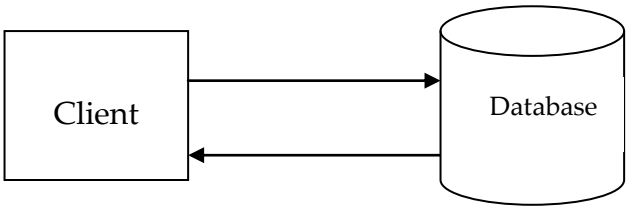
Installation Guidelines (MySQL database & Archivists' Toolkit client)

Understanding the Toolkit Architecture

The Archivists' Toolkit requires both a client and database to function. The client is installed on your work computer; the database can be installed on either a networked server or locally on your work computer. The client provides the interface that you interact with, and the database stores the data you enter.



Installing the Archivists' Toolkit requires several key steps:

1. Downloading and installing the Archivists' Toolkit client available from http://archiviststoolkit.org/download/release/2_0

2. Downloading the MySQL server and MySQL Administrator from http://www.mysql.com/downloads (Select MySQL Community Server - free download)

3. Installing the MySQL server

4. Configuring the MySQL server

5. Creating a MySQL database

6. Initializing the MySQL database to work with the Archivists' Toolkit client

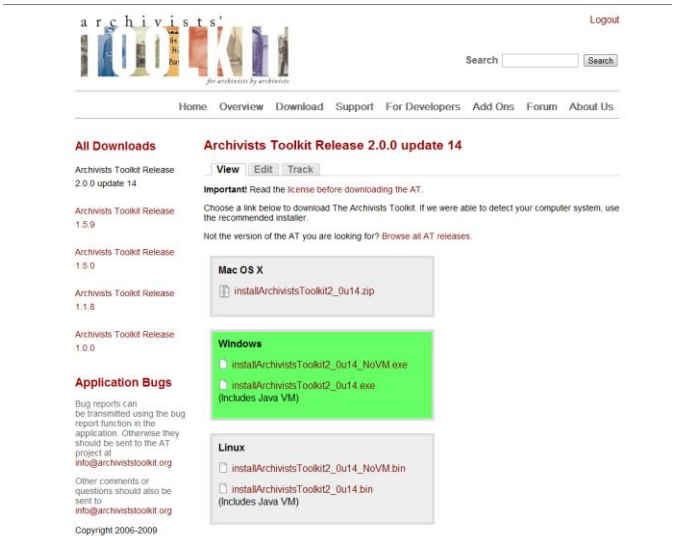
7. Launching the AT and pointing to the MySQL database

*Note: Ask for local technical assistance if you have access to it. Otherwise, progress through the installation guidelines slowly and carefully. There is a high risk of frustration if you do not enter a setting correctly.

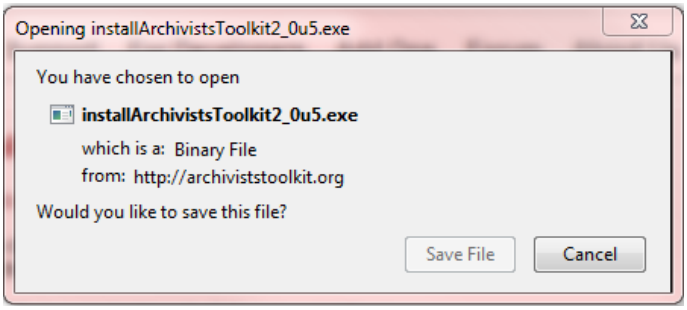
Note: These steps have to be done only once, with the exception on entering the user name and password in step 7, which has to be every time the application is launched.

Note: The following guidelines describe installing the AT on a Windows or OS X machine.

1. Download the Archivists' Toolkit client applicable to your operating system from http://archiviststoolkit.org**.** If you are unsure whether you have Java already installed, select the download that includes Java VM. Double click on the download file and install the application of your machine.



Double click on the file to download, then this window will open. Click on '**Save file'**.



2. Downloading MySQL database server

- Open the MySQL download page at http://www.mysql.com/downloads/
- Select download under the **MySQL Community Server** label and follow the link to the download.

- Select download for the type of installation (Windows, Linux, MAC, etc.). For Windows, download the **Windows (x86) ZIP/Setup.EXE**. For MAC users, determine your exact OS X version before downloading and download the .dmg package of the mysql-max.

- You will be prompted to become a registered user. This step is optional.

- Download mysql-gui tools from: http://dev.mysql.com/downloads/gui-tools/5.0.html. The installer is added to targeted area of client computer (or the .dmg disk image file for Mac OS X).

3: Installing MySQL Database Server (for Mac with OS X 10.4.*, there are more in depth command line instructions to be found at http://developer.apple.com/internet/opensource/osdb.html)

Windows	Mac
PC users • Unzip the **Windows (x86) ZIP/Setup.EXE** and double click the install icon. **MySQL server 5.0 setup wizard** will be launched (see figure 1)	Mac users • Double-click the downloaded **mysql-max-*.dmg** file • Double click the **mysql-max*.pkg** icon (see figure 2)

Figure 1

- Choose a **Complete** install. click **Next** until the sign-up (you may skip the sign-up if you wish)
- Make sure the checkbox for **Configure the MySQL Server now** is checked
- Click on **Finish**

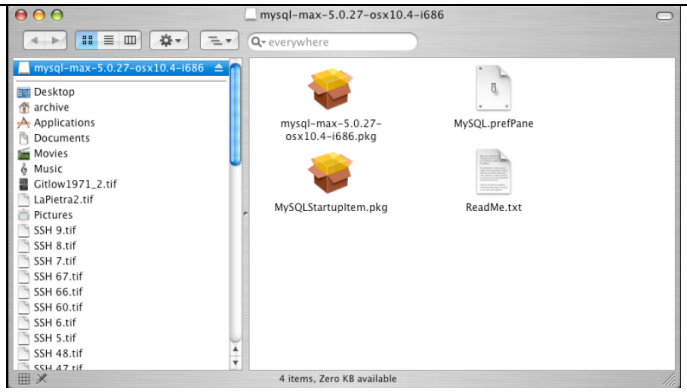


Figure 2

- The OS X installer will open. Click **continue** until installation finishes

4: Configuring MySQL Database Server Locally (for a networked installation see section 8)

PC users

- You should see the **MySQL Server Instance Configuration Wizard** (if not you may find it in start/programs/MySQL/ MySQL Server Instance Configuration)
- Click on **Next**
- Select option for "Detailed Configuration" and click on **Next**
- Select option for "Developer Machine" and click on **Next**
- Select option for **Multifunctional Database** and click on **Next**
- Accept Default Drive and Path settings and click on **Next**
- Select **Decision Support (DSS)/OLAP** and click on **Next**
- Accept selection of **Enable TCP/IP Networking**, Port number = **3306**, and **Enable Strict Mode** and click on Next
- Select **Best Support of Multilingualism** (supports the UTF8 character set used by AT) and click on **Next**
- Select **Install as Windows Service** and **Include Bin Directory in Windows PATH** and click on **Next**
- Select **Modify Security Settings** and enter and confirm a **Root** password. Make note of this password, as it will be need to entered into the MySQL administrator
- ***If installing in a network environment*** (see section 8) select **Enable root access from remote machine**. Otherwise, leave it unselected.

Mac users

- Double click the MySQLStartupItem.pkg icon
- The OS X installer will open. Click **continue** until installation finishes
- Double click the MySQL_prefPane.pkg icon
- The OS X installer will open. Click **continue** until installation finishes. The **System Preferences** will now contain an icon for MySQL. When you see the prompt shown below (figure 3) and it states that "The MySQL Server Instance is stopped," click the **Start MySQL Server** button and make sure that "Automatically Start MySQL Server on Startup" is clicked. The prompt should then state that: "The MySQL Server Instance is running."

Figure 3

- Open the downloaded MySQL gui tools .dmg file and a window will open that will prompt you to drag the application icon into your **Applications** folder.

- Click on **Next**
- Click on **Execute**

If you receive a "Connection Error" because a firewall is prohibiting access to
port 3306, you will have to change the settings [else, skip to step 5]:
To do so on Windows machines:

- Open the Control Panel
- Open Windows Firewall
- Click on Exceptions tab
- Review list of programs and services to make sure MySQL does
- not appear
- Click on "Add Port" button
- Enter "MySQL" as name
- Enter "3306" as Port number
- Accept selection of TCP
- Click on OK
- Review list of programs and services to make sure MySQL now
- appears there
- Click OK
- Return to MySQL configuration wizard
- Click on "Retry" on "Connection Error" dialogue
- Click on "Finish"

Figure 4

- Open the **MySQL Administrator** now installed in your **Applications** folder. Upon opening, you will first be prompted to sign in.
- For local installation enter “localhost” in the server hostname box.
- Enter port 3306 (or whichever port you wish to use)
- Sign-in as “root” and enter a password (If you have never established “root” as a user, the default password is blank).

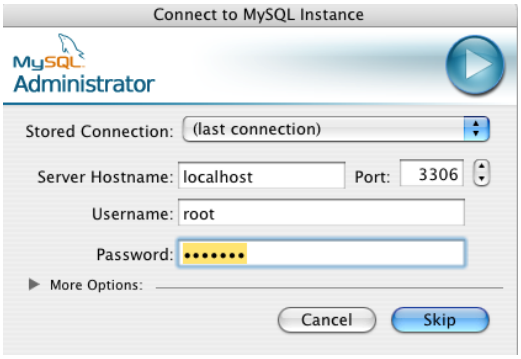


Figure 5

5. Creating a MySQL database

PC users

- Open the downloaded MySQL gui tools set-up icon. Follow instructions (figure 7) for **Complete install** and click **Next** until finished.
- Open the newly installed **MySQL Administrator** from the program files in your **Start** menu

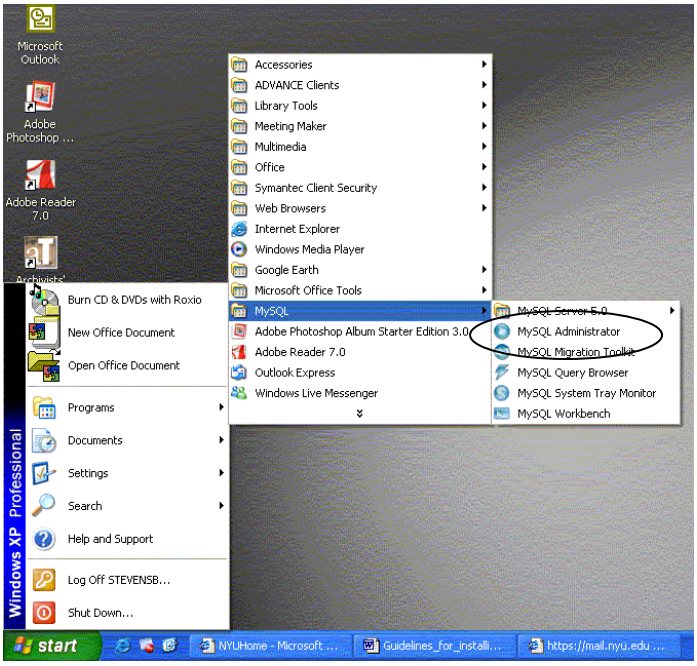


Figure 7

- Upon opening, you will first be prompted to log-in to MySQL

Mac users

- After signing in, you will be shown your connection settings to the MySQL server you have just installed and started (see figure 6 below)

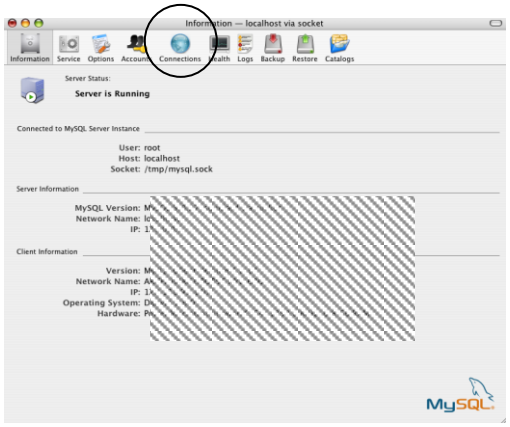


Figure 6

- If you already have a password for “root” you may skip this step. If your password for “root” was blank, you will need to set a password by going to the **Accounts** menu (see figure 9 below), choose the user: “root” from the left hand side of the screen and enter and confirm a password.

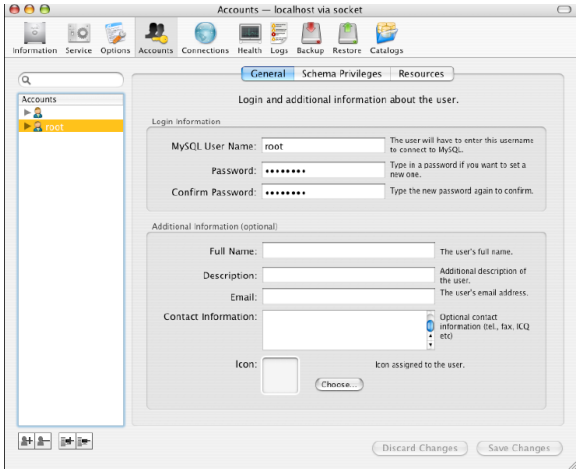


Figure 9

Figure 8

- For this local installation enter “localhost” in the server hostname box.
- Enter port 3306 (or whichever port you chose in step 3)
- Sign-in as “root” and enter the password you established for “root” in step 3.
- After signing in, you will be shown your connection settings to the MySQL server you have just installed and started (see figure 11 below).

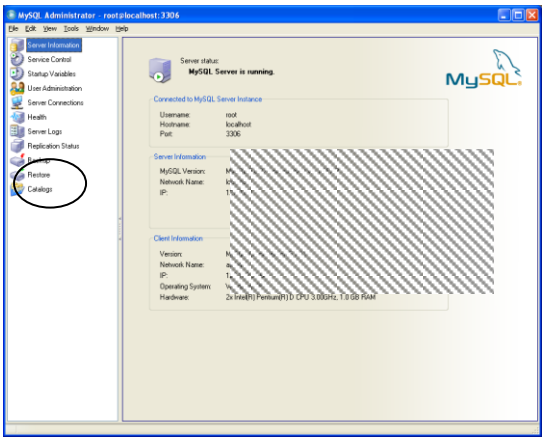


Figure 11

- Click **Catalogs** (figure 11) in the top menu. This will list all the MySQL schemas or databases found in your system (figure 13). You will then add a schema for your Archivists’ Toolkit installation to your system.
- Click **Catalogs** (figure 6) in the top menu. This will list all the MySQL schemas or databases found in your system (figure 7). You will then add a schema for your Archivists’ Toolkit installation to your system.

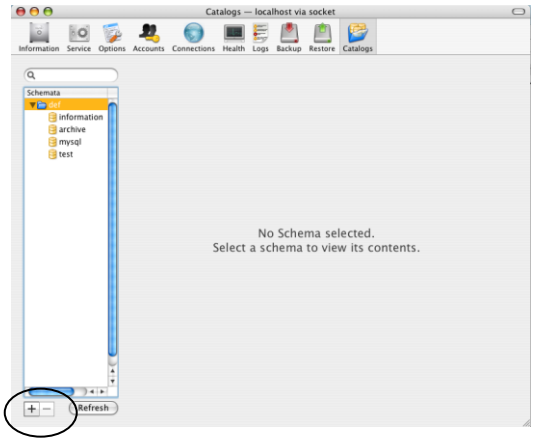


Figure 10

- Click the “plus sign” to create a new schema or database
- You will be prompted to name the schema any name you wish. In this example “toolkit” is used.

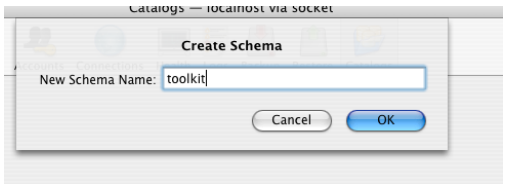


Figure 12

- Click “OK.” You will then see your schema in the **Catalog**. You have now created a database that you will configure using a configuration application from the downloaded Archivists’ Toolkit application.

- Right mouse click in the Schemata list as shown below (see figure)

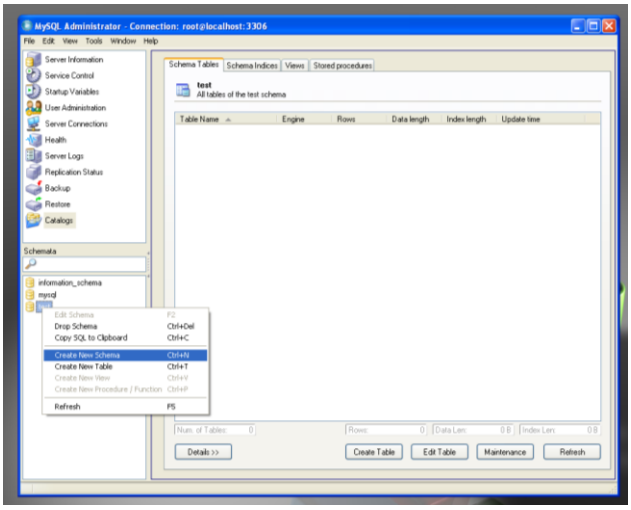


Figure 13

- Click Create New Schema to create a new schema or database

- You will be prompted to name the schema any name you wish. In this example "toolkit" is used.

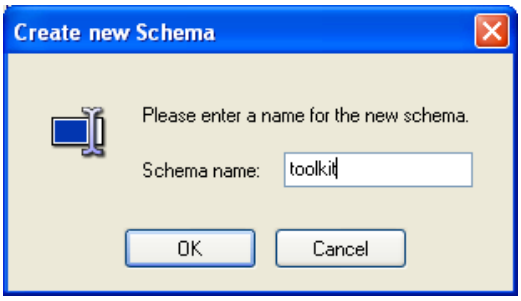


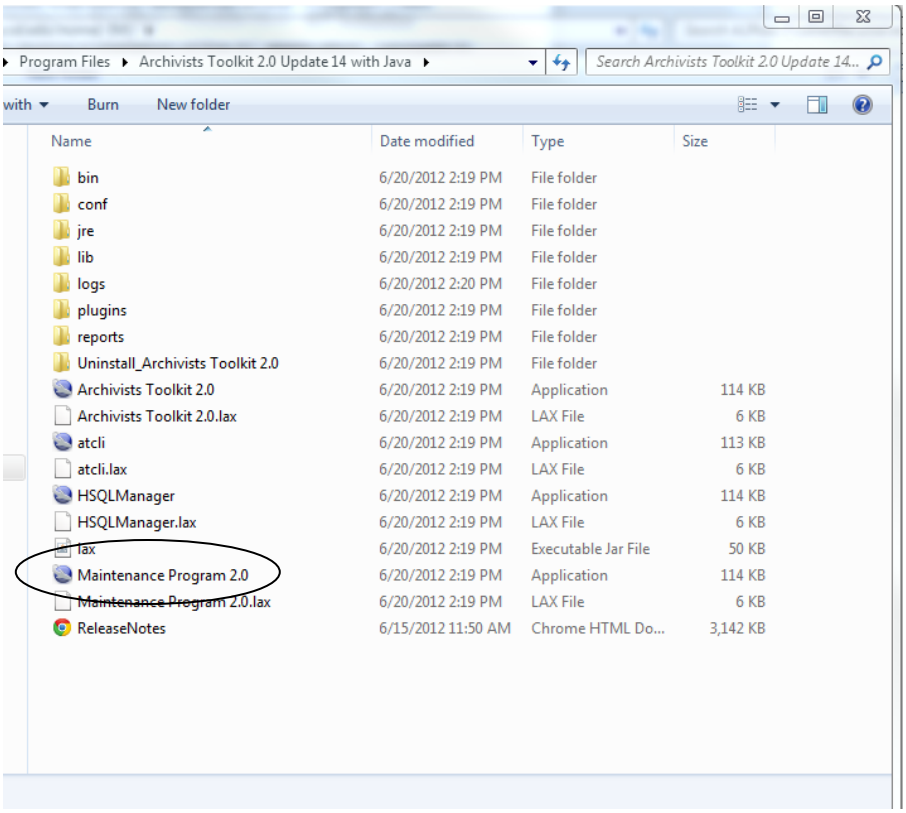
Figure 15

Click "OK." You will then see your schema in the **Catalog**. You have now created a database that you will configure using a configuration application from the downloaded Archivists' Toolkit application.

6: Initializing database for the Archivists' Toolkit

To proceed, you must have downloaded and installed the Archivists' Toolkit application.

- Find the “Archivists’ Toolkit application folder that will by default be in the “Program Files” directory on the PC or the “Applications” folder on the Mac. Double click: **Maintenance Program 2.0**. (If you chose another location during installation of the AT application, navigate to where you pointed the installer and locate the Initialize Database application.)

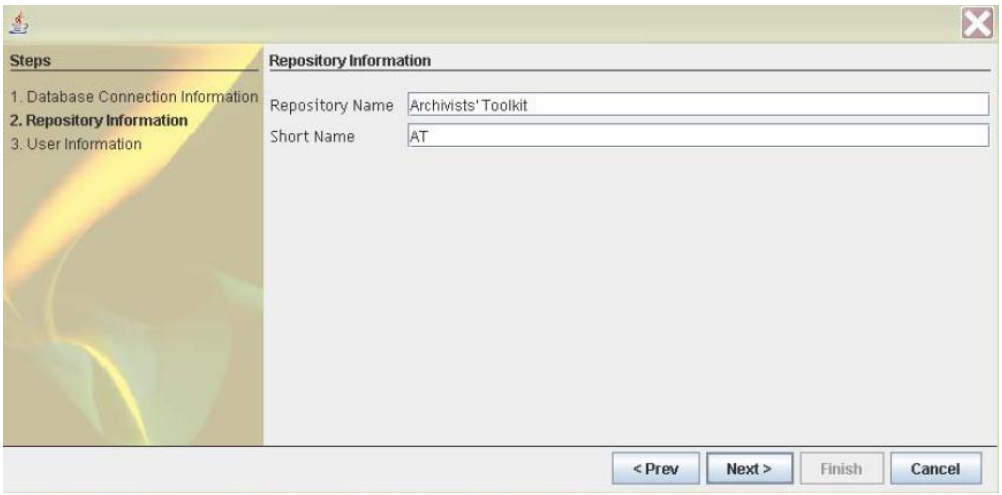


- Once opened, the application will prompt you for the connection URL, Username and Password.

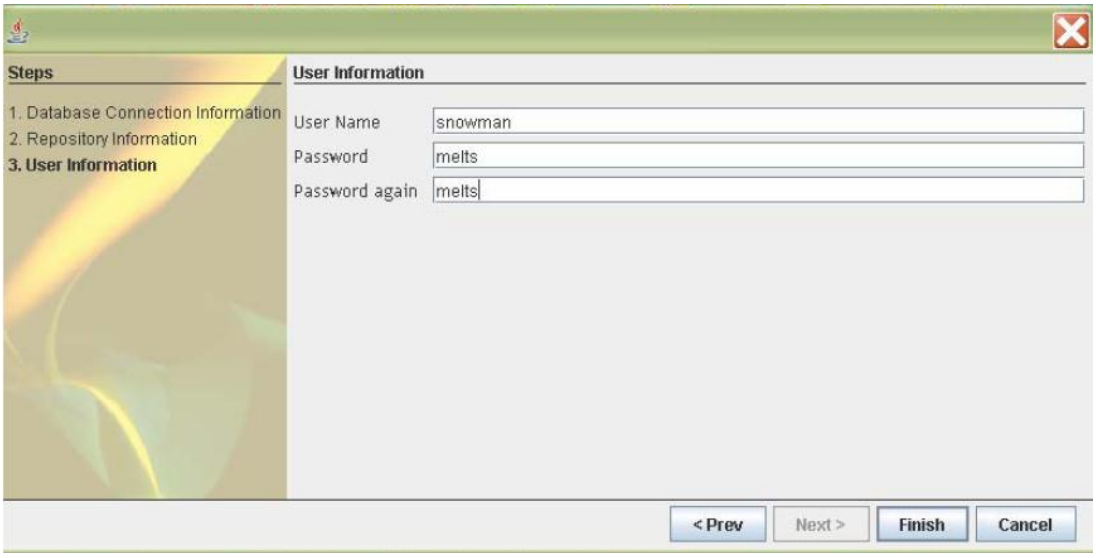
- Enter the database location and database name in the Connection URL box. For this local installation example, enter: jdbc:mysql://localhost:3306/toolkit (where “jdbc:mysql://localhost” is the location of the MySQL server you have installed, “3306” is the port where the server is accessed, and “toolkit” = the database you created when configuring MySQL).

- Enter the User name: “root” in the Username box

- Enter the Password you earlier assigned to “root”
- Click on **Next**
- Enter your full repository name in the corresponding box.
- Enter a short version of the repository name in the box below.

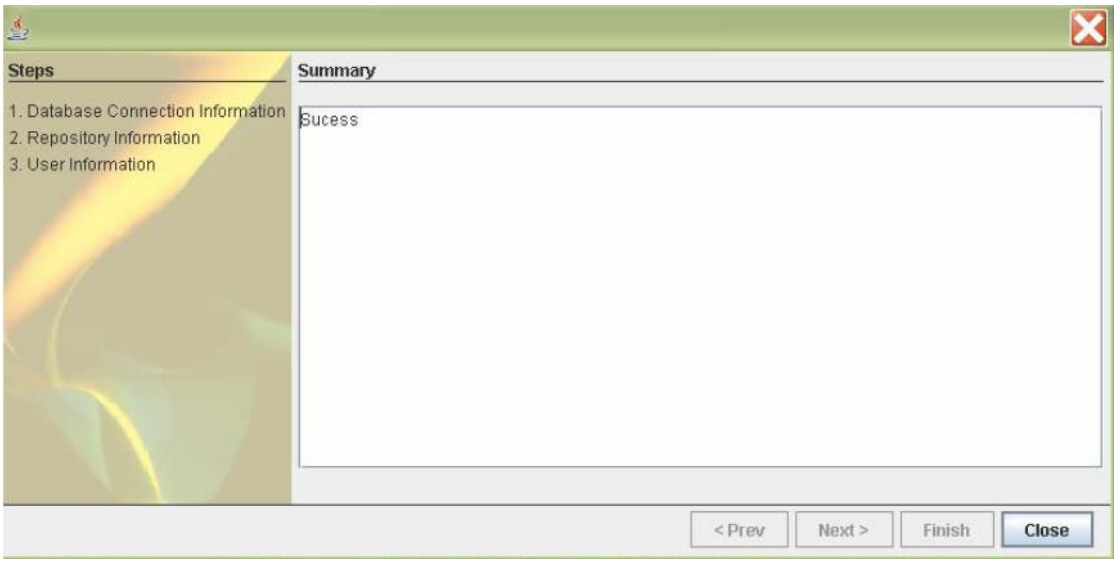


- Click on **Next**
- Enter an Archivists’ Toolkit user name (in this example “snowman”)
- Enter a password (in this example “melts”)
- Enter the password again to confirm it.



This user name and password are different than those for the MySQL database. They are for the AT client. Thus, it is best if they are different than those used for the MySQL database. Make note of the values used for user name and password, as they will be required for connecting the AT client to the database below.

- Click on finish
- The program will begin to initialize the specified database. The bar at the bottom of the dialogue box will indicate the progress of the process.
- A successful initialization will conclude with the summary dialogue box indicating "Success." (misspelled in this screenshot)



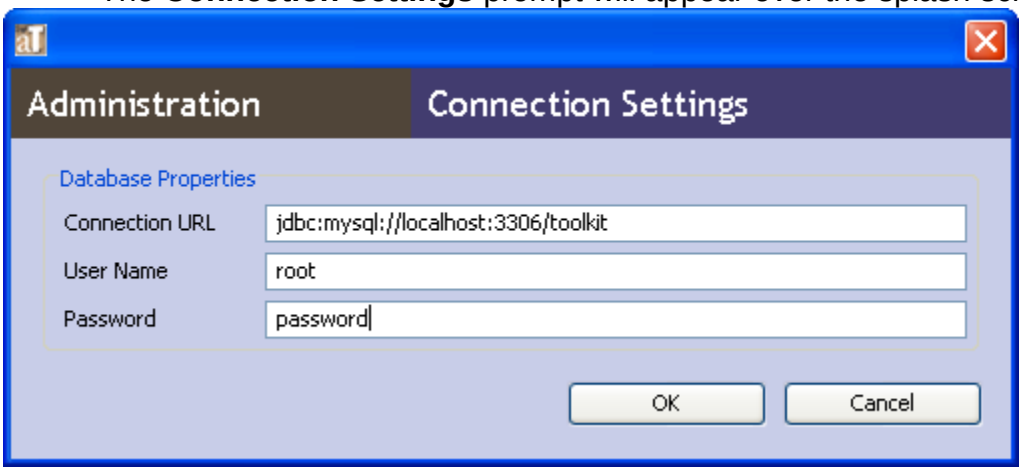
- Click **Close**

7: Launching the AT and pointing to the MySQL database

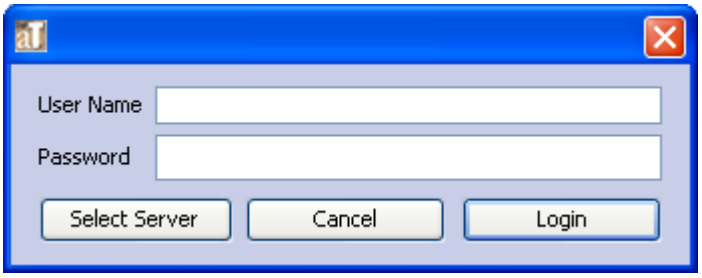
- Find the application icon  and launch the Archivists' Toolkit application. (Windows installation by default creates this launch icon in the start menu, programs/Archivists' Toolkit. OS X installation by default creates this launch icon in the Applications folder.) The application launches with the "splash" screen below.

splash screen

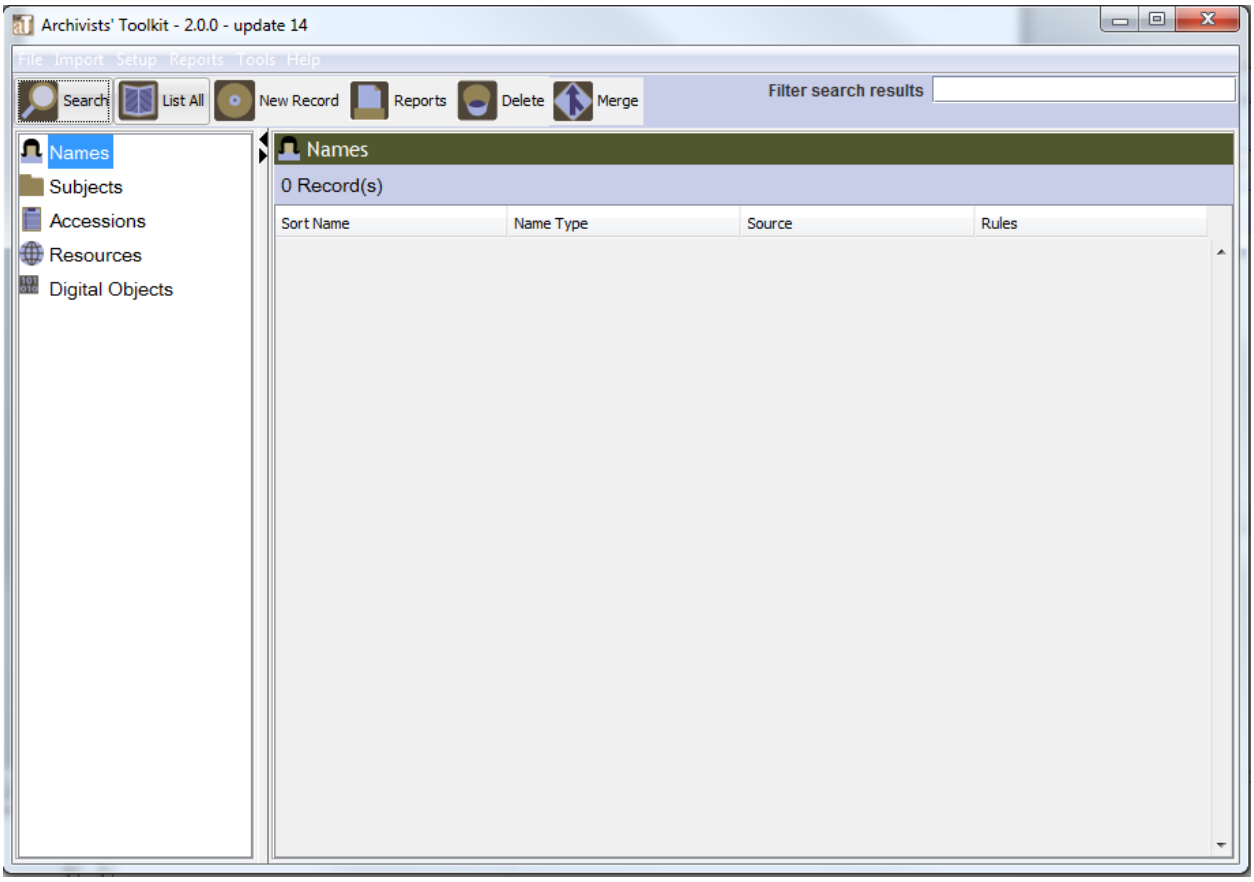
- The AT will recognize that this is the first time it has been launched and prompt the user to configure the application.
- The **Connection Settings** prompt will appear over the splash screen.



- Enter the values used for initializing the database in step 6 in the Connection Settings fields.
- Connection URL: jdbc:mysql://localhost:3306/toolkit
- Username: “root”
- Password: [the password you set for root] Note: these values have to be identical to what was used for initializing the database or the connection will fail.
- Click on **OK**
- The User logon dialog will appear next.
- Enter your **User Name** and **Password** into the Archivists’ Toolkit user logon dialogue; this is the same username and password specified during the database initialization process above. Note, the user name and password must be identical to those used in the initialization process, or the connection will fail.



- Click on Login
- The client will continue to load its component parts and then the initial screen will open on the desktop

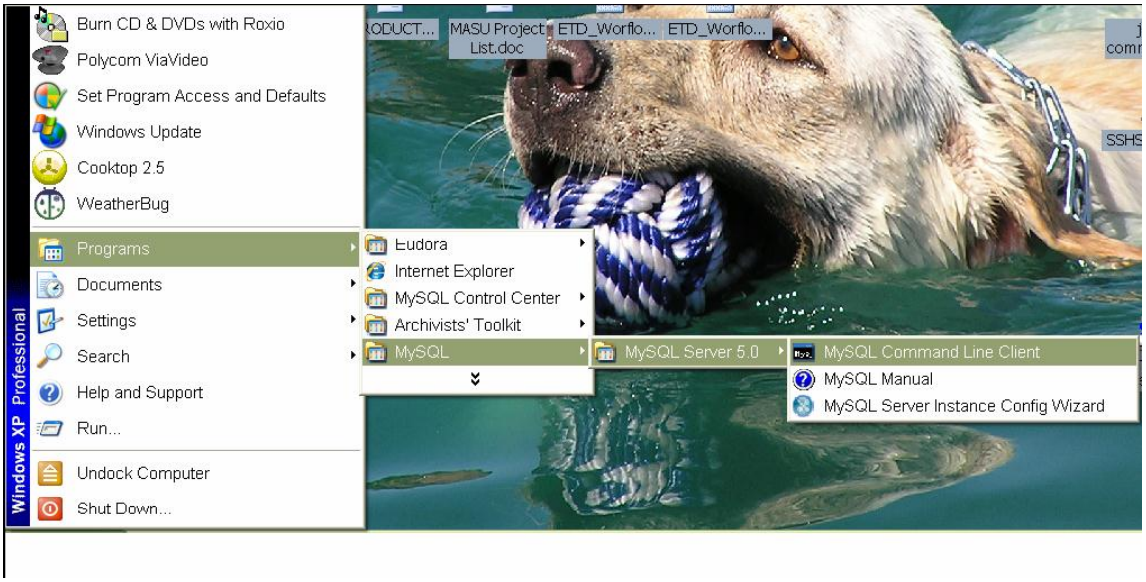


- Congratulations! You have successfully created an AT database and connected the Archivists' Toolkit client to it. From this point forward, consult the Archivists' Toolkit user manual for directions in creating, editing, manipulating records and working with the application generally.

8: Networked implementation

For a network installation in which the AT application will be used by different remote computers:

- Open "MySQL Command Line Client" from programs menu



- Enter the password you specified for the root password and hit return. A welcome message will be returned followed by a MySQL prompt: "mysql>"

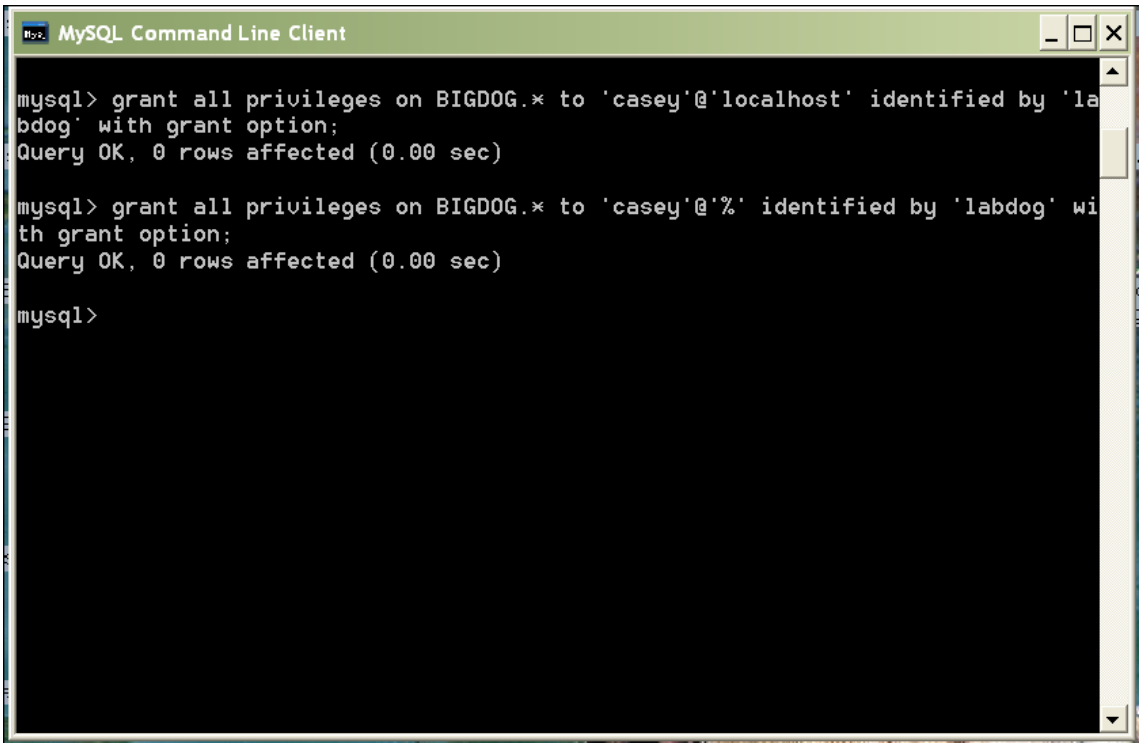
- Create an empty database by entering the command:

```
create database [DB NAME] default character set 'utf8'
default collate 'utf8_general_ci';
```

("[DB NAME]" can be assigned to any name you choose; however, the name needs to be expressed in all uppercase characters)

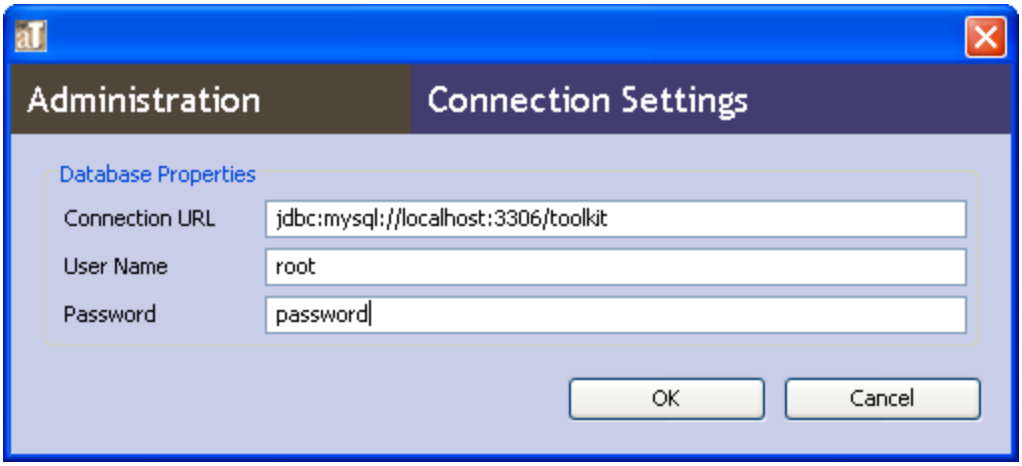
```
grant all privileges on [DB NAME].* to
'[YourUserNameHere]'@'%' identified by
'[YourPasswordHere]' with grant option;
```

• Hit return.



Note: The second user definition allows for multiple users to access a single machine. This is desirable for a networked environment. But it does create certain security risks to the machine hosting the database. It is best to consult with your network administrator before implementing this user definition.

- Using the IP address of a networked machine, other users on the network may connect to the database in the following manner: substitute a the IP or server address of the machine that stores the database, and where you see **localhost** in the connection setting prompt shown below, enter that address. For example: jdbc:mysql://122.100.0.1:3306/toolkit, where 122.100.0.1 is the machine that holds the network accessible database “toolkit”.


Administration
Connection Settings
Database Properties
Connection URL
jdbc:mysql://localhost:3306/toolkit
User Name
root
Password
password
OK
Cancel