SMWS Online RecordsSMWS Online Records

Administration ManualAdministration Manual

SMWS/??SMWS/??

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# Introduction

## Logging On

To log on to the SMWS Online Records system, use a web browser and go to the site:

<http://my.sydneywildlife.org.au/>

The above address works whether you are in the office, or at home.

# User Functions

## Home

### Summary

To be Completed

### History

To be Completed

### Super Map

To be Completed

## Membership

### Summary

To be Completed

### My Details

To be Completed

### My Preferences

To be Completed

### All Members

To be Completed

### Find Members

To be Completed

### Map

To be Completed

## Animals

### My Summary

To be Completed

### New Animal

To be Completed

### My Animals

To be Completed

### My Rescues

To be Completed

### My History

To be Completed

### My Manuals

To be Completed

### Buddy Board

To be Completed

## Coordinators

### Summary

To be Completed

### My Alerts

To be Completed

### My Report

To be Completed

### Find Coordinator

To be Completed

### Coordinator List

To be Completed

## Office

### Summary

To be Completed

### New Call

To be Completed

### Vet List

To be Completed

### Vet Clinics

To be Completed

### Find Vet

To be Completed

### Vet Map

To be Completed

# Administrator Functions

## Membership

### Add Member

Use this menu item to add a new member to the system.

**NOTE:** Whilst we are continuing to use a Membership aster spreadsheet, the correct procedure for adding a member is to add them to that spreadsheet and then import the spreadsheet data to the SMWS Online Records system.

### Coordinator Types

This screen allows you to edit the coordinator types and their descriptions.

The format for a line is:

<short name> <coordinator description>

The coordinator types are displayed in the sort order by their short name.

**NOTE:** If you change the code of a coordinator type, it will not automatically update all the members that have that coordinator type set.

### Edit Courses

This screen allows you to edit the courses and their descriptions.

The format for a line is:

<short name> <course description>

The courses are displayed in the sort order by their short name.

**NOTE:** If you change the code of a course, it will not automatically update all the members that have completed that course.

### Edit Districts

This screen allows you to edit the districts and their descriptions.

The format for a line is:

<short name> <district description>

The districts are displayed in the sort order by their short name.

**NOTE:** If you change the short name of a district, it will not automatically update all the members that are assigned to that district.

## Animals

### All from yyyy & All Animals

To be Completed

### Edit Causes

To be Completed

### Edit Fates

To be Completed

### Edit Injuries

To be Completed

### Edit Species

To be Completed

## Coordinators

### Coordinator Types

To be Completed

### Edit Districts

To be Completed

### Species Link

To be Completed

## Office

### Add Vet Clinic

To be Completed

# Data Importing

## Membership

### Import Members

With the **Membership Master spreadsheet**, save the sheet as a CSV file. The default settings should word correctly.

However, there seems to be some blank data in cells to the right of the visible data. It is necessary to delete from **column AQ** to at least **column GA** (I think) to remove these valid columns that contain blank data. If this step is not executed, you will see many fields in the CSV file to the right of our usable data and the SMWS Online Records system will not be able to parse the file.

**NOTE:** With the Membership Master spreadsheet, there is no need to apply resignations, as all membership records exist in this sheet.

Run a compare first, to view the results.

#### New Members

One of the easiest tasks is to import new members only. This is relatively safe. So perform the import of new members first.

#### Update Members

Check the changes carefully before updating membership data. It may be the case that the spreadsheet does not have the correct information. You need to ensure that you do not overwrite good information with old information from the spreadsheet.

Some common errors are:

* Invalid or Zero member number. This is the case for office volunteers and other types of non-carer member. They have not traditionally been given member numbers. Assign them membership number from 90001 and up in the spread sheet to fix this problem.
* Date format problems exist in a few areas, especially when a member has left and then rejoined. The format is quite strict. These must be fixed in the spreadsheet. Also, it is important that there is symmetry between join dates and termination dates. The only one that may be absent is the last term date, meaning they are a current member.
* Member is marked as RESIGNED, but no termination date is set. Update the spreadsheet so that there is a valid termination date.

**NOTE:** After you have finished importing and updating members, please fix the member data, but executing the Fix Member Data procedure.

### Fix Member Data

This function should be executed after any new members have been added to the system.

**NOTE:** This function can take a few minutes to complete, and unlike other import functions, no data is displayed on the screen until the end of the process.

It performs the following corrections to the membership data:

* It ensures that every member has a known District, or sets the District to "Unknown" if none exists.
* Creates membership periods for any member that does not have one.
* Copies the member’s home address to the postal address, if the postal address is blank.
* Removes any coordinator flags for a member that has resigned.
* Checks that user preferences are set for users that have logged on at least once.
* It sets the GPS coordinates of a member if they do not yet exist, using their home address.

### Import Mem IDs

**NOTE:** You will need to complete this task ever time new users are added to the old Microsoft Access Database.

This import action allows you to import the unique Ids for members from the old Microsoft Access database.

Export the **tblCarers** from a recent copy of the old Microsoft Access database and first compare with the data in the SMWS Online Records system, and then repeat, importing Ids when they are blank.

## Animals

### Import Animals

This function imports animal data from the **tblAnimals** of the old Microsoft Access database.

**NOTES:**  Before importing, ensure membership data is up to date, including the import of Member IDs.

Run this import before running the corresponding import for Carers, Injuries, and Causes.

Set the year to the correct year for import.

Before importing, ensure that the **Year** of the data is correct. The old Microsoft Access database does not use the year in the animal record number, so we must add it, for the value written in the **Year** field. It will default to the current year.

Run a compare first, checking to see that the animal records do not already exist. If they do, the year of import may be incorrect.

Then run the import.

Check for errors, and correct them by making changes to the CSV file, or fixing the data in the SMWS Online Records system as appropriate. When you re-run the import, you may use either Overwrite All Animals, or **Only Import New Animals** if you want to reprocess only the previously failed records.

Common errors are:

* Member does not exist, or the member ID cannot be determined from the name. Check for spelling differences between the two systems.
* Species does not exist. Add it to the SMWS Online Records system.
* Erroneous data. Sometimes there are invalid lines in the data file causing parse errors. If the animal record number above and below are consecutive, these lines may be safely ignored.

**NOTE:** You may wish to run a comparison after all errors have been fixed before proceeding to import the Carers, Injuries, and Causes.

### Import Carers

This function imports animal data from the **tblAnimals\_Carers** of the old Microsoft Access database. It contains the carer records for each animal (not to be confused with importing member IDs, which is performed under Membership).

**NOTE:**  Ensure the animal records are successfully imported before attempting to import carers.

Run a comparison first.

Common errors are:

* Record number “00001” seems to appear in every batch of data. It can be ignored.
* Cannot convert Unique ID to a member number. This may be caused by a genuine error, or perhaps when the carer is a veterinary practice. Needs to be further investigated, especially if it’s a vet.
* Data mismatch from the CSV file. Please do not instantly assume that this is a genuine error. The CSV file presents only 1 record at a time to the system. Sometimes, a second record will exist in the data that will match and the results presented can be overzealous in reporting inaccurate differences.

### Import Injuries

This function imports animal data from the **tblAnimals\_Injuries** of the old Microsoft Access database. It contains the injury records for each animal.

**NOTES:**  Ensure the animal records are successfully imported before attempting to import carers.

This function does not unset injuries, ever.

Run a comparison first.

### Import Causes

This function imports animal data from the **tblAnimals\_Causes** of the old Microsoft Access database. It contains the cause records for each animal.

**NOTES:**  Ensure the animal records are successfully imported before attempting to import carers.

This function does not unset causes, ever.

Run a comparison first.

### Fix Animal Data

This function is currently unimplemented. It exists in case a future need develops.

## Coordinators

There is currently no data import facility for coordinators.

## Office

### Import Vet Clinics

This function imports veterinary clinic data from the **after hours spreadsheet**.

Run a comparison first.

After successful import, run the Fix Vet Data function.

### Fix Vet Data

This function performs a few corrections to the veterinary data:

* It ensures that every veterinary clinic has a known District, or sets the District to "Unknown" if none exists.
* It sets the GPS coordinates of a vet if they do not yet exist, using its address.

# Technical

## Software Summary

The table below summaries the software installed on the SMWS Online Records Server.

|  |  |
| --- | --- |
| **Software** | **Brief** |
| Ubuntu Linux | Version 12.04. The operating system. |
| Apache | The Web Server. |
| MySQL | The Database. |
| PHP | A Programming language used for applications that run within the Apache Web Server. |
| Zend Framework | A set of pre-built modules and libraries, in the language of PHP, for application development. |
| MediaWiki | A software application that for a wiki (similar to Wikipedia) that provides the core web experience for the web site. |
| PHPiCal | A software application that provides calendar services for the web site. |
| SWMLogin | A software solution for controlling the login to the entire web site. This was developed for SMWS. |
| SWM | A software solution for the SMWS Online Records section of the web site. This was developed for SMWS. |

## Diagram of Software Components

To be Completed

## Log on to command prompt

Log on to the command prompt of the SMWS Server by use a Secure Shell (SSH) client to connect to **my.sydneywildlife.org.au** .

The recommended SSH client software for a PC is called PuTTY (<http://www.chiark.greenend.org.uk/~sgtatham/putty/>).

You will need a username and password to connect to the SMWS Server command prompt. You should always use your personal log in to gain initial access to the machine. For example, user names like sferguson, and twhite.

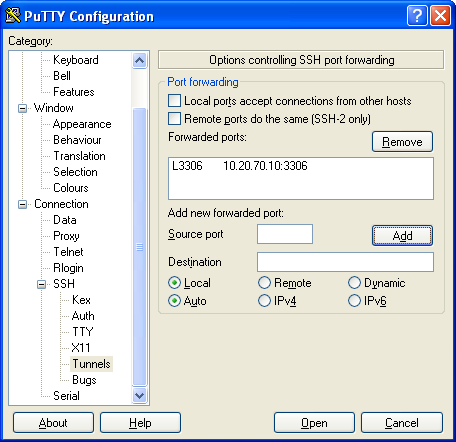
**Secret:**

www-data httpd2070

root w11d11fe

### Port for MySQL Connection

In order to allow connectivity to the MySQL database for your PC’s Microsoft Access, you will need to enable the port **3306** to be forwarded with your PuTTY session, as illustrated below.



## Adding Command Prompt Users

To be Completed

## Connect to Web Database Editor

The software called PHPMyAdmin provides a web based interface to the MySQL Database. To connect to is from a browser, go to the site:

<http://my.sydneywildlife.org.au/phpmyadmin/>

**Secret:**

root w11d11fe

## Upgrade SMWS Software

The SMWS software comprises two packages, called:

* SWMlogin; and
* SMW

When you upgrade this software you will be effectively copying a new version of the software from the TIG development servers. Only perform this task in coordination with TIG, to avoid leaving the software in an unstable state.

To upgrade the SMWS software do the following:

* Log on to the command prompt of the SMWS Server.
* Set your user as www-data. ( su – www-data )
* Change to the directory /rep1/wwwdocs/sydwildlife/swmlogin .
* Perform a CVS update. ( cvs update –d )
* Change to the directory /rep1/wwwdocs/sydwildlife/swm .
* Perform a CVS update. ( cvs update –d )
* Exit. ( exit )

## Connect Microsoft Access to the Database

**Note:** In order to connect to the SMWS Online Records database from home, you must have an active SSH connection running. This will securely enable port 3306 to be forwarded from your local PC to the SMWS Online Records database.

### Diagram of Connectivity

SMWS Server

**MySQL Database**

PC

**Microsoft Access**

Data Sources (ODBC)

System DSN

(MySQL connector)

PuTTY

Secure Shell (SSH)

Secure encrypted connection

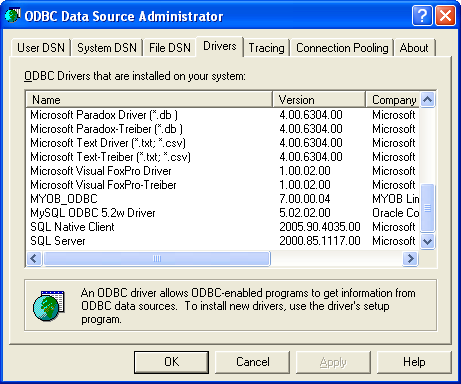
Redirected Port 3306

Redirected Port 3306

### Installing the MySQL ODBC Connector

To check to see if your PC has the necessary MySQL ODBC connector:

* Open the **Data Sources (ODBC)** application in the “Administrative Tools” control panel.
* Click on the **Drivers** tab.
* Look for a driver called **MySQL ODBC 5.2w Driver** or a newer version as illustrated below.



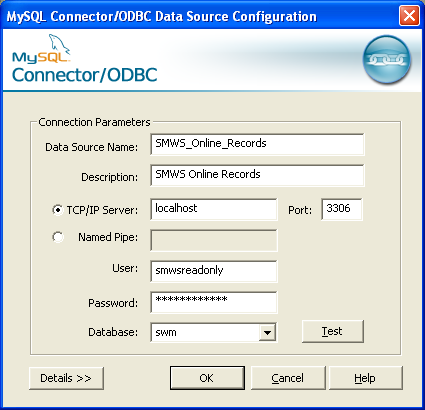
If it does not exist, download and install the relevant ODBC connector from <http://www.mysql.com/downloads/connector/odbc/> .

### Create a System DSN

The Data Source Name (DSN) is the component that actually connects to the remote MySQL database (SMWS Online Records). You must tell your PC how to connect to the remote database by creating a System DSN.

To create the system DSN, do the following:

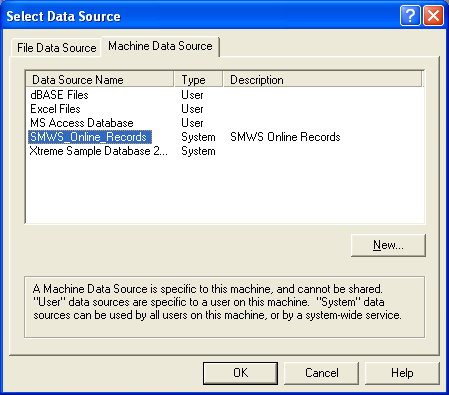
* Open the **Data Sources (ODBC)** application in the “Administrative Tools” control panel.
* Click on the **System DSN** tab.
* Click **Add…**
* Select the driver called **MySQL ODBC 5.2w Driver** or newer version.
* Press the **Finish** button.
* A configuration dialogue box will appear as illustrated below. Enter the following information:
* Data Source Name: SMWS\_Online\_Records
* Description: SMWS Online Records
* TCP/IP Server: localhost
* Port: 3306
* User: smwsreadonly
* Password: smwsread2070
* Database: swm



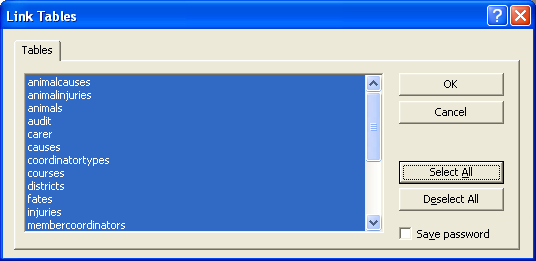
* Press **OK** to close the MySQL connector window.
* Press **OK** to close the Data Sources (ODBC) application.

### Linking the SMWS data to Microsoft Access

* Start Microsoft Access.
* Create a new Blank Database.
* From the **File** menu, select **Get External Data** 🡪 **Link Tables…**
* An Open File dialogue box will appear. Change the **Files of Type** selection to **ODBC Databases**.
* This will cause a different dialogue box to appear for Select Data Source. Select the tab for Machine Data Source (analogous to System DSN), and select the SWMS\_Online\_Records entry as illustrated below.



* Press **OK**.
* A Link Tables dialog window will appear. Select all tables as illustrated below.



* Press OK

Once this is complete, you will be able to use the data in the SMWS Online Records system within Microsoft Access.

**Notes:** The connection described here is **READ ONLY**.

Any user that knows the password for this connection technique will have read only access to ALL DATA in the system. Any restrictions that exist via the web login will not be enforced using this technique.

You may save changes to the layout of the database, as well as queries, reports, and other aspects of Microsoft Access. You will not however be able to change any data from Microsoft Access.

Multiple people can be connected concurrently.

## Connect OpenOffice Base to the Database

**NOTE:** In order to connect to the SMWS Online Records database from home, you must have an active SSH connection running. This will securely enable port 3306 to be forwarded from your local PC to the SMWS Online Records database.

Using OpenOffice Base is unlikely to produce desirable reports unless you add the extension **Oracle Report Builder** (previously known as Sun Report Builder). This gives Microsoft Access like reports to the OpenOffice Base application.

This technique should work with OpenOffice Base and LibreOffice Base on Windows, Linux, and Mac.

<http://www.openoffice.org/>

<http://www.libreoffice.org/>

### Diagram of Connectivity

SMWS Server

**MySQL Database**

PC, Mac, Linux

**OpenOffice Base**

**Utilising JDBC plugin MySQL Connector/J**

PuTTY

Secure Shell (SSH)

Secure encrypted connection

Redirected Port 3306

Redirected Port 3306

### Installing the MySQL JDBC Connector/J

To check to see if your PC has the necessary MySQL JDBC Connector/J:

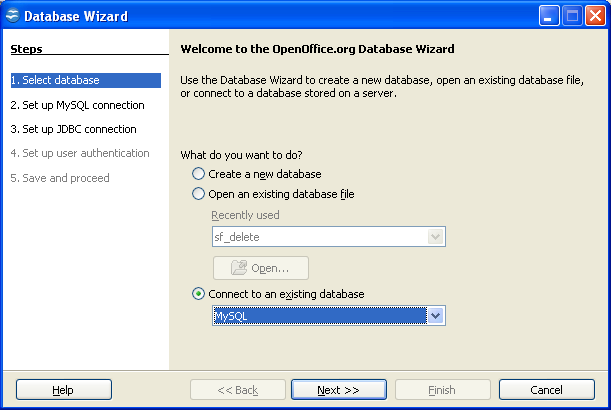
* Start OpenOffice Base.
* Select **Connect to an Existing Database**.
* Select **MySQL** from the drop down list, then press **Next>>**
* Select **Connect using JDBC (Java Database Connectivity)**, then press **Next>>** .
* Press the **Test Class** button.
* If you receive the message The JDBC driver was loaded successfully, as illustrated below. You have the connector installed.



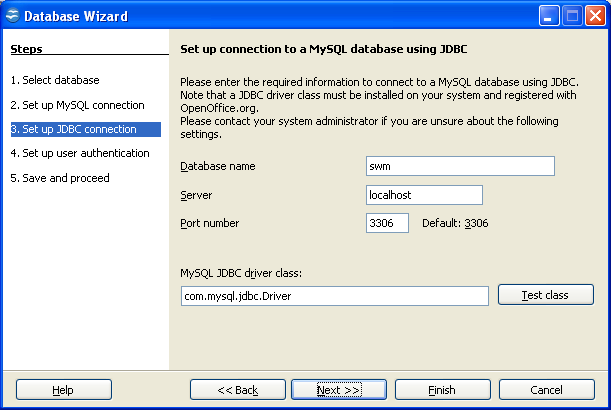
Should installation be required, refer to the instructions at <http://wiki.openoffice.org/wiki/Connect_MySQL_and_Base> and download the connector software from <http://www.mysql.com/products/connector/> .

### Linking the SMWS data to OpenOffice Base

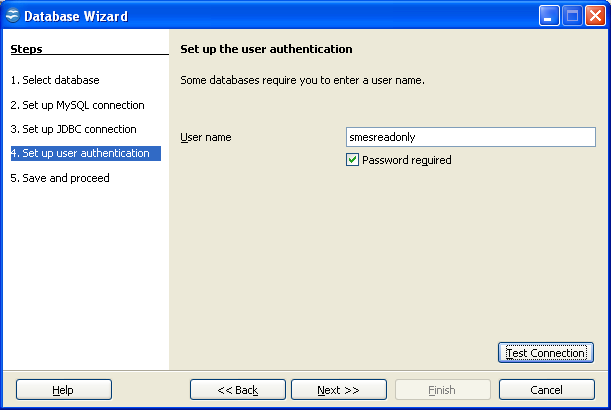
* Start OpenOffice Base.
* Select **Connect to an Existing Database**.
* Select **MySQL** from the drop down list, then press **Next>>**



* Select **Connect using JDBC (Java Database Connectivity)**, then press **Next>>** .
* Set the connection with the following details, as illustrated below, then press **Next>>**:
* Database: sw
* Server: localhost
* Port number: 3306



* Enter the user name of **swmsreadonly** and check the **Password required** checkbox, as illustrated below.

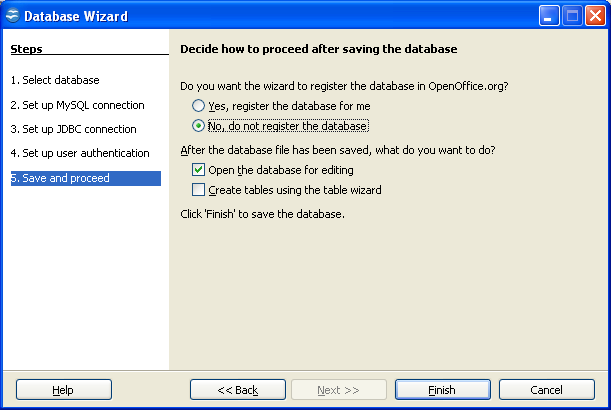


* Press the Test Connection button.
* Here you will need to enter the password to continue.

**Secret:**

password smwsread2070

* Press **Next>>**.
* Select **No, Do not register the database**, as illustrated below.



* Press **Finish.**

Once this is complete, you will be able to use the data in the SMWS Online Records system within OpenOffice Base.

**Notes:** The connection described here is **READ ONLY**.

Any user that knows the password for this connection technique will have read only access to ALL DATA in the system. Any restrictions that exist via the web login will not be enforced using this technique.

You may save changes to the layout of the database, as well as queries, reports, and other aspects of OpenOffice Base. You will not however be able to change any data from OpenOffice Base.

Multiple people can be connected concurrently.