of the caBIG™ Software as a whole, provided Your use, reproduction, and distribution of the Work otherwise complies with the conditions stated in this License.
6. THIS caBIG™ SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES (INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, NON-INFRINGEMENT AND FITNESS FOR A PARTICULAR PURPOSE) ARE DISCLAIMED. IN NO EVENT SHALL THE OHIO STATE UNIVERSITY RESEARCH FOUNDATION ("OSURF"), ARGONNE NATIONAL LABS ("ANL"), SEMANTICBITS LLC ("SEMANTICBITS"), AND EKAGRA SOFTWARE TECHNOLOGIES LTD. (EKAGRA) OR ITS AFFILIATES BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS caBIG™ SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Revision History

The following is the revision history for this document.

<i>Date</i>	<i>Version</i>	<i>Description</i>	<i>Revised By</i>
October 7, 2008	2.1.3	Corrected CVS tag and download link.	Carolyn Kelley Klinger
October 6, 2008	2.1.2	Changed upgrade command in Chapter 5.	Carolyn Kelley Klinger
October 6, 2008	2.1.1	Formatted code snippets to avoid wrapping. Converted list of values in upgrading chapter to a table.	Carolyn Kelley Klinger
October 5, 2008	2.1	Applied styles from CBIIT Word template. Changed version number throughout for 2.1 release. Added Credits section. Added registered trademark for caBIG®. Changed title page to say CBIIT. Added chapter on upgrading.	Carolyn Kelley Klinger
July 22, 2008	2.0.2.2	Corrected Yahoo URL.	John Eisenschmidt
June 28, 2008	2.0.2.1	Added caGrid license v2 and formatted.	Carolyn Kelley Klinger
June 27, 2008	2.0.2	Updated for caGrid Portal 2.0.2.	Manav Kher
December 18, 2007	2.0.1	Updated for caGrid Portal 2.0.1.	Eddie VanArsdall

Contents

Revision History.....	iv
About This Guide	1
About the caGrid Portal	1
Audience for This Guide	1
Credits and Resources	1
Chapter 1 Pre-Installation	3
Obtain the caGrid Portal Software.....	3
Download the Release	3
Check Out the Project from CVS	3
Obtain the Required Software	4
Create the Databases.....	4
Create the SSL Certificate and Keystore	5
Obtain a Google Maps API Key.....	5
Obtain Yahoo ApplicationID	5
Configure the caGrid Trust Fabric	5
Configure the caGrid Portal Installation.....	6
Chapter 2 Installation	8
Chapter 3 Post-Installation	9
Set Up the Environment	9
Start the Application Server.....	9
Import the Site Structure.....	10
Secure the Encryption Key	11
Chapter 4 Re-Installation	12
Chapter 5 Upgrading from caGrid Portal 2.0.2 to 2.1	13
Obtaining the caGrid Portal 2.1 Software	13
Download the Release	13
Check-out caGrid Portal from CVS	13
Obtain Required Software.....	14
Update Properties.....	14
Upgrade caGrid Portal Software.....	14
Update caBIG® Participant information	14
Upgrade Portal Site Structure.....	15
Chapter 6 Firewall/Connectivity Considerations.....	16

About This Guide

This guide explains how to install, deploy, configure, and run the caGrid Portal 2.1 application. It also provides prerequisite requirements for the installation.

About the caGrid Portal

The caGrid Portal is a Web-based application that enables end users to discover and interact with the services that are available on the caGrid infrastructure. The portal serves as the primary visualization tool for the caGrid middleware and provides a standards-based platform for hosting caBIG-related tools. The portal also serves as a caBIG information source. Users of the portal have instant access to information about caBIG® participants, caGrid points of contact (POCs), and caGrid-related news and events.

Audience for This Guide

This installation guide is intended for caGrid service developers, client application developers, and service administrators. Users of this guide should be familiar with Java and other programming languages, database concepts, and the Internet. This guide assumes that users intending to use caGrid resources in software applications have experience with building and using complex data systems.

Credits and Resources

caGrid Portal Development and Management Teams		
Development	Quality Assurance	Program and Project Management
Joshua Phillips ²	Aynur Abdurazik ³	Krishnakant Shanbhag ¹
Manav Kher ²		John Eisenschmidt ⁴
	Documentation	
	Carolyn Kelley Klinger ⁵	
^{1.} National Cancer Institute Center for Bioinformatics (NCICB)	^{2.} SemanticBits, LLC	^{3.} Science Applications International Corporation (SAIC)
^{4.} 5AM Solutions	^{5.} Lockheed Martin Management System Designers	

Contacts and Support	
NCICB Application Support	http://ncicbsupport.nci.nih.gov/sw/ Telephone: 301-451-4384 Toll free: 888-478-4423

Chapter 1 Pre-Installation

Obtain the caGrid Portal Software

You can obtain the caGrid Portal software by downloading the release or checking out the project from CVS.

Download the Release

To download the release, follow this link:

https://gforge.nci.nih.gov/frs/?group_id=25

Check Out the Project from CVS

To check out the project from CVS, use the settings in Table 1:

Setting	Value
Username	anonymous
Password	anonymous
Protocol	ssh
Host	cbiocvs2.nci.nih.gov
Repository	/share/content/gforge/cagrid-1-0
module	cagrid-1-0/Applications/cagrid-portal
tag	cagrid-portal-2-1_release_final

Table 1. Settings for checking out source code from CVS

If you are using a command line CVS client, use this command:

```
export CVS_RSH=ssh
cvs -d :ext:anonymous@cbiocvs2.nci.nih.gov:/share/content/gforge/cagrid-1-0 co \
-r cagrid-portal-2-1_release_final \
-d cagrid-portal cagrid-1-0/Applications/cagrid-portal
```

After checkout, the caGrid Portal source code directory (referred to henceforth as \$SRC) will be located under cagrid-portal in the current directory.

Obtain the Required Software

Before installing the caGrid Portal, make sure that you have the following applications. Set the environment variables as specified.

Application/Version	Preparation
Java 1.5	Set JAVA_HOME and make sure that the Java SDK executable is on the PATH.
Ant 1.6.5	Set ANT_HOME and make sure that the Ant executable is on the PATH.
MySQL 5+	You will need privileges to create and delete databases.

Table 2. caGrid Portal Installation Requirements

Create the Databases

The caGrid Portal application requires two databases: one for Liferay data, and one for caGrid Portal data. By convention, the names of these databases are `lportal` and `portal2`. If you are using these database names, then you need to execute the following SQL in your MySQL database:

```
create database lportal character set utf8;
create database portal2;
```

You also need to provision an account that has access to these databases. If the same account will have full access to both databases, use the following SQL:

```
grant all privileges on lportal.* to 'portalacct'@'%' identified
by 'mypwd';

grant all privileges on portal2.* to 'portalacct'@'%' identified
by 'mypwd';

flush privileges;
```

This gives the user `portalacct` all privileges on these databases. This user can access the databases from any host. For more information, see the MySQL admin documentation at <http://dev.mysql.com/doc/refman/5.0/en/index.html>.

Create the SSL Certificate and Keystore

Some pages in the portal need to be protected with HTTPS. You need to create an SSL certificate that the embedded Tomcat instance (running in JBoss) will use. The installation script will configure the Tomcat HTTPS Connector, but you still must either create a certificate and PKCS12 keystore or specify the path to an existing keystore and provide the keystore password.

To create a keystore using the Java keytool, run this command:

```
$JAVA_HOME/bin/keytool -genkey -alias tomcat -keyalg RSA -keystore /path/to/my/keystore
```

Make sure that you use the same password for the keystore and the key. When prompted for the first and last name, specify the host name.

For complete instructions on using keytool, follow this link:

<http://java.sun.com/j2se/1.5.0/docs/tooldocs/windows/keytool.html>

For instructions on configuring JBoss and Tomcat to use SSL, follow these links:

- <http://tomcat.apache.org/tomcat-5.5-doc/ssl-howto.html>
- <http://docs.jboss.org/jbossas/jboss4guide/r5/html/ch9.chapt.html#ch9.https.sect>

By default, the installation script will assume that the keystore is located at `$HOME/portal-liferay/portal-keystore` and that the keystore password is `portal`. You can configure this location and password in the properties file that the installation script uses (described later).

Obtain a Google Maps API Key

You can get a Google Maps API key at <http://www.google.com/apis/maps/signup.html/>. If your host name is `my.host.com` and the HTTP server is listening to port 8080, then the URL you should use is <http://my.host.com:8080/>. Save this key for future use.

Obtain Yahoo ApplicationID

Get an ApplicationID from Yahoo at <http://developer.yahoo.com/wsregapp/>. Save this for future use.

Configure the caGrid Trust Fabric

The caGrid Portal uses GAARDS to authenticate users, so you must configure the caGrid trust fabric on the machine that will host the portal. The portal itself will use the GTS client to maintain the trust fabric, but you must also bootstrap the trust fabric.

By default, the portal will use the `nci_prod` as the target grid. If you are using this grid, you don't need to do anything.

If you are using one of the following grids, the trust synchronization configuration has already been provided:

- `nci_dev`
- `nci_stage`
- `osu_dev`
- `training`

You will simply need to create a corresponding `build.properties` file. Look at `build-nci_qa.properties` as an example. When you run the installation script, you must specify the name of your target environment. For more information, see the next section, *Configure the caGrid Portal Installation*.

If you are using another target grid, then you need to do three things:

1. Create a `sync-description.xml` file to configure the GTS client that the portal uses.
2. Bootstrap the trust fabric by placing root certificates under the `$HOME/.globus/certificates` directory.
3. Configure the caGrid Portal to use your `sync-description.xml` configuration.

To configure the portal to use your `sync-description.xml` file and certificates, you need to edit the `aggr.trust.syncgts.file` and `aggr.trust.certs.dir` properties to the path to your `sync-description.xml` file and the directory in which the root certificates are found, respectively.

To find directions for configuring a trust fabric using caGrid tools, follow this link: http://www.cagrid.org/mwiki/index.php?title=GTS:1.1:Administrators_Guide:Syncing_With_the_Trust_Fabric

Configure the caGrid Portal Installation

The caGrid Portal installation script is at `$SRC/build.xml`. This is an Ant build file configured by the properties defined in the `build.properties` file in the same directory. To customize the installation, you can directly edit `build.properties`, or you can override those properties by adding them to the `build-local.properties` file.

If you want to maintain installation configurations for multiple deployment tiers, you can create multiple properties files with the following naming convention: `build-<tier>.properties`, where `<tier>` is replaced with the name of the tier. For example, if you create a configuration for the `testing` tier, then you would create a file named `build-testing.properties`, and then run Ant from the `$SRC` directory as follows:

```
ant -target.env=testing install
```

See the `$SRC/build.properties` file itself for descriptions of all the properties. If you are using the `nci_prod` target grid and default installation location, then you will usually only need to edit the following properties:

- `liferay.admin.password`

- `liferay.db.host`
- `liferay.db.port`
- `liferay.db.name`
- `liferay.db.username`
- `liferay.db.password`
- `cagrid.portal.admin.email`
- `cagrid.portal.db.url`
- `cagrid.portal.db.username`
- `cagrid.portal.db.password`
- `cagrid.portal.geocoder.yahoo.appId`
- `cagrid.portal.map.google.apiKey`
- `cagrid.portal.security.encryption.key`

Chapter 2 Installation

From the \$SRC directory, run the following command:

```
ant -Dtarget.env=<envname> install
```

If you have just directly updated `build.properties` or `build-local.properties`, then you would run the following command:

```
ant install
```

Chapter 3 Post-Installation

Set Up the Environment

On Windows, use the System application in the Control Panel to set the `JBOSS_HOME` environment variable to point to the directory in which JBoss was installed. By default, the variable will point to the following path:

```
%HOMEDRIVE%%HOMEPATH%\portal-liferay\jboss-4.0.5.GA
```

On Unix/Linux/Mac, the default location will be `$HOME/portal-liferay/jboss-4.0.5.GA`. You can set the environment variable in the bash shell as follows:

```
export JBOSS_HOME=$HOME/portal/liferay/jboss-4.0.5.GA
```

Start the Application Server

On Windows, do the following:

1. Navigate to `%JBOSS_HOME%\bin`.
2. Double-click `run.bat`.

On Unix/Linux/Mac, do something like this:

```
cd $JBOSS_HOME/bin
```

```
chmod u+x *
```

```
./run.sh > portal.log &
```

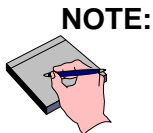
Import the Site Structure

You can configure the basic site structure by using the Liferay administrative portlets to import Liferay Archive (lar) files. These files are available in the `$SRC/portals/liferay/lars/` directory.

To import the lar files, follow these steps:

Step	Action
1.	Using your browser, go to: <a href="https://<hostname>:8443">https://<hostname>:8443 .
2.	Sign in using the following parameters: <ul style="list-style-type: none"> username: portaladmin@cabig.nci.nih.gov password: p0rtal@dmin
3.	In the upper right corner, click the Welcome drop-down menu, then select My Places > My Community .
4.	Click the icon to the right of the Private Pages text.
5.	Click the Import/Export tab.
6.	Click the Import sub tab.
7.	Select the Portlet Preferences and Portlet Data checkboxes.
8.	Click the Browse button to navigate to and select <code>portaladmin-private-community.lar</code> .
9.	Click OK .
10.	Click Import .
11.	Click the back arrow icon in the upper right corner.
12.	In the upper right-hand corner, click the Welcome drop-down menu, then select My Places > My Community > Private Pages . Note: This time, just click the Private Pages text—not the icon to the right.
13.	Using the Communities portlet, click the Communities I have joined tab.
14.	Click the Configure Pages icon for the Guest community. This is the third icon from the left showing an image of two pieces of paper.
15.	Click the Import/Export tab.
16.	Click on the Import sub tab.

Step	Action
17.	Select the Portlet Preferences and Portlet Data check boxes.
18.	Click the Browse button to navigate to and select <code>guest-community.lar</code> .
19.	Click OK .
20.	Click Import .
21.	Click the back arrow icon in the upper, right corner of page.
22.	In the upper, right corner, click the Welcome drop-down menu, then select My Places > Guest Community > Public Pages . The caGrid Portal home page appears.
23.	Sign out by selecting the Sign Out option from the Welcome drop-down menu.

**NOTE:**

If you see an error message just below the Google Map on the Home page stating that you do not have privileges to view this portlet, simply restart JBoss.

Secure the Encryption Key

A file named `cagridportal.properties` will be generated and placed in two locations on the file system:

- `$JBOSS_HOME/server/default/deploy/liferay-portal.war/WEB-INF/classes/cagridportal.properties`
- `$JBOSS_HOME/server/default/deploy/cagridportlets/WEB-INF/classes/cagridportal.properties`

The value of the `cagrid.portal.security.encryption.key` property in this file will be used to encrypt authentication tickets as well as portal users' temporary grid credentials in the database. These files must be protected so that users' grid credentials cannot be decrypted by a malicious user who has access to both the hosting system and database. Set file permissions appropriately for your system.

Chapter 4 Re-Installation

This section describes the steps needed to wipe out an existing installation and re-install. All existing data will be destroyed. See the Administrator's Guide for directions on backing up data and running batch imports of data.

1. Stop the JBoss application server.
2. Drop the `portal2` and `lportal` databases.
3. Re-create the databases.
4. From `$SRC`, run the following command:

```
ant -Dtarget.env=<env> clean install
```

Chapter 5 Upgrading from caGrid Portal 2.0.2 to 2.1

This chapter explains how to upgrade an existing caGrid Portal 2.0.2 installation to version 2.1. If you are running an older (< 2.0.2) version of Portal, it is recommended that you re-install. See *Chapter 4, Re-Installation* on page 12 for more information.

Obtaining the caGrid Portal 2.1 Software

You can download the caGrid Portal release or check out the code from CVS.

Download the Release

The caGrid Portal 2.1 release can be downloaded from GForge.

Check-out caGrid Portal from CVS

You can use the following settings to check out the source code:

Setting	Value
Username	anonymous
Password	anonymous
Protocol	ssh
Host	cbiocvs2.nci.nih.gov
Repository	/share/content/gforge/cagrid-1-0
module	cagrid-1-0/Applications/cagrid-portal
tag	cagrid-portal-2-1_release

Table 3. Settings for checking out source code from CVS for upgrade to caGrid Portal 2.1

If you are using a command line CVS client, you could use this command:

```
export CVS_RSH=ssh
cvs -d :ext:anonymous@cbiocvs2.nci.nih.gov:/share/content/gforge/cagrid-1-0 co \
-r ccagrid-portal-2-1_release \
-d cagrid-portal cagrid-1-0/Applications/cagrid-portal
```

After checkout, the caGrid Portal source code directory (referred to henceforth as \$SRC) will be located under ./cagrid-portal.

Obtain Required Software

The following software must be installed:

- Java 1.5

Make sure JAVA_HOME is set and Java SDK executable is on the PATH.

- Ant 1.6.5

Make sure that ANT_HOME is set and Ant executable is on the PATH.

Update Properties

The caGrid Portal build script uses `build-local.properties` and `build-<target.env>.properties` files for setting all its properties.

NOTE:



`build-local.properties` overrides all other properties.

You can copy these property files from your existing 2.0.x installation or simply edit these properties for your environment.

`<target.env>` is the environment in which the Portal is being installed. By default, the distribution of caGrid Portal is pre-configured for the following environments:

- `nci_dev`
- `nci_qa`
- `nci_production` (default)

Upgrade caGrid Portal Software

The following steps will upgrade the existing installation of caGrid Portal to 2.1

1. Shut down JBOSS.
2. Run `ant -Dtarget.env=nci_dev update_from_2_0_2_to_2_1`
3. Run `ant -Dtarget.env=nci_dev liferay:deploy-all`
4. Start up JBOSS.

Update caBIG® Participant information

caGrid Portal 2.1 has updated the list of caBIG® participants, that are loaded into the database when the portal is first installed. Follow the instructions here to upload the new participant information.

Upgrade Portal Site Structure

We have an updated UI layout in caGrid Portal 2.1. See http://www.cagrid.org/wiki/Portal:2.0:Installation_Guide#Import_the_Site_Structure for instructions on how to import the Site Structure into the Liferay Portal Server.

The only difference would be the source of the layout files (lars). You should use the layouts from the 2.1 distribution. These layout files are located in [cagrid-portal/portals/liferay/lars/](#).

Chapter 6 Firewall/Connectivity Considerations

By default, the portal installation script will download JBoss and several Liferay artifacts. If you are behind a firewall, you will need to provide the proxy configuration for your Java Virtual Machine. Essentially, you simply need to set the `ANT_OPTS` environment variable to include the standard Java proxy settings using the following command:

```
export ANT_OPTS="-Dhttp.proxyHost=proxy -Dhttp.proxyPort=8080"
```

For additional instructions, follow this link: <http://ant.apache.org/manual/proxy.html>.

If you have no Internet access, you can still use the installation script. You will simply need to download the dependencies manually and then edit the following properties in `build.properties` so that they point to local directories and files:

- `liferay.jboss.home`
- `liferay.jboss.zip`
- `liferay.downloads.dir`
- `liferay.dependencies.zip`
- `liferay.war`

See `build-liferay.xml` for details.