

DataShare

Installation Guide

**Redbridge** a better place to live



London Borough of

**Redbridge**



v1.5

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# Pre-requisites

A DataShare installation comprises three parts:

* A web site
* A database
* A Windows service for automating uploads and sending email reminders

The following servers are required:

Web Server

* Microsoft Windows Server 2008+
* Microsoft Internet Information Services (IIS) 7
* Microsoft .NET 4
* MVC 3
* SQL Server Management Objects (v10)
* See <http://technet.microsoft.com/en-us/library/cc268240.aspx> for hardware guidance

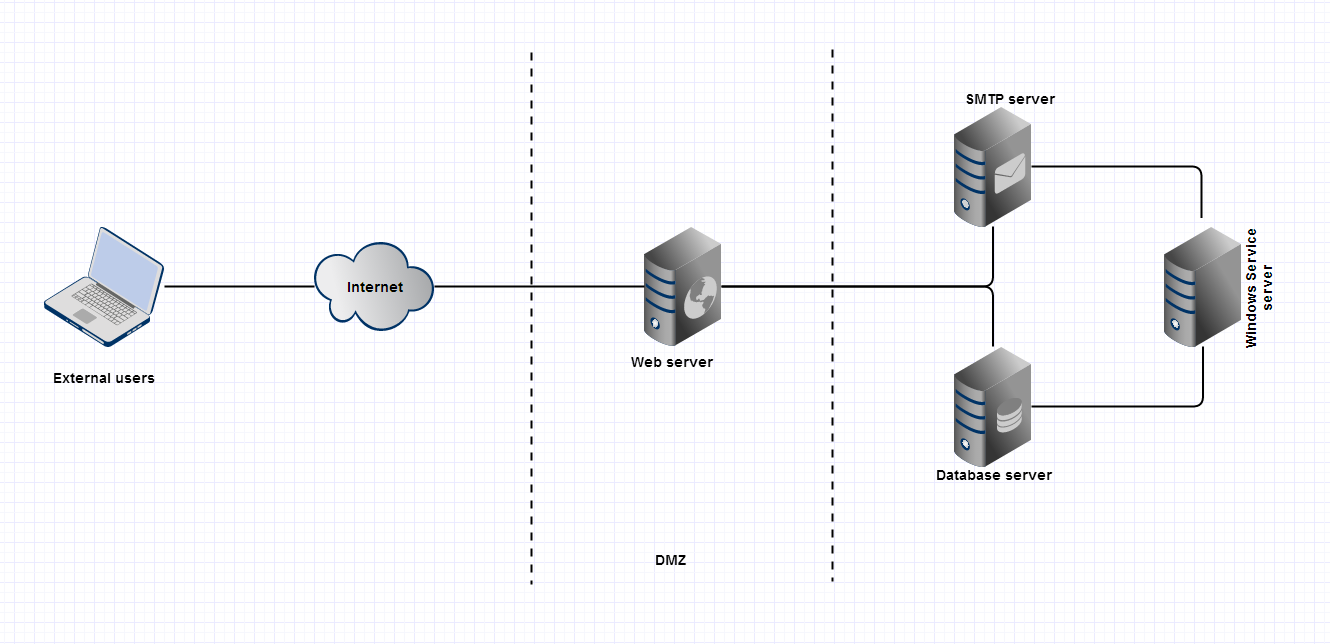
Database Server

* Microsoft Windows Server 2008+
* Microsoft SQL Server 2008
* See <http://msdn.microsoft.com/en-us/library/ms143506.aspx> for hardware guidance

Windows Service Server

* Microsoft Windows Server 2008+
* Microsoft .NET4
* MVC 3

# Network diagram overview



# Locate the necessary files

The files needed for installation are:

* A **DataShare.msi** installation file.
* A **DataShareService.msi** installation file.
* A copy of the DataShare administrator’s guide (DataShare Admin User Guide v1\_5.pdf)
* The release notes for this version of DataShare (DataShare Release Notes v1\_5.pdf)

# Installing DataShare v1.5

The following steps will install or upgrade the DataShare web site and supporting database.

**Before upgrading an existing DataShare installation please ensure both the current web site files and database are backed up.**

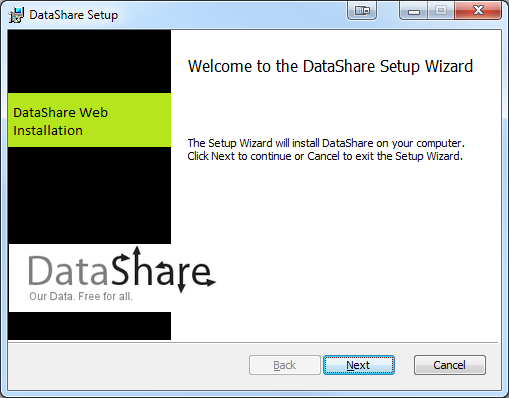
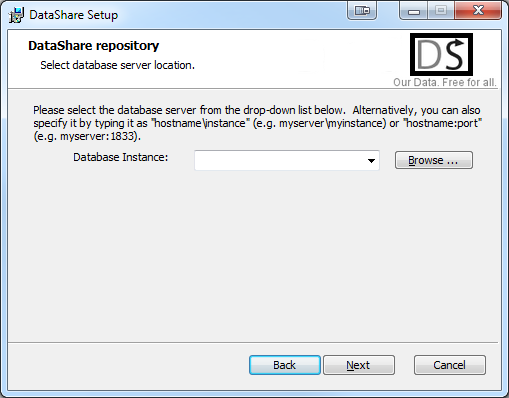
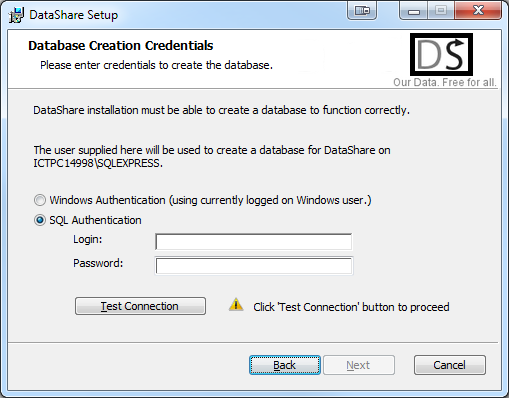
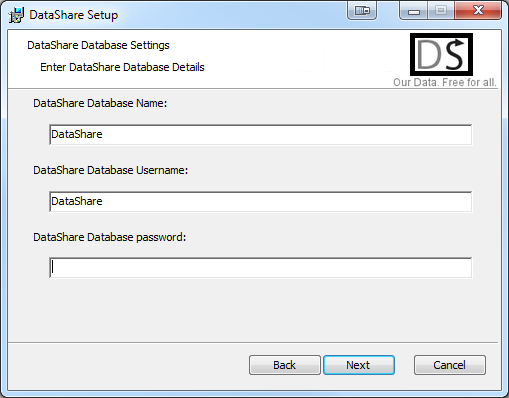
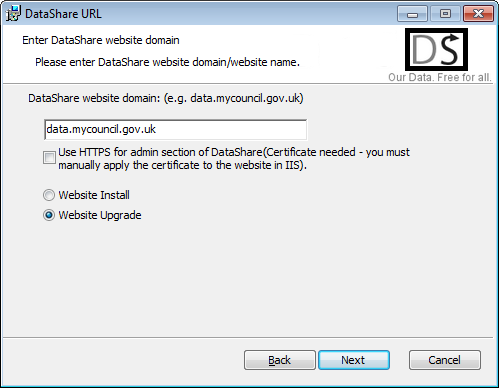
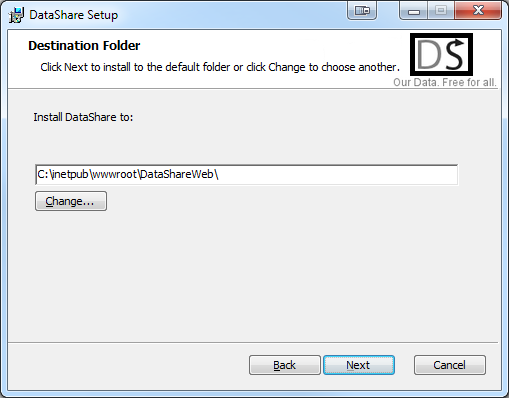
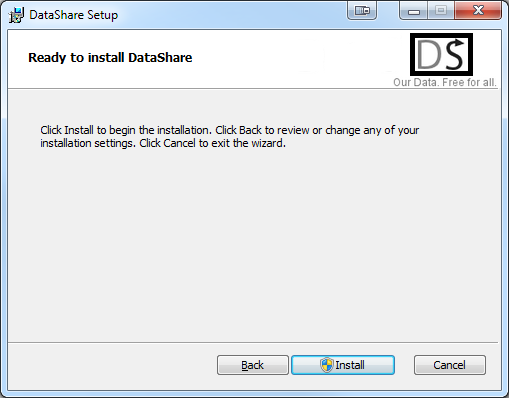
Please note that the installation process differs depending if you are:

* Upgrading from any version prior to 1.4 or performing a new installation.
* Upgrading from version 1.4

## New installation / Upgrade from a version prior to 1.4

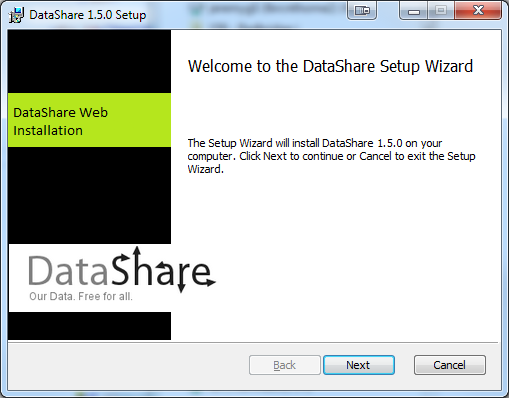
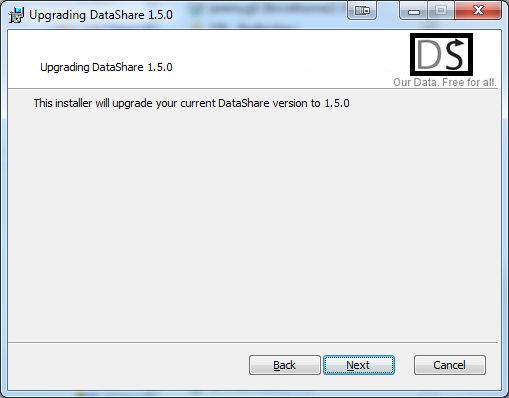
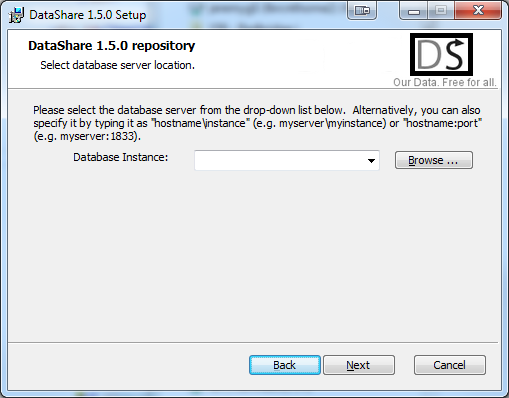
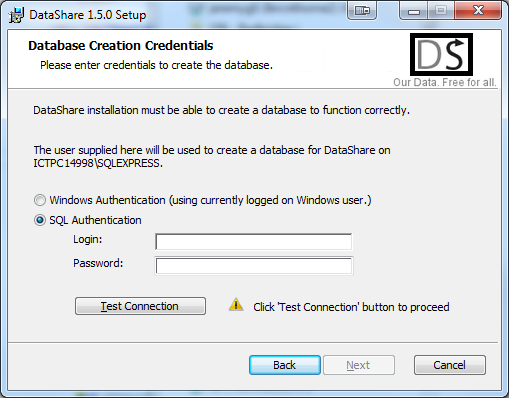
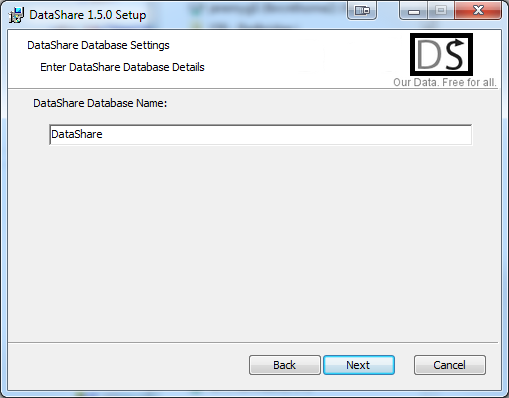
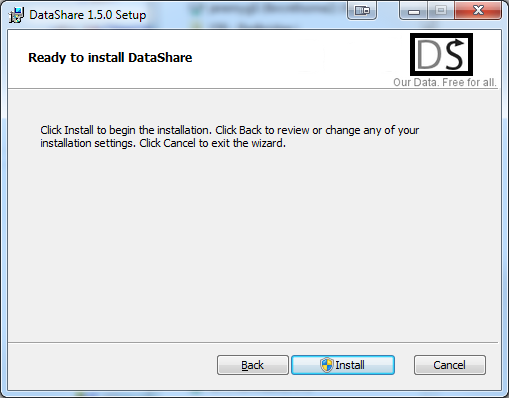
During the installation you may be prompted for the following information. You may find it helpful to have these details to hand before you begin.

|  |  |
| --- | --- |
| Database server details | The name (or IP address) and access credentials of the database server on which the DataShare database is to be installed or upgraded. |
| Web site domain | The domain name to be used for the DataShare web site.  NB: If you wish to use SSL (https) to access the DataShare admin area you will need to apply your certificate to the web site created once the installation is complete. |

* On the web server, run DataShare.msi to begin the installation process.
* Click Next to continue. 
* Select or enter the name/IP address of the database server instance you wish to use.
* Click Next to continue. 
* Select an appropriate method of authentication (and if necessary enter the credentials) of a user that has sufficient permissions to create a database on the server named previously.
* Click the Test Connection button to ensure the credentials are valid.
* Click Next to continue. 
* If you are performing a new installation you will need to enter a name for the database you wish to create (e.g. DataShare) and the name and password of a user to be created to allow the web site to connect to the database. **For an upgrade to an existing installation please ensure that the details you enter here match those of your current DataShare database.**
* Click Next to continue.
* Enter the domain name you are/will be using for your DataShare site. NB: Please enter the domain name only (i.e. do not specify http://)
* Tick the check box if you wish to use SSL (https) to access the admin area of DataShare. You will need to manually apply the SSL certificate to the web site in IIS once the installation process is complete.
* Select whether to install the website and associated IIS application pool or upgrade an existing installation of the DataShare website.
* Click Next to continue. 
* Select the folder where the web site files should be installed.
* Click Next to continue. 
* Click Install to complete the installation.
* For a new installation, once the DataShare web application has installed you will need to manually replace the Redbridge logo image files with those of your own Authority. These are named CouncilLogo.png and can be found in \Content\images and \Areas\Admin\Content\images folders beneath the folder where the DataShare web files were installed.  
    
  The replacement files **must be named CouncilLogo.png** and should be **no wider than 220 pixels and no taller than 63 pixels** in size.  
    
  **This step is not necessary when upgrading an existing installation.**

## Upgrade from version 1.4

To upgrade DataShare from version 1.4:

* On the web server, run DataShare.msi to begin the upgrade process.
* Click Next to continue.
* The installer will detect that you are upgrading and display the following:
* Click Next to continue.
* Select or enter the name/IP address of the database server that hosts your DataShare database.
* Click Next to continue.
* Select an appropriate method of authentication (and if necessary enter the credentials) of a user that has sufficient permissions to alter the database on the server named previously.
* Click the Test Connection button to ensure the credentials are valid.
* Click Next to continue.
* Enter the name of the current DataShare database.
* Click Next to continue.
* Click Install to complete the upgrade.

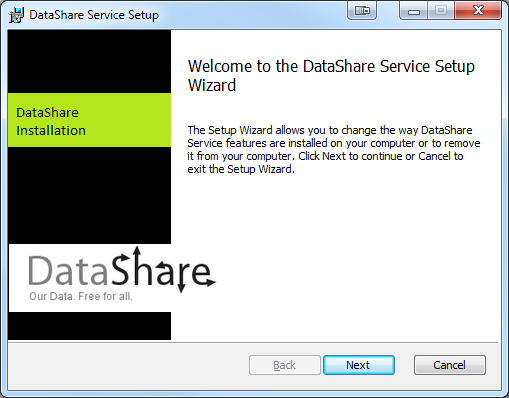
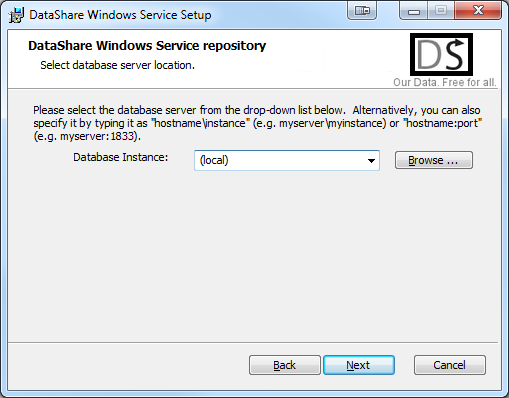
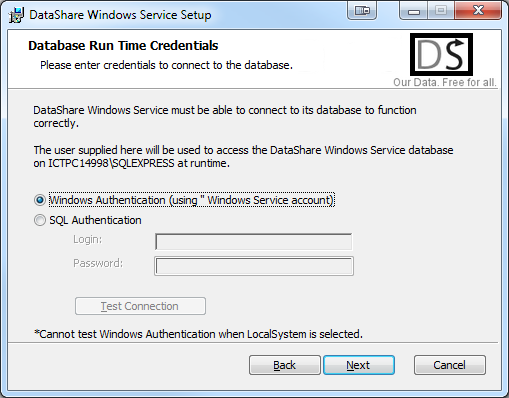
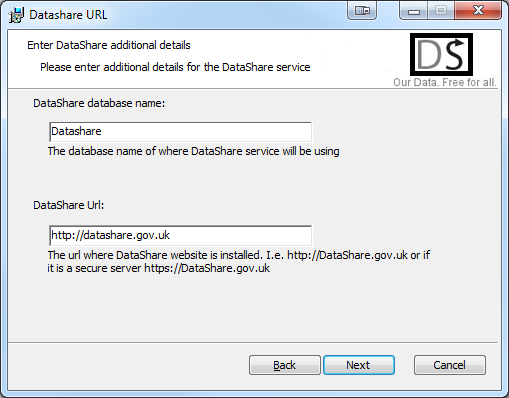
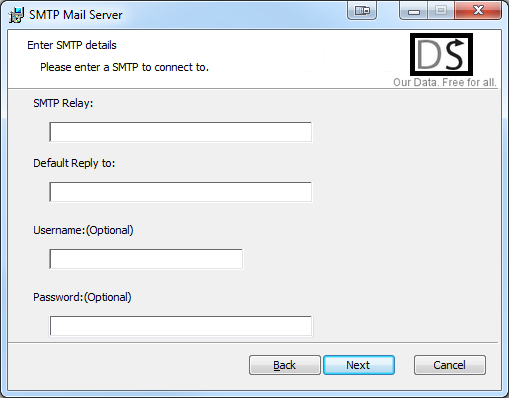
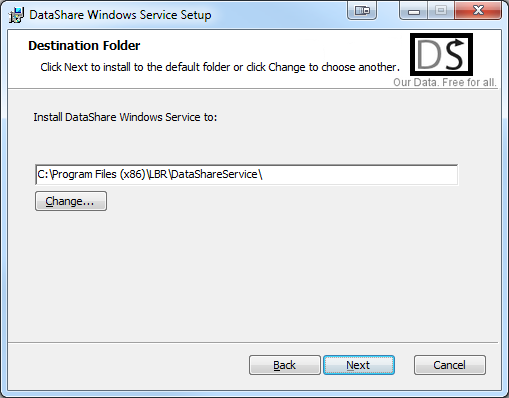
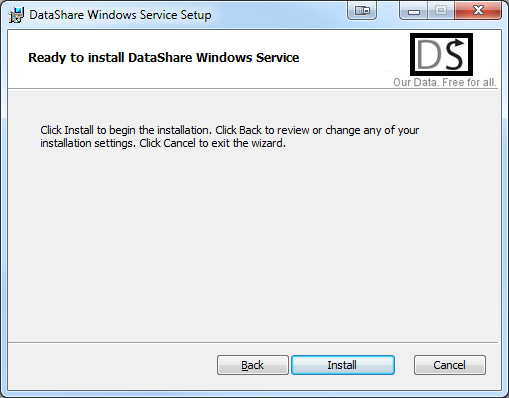
# Installing the DataShare Service

Please note that these steps apply only to a new installation or an upgrade from a version prior to 1.4. There is no need to perform these actions if you already have the DataShare Service installed.

The following steps will install the DataShare email notification and automatic upload service.

During the installation you will be prompted for the following information. You may find it helpful to have these details to hand before you begin.

|  |  |
| --- | --- |
| Database server details | The name (or IP address) and access credentials of the database server on which the DataShare database is installed. Note that Windows Authentication won’t work so a SQL user must be setup in advance. |
| Web site URL | The URL of the DataShare web site. |
| SMTP Server details | Details of the SMTP server to be used to send email notifications. |

* On the appropriate server, run DataShareService.msi to begin the installation process. 
* Click Next to continue. 
* Select or enter the name/IP address of the database server instance where the DataShare database was created.Click Next to continue. 
* Enter the credentials of the DataShare SQL database user.
* Click the Test Connection button to ensure the credentials are valid.
* Click next to continue. 
* Enter the name of the DataShare database and URL of the DataShare web site.
* Click Next to continue. 
* Enter the details of the SMTP mail server that the service will use to send email reminders.
* Click Next to continue. 
* Select the location where the DataShare service files should be installed.
* Click Next to continue. 
* Click Install to complete the installation.

# Run the website

1. Open a browser and go to http://<datashareurl>/admin
2. For a new installation please use the following credentials to log on to the site:

Username: admin

Password: p4ssword

**NB: Once logged in click the Change password button to change the admin user’s password.**

Upgraded installations will need to use their existing Super Administrator credentials.

1. Complete the system set up using the Edit system configuration menu option. You will be asked to provide the following details:

|  |  |
| --- | --- |
| Council Name | The name of your authority. |
| Council URL | The URL of the main council website. |
| Council URI | The URI of your authority on the DCLG linked open data portal, e.g. the URI for Redbridge is <http://opendatacommunities.org/id/london-borough-council/redbridge>.  The URI that can be found at <http://opendatacommunities.org>. |
| Spatial Geography URI | The spatial geography URI of your Authority on the ONS linked data portal, e.g. the spatial URI for Redbridge is <http://statistics.data.gov.uk/id/statistical-geography/E09000026>.  The URI can be found at <http://statistics.data.gov.uk/explore>.  Entering this value will automatically set the map view options below. |
| Analytics Tracking Ref | If you wish to use Google Analytics to track visits to DataShare you must provide the tracking ID of the property you will be using. |
| Feedback email | The email address that email notifications for feedback/contact us submissions should be sent to. Leave this blank if you do not wish to receive such notifications. |
| SMTP Server | The name or IP address of the SMTP server. This **must** be provided if an email address is entered above. |
| SMTP Username/Password | The credentials to use to access the SMTP server (if required). |
| Geographic centre | The longitude and latitude of the point that you would like any map view to be centred on.  You can set these easily by dragging the marker on the map to the required location. |
| Default map zoom | The zoom level you would like any map view to start on. This should be a number between 1 (the whole world) and 18 (individual streets).  You can also set this value by adjusting the zoom control on the map displayed. |

When updating from version 1.4 you should only need to supply the email/SMTP settings.

Click the ***Save*** button.

1. For new installations confirm that Upload is working correctly:
   1. Go to Add and edit categories and create a new Category.
   2. Go to Create and edit schemas and create a schema.
   3. Go to Upload and edit data and upload a test dataset.

For more detailed instructions on these steps please refer to the DataShare Admin User Guide.