Lucid® Key Server

Help Documentation

Help for the Lucid Key Server

Welcome to the Lucid Key Server, one member of the Lucid family of products. For more information on other Lucid and related products, please visit the Lucidcentral website at http://www.lucidcentral.org

The Lucid Key Server has been designed to enable the management and serving of Lucid keys on the Internet or corporate Intranet. The Lucid Key Server incorporates tools for managing storage and access to keys using the latest Lucid Online Player technology.

Contents

System Requirements

Hardware

The minimum hardware requirements for the Lucid Key Server are those that meet the Apache/Tomcat/MySQL and the expected user loads.

Software

Lucid Key Server

- Apache HTTP Server 2.2.x
- Apache Tomcat 5.5.x or later
- MySQL 5.0 or later

Media Upload Applet[*]

- Java Virtual Machine v1.5.0 or greater

* The Media Upload Applet is only used during the key upload process by key authors and administrators. Java is not a requirement for key users.

What is a Java Applet?

An applet is a program written in the Java programming language that can be embedded in an HTML page, in much the same way as images are included. When you use a Java technology-enabled browser to view a page that contains an applet, the applet's code is transferred to your system and executed by the browser's Java Virtual Machine (JVM).

How to check if you have Java installed

Java Runtime Environment (JRE) version 1.5.0 or greater must be installed for the Media Upload Applet to run successfully. To check if you have Java installed on your system, type the following command in a Command prompt (Windows) or Terminal console (Mac, Unix):

java -version

If you receive an "Unknown Command" error message or your Java build number is less than 1.5.0 then you need to install the latest (free) edition of the JRE, which can be found at http://www.java.com

For help installing the JRE please see: http://www.java.com/en/download/help/index.xml

Using the Lucid Key Server

Browsing and Viewing Keys

To browse for keys click on the ***Keys*** link in the main menu bar. The *Keys* page will list all keys available for use. Certain keys may only be available to users who have registered or are members of certain user groups, see the topic *Registering and Logging In* for more information.

If the key you have selected has a custom start page defined you will be taken to this page, otherwise the key will open in the Lucid Online Player and you can begin your identification session.

Registering and Logging In
To be able to upload keys to the Key Server you need to register a user account.

Certain keys posted to the Key Server may also be restricted to registered users, or users in specific user groups. To acccess these keys you will need to register and login. To join a specific user group you will need to contact your Key Server system administrator.

It may be the case that registrations are disabled, in this instance you will need to contact your Key Server system administrator to have a user account enabled.

To login, click on the ***login*** link on the main menu bar. The login page will be displayed, you are required to enter your email address and password to authenticate.

If you have forgotten your password you can click on the ***Forgotten Password*** link to have it reset and emailed to you.

The User Control Panel
The *User Control Panel* is accessed by logging in and clicking on your **email address** in the main menu bar.

The *User Control Panel* consists of two sections, **User Profile** and **Your Keys**, which are accessed using the menu on the left of the screen.

The **User Profile** section of the User Control Panel allows you to manage your user profile. The **User Profile** page displays your current email, password and profile details.

The **Your Keys** section of the *User Control Panel* allows you to upload and manage your keys. The **Keys** page displays the list of keys *you* have uploaded in a table, this includes the key title, the date last updated, and the key status (enabled/disabled).

> *Hint: If you do not see the Add Key link then the Key Server administrator has disable the add keys functionality for your account.*

To manage your profile click on the **User Profile** link from the *User Control Panel* side menu. The *User Profile* page displays your current email, password and profile information.

Changing your Email Address

To change your email address click on the **Edit Email** link.

On the *Edit Email* page enter the new email address and press submit. If the email address is valid an email will be sent to the specified email address asking you to confirm the change.

Changing your Password

To change your password click on the **Edit Password** link.

On the *Edit Password* page enter your existing password and new password and press submit.

Updating your Profile

To update your profile click on the **Edit Profile** link.

On the *Edit Profile* page update the relevant fields and press submit. The following fields are available in your profile:

- Title, this field is mandatory
- First name, this field if mandatory
- Last name, this field is mandatory
- Occupation, this field is optional.
- Country, this field is optional.
- Language, this field is optional.

Managing your Keys
To manage your keys click on the **Your Keys** link from the *User Control Panel* side menu.

The *Keys* page displays the list of keys *you* have uploaded in a table, including the key title, the date last updated, and the key status.

Adding Keys

To add a new key click on the **Add Key** link.

The *Add Key* page allows you to upload new keys to the key server.

The *Add Key* page allows you to set the following metadata for the key:

- Key title, this field is mandatory.
- Key description, this field is mandatory and should be a verbose description of the Key. (**Note:** this field may contain HTML formatting)
- Key authors, this field is optional.
- Key publisher, this field is optional.
- Key version, this field is optional.

You can also specify an icon or image file for the key. The icon is displayed next to the key description in the key listing and search pages. The icon file type should be *JPEG*, *GIF* or *PNG*.

There is also an option to specify the type of key you are adding. The Lucid Key Server supports two types of keys:

- Local keys are stored locally in the Key Server database and served using the Lucid Online Player.
- Remote keys are links to keys stored on a remote or external server, such as an applet key hosted on an organisations website.

When adding a local key you need to specify the key dataset file and the format of the dataset file that you are uploading (currently either a Lucid Dataset or SDD 1.1 Dataset). Both types of dataset files can be exported from Lucid v3.4 or greater. See *Exporting Key Data from the Lucid3.*

When adding a remote key you need to specify the URL or web address of the remote key.

Editing Keys

To edit the metadata for a key click on the title of the key that you wish to edit.

The *Edit Key* page allows you to update the metadata describing the key, this includes:

- Key title.
- Key description, this field can be verbose and contain HTML formatting.
- Key authors, this field is optional.
- Key publisher, this field is optional.
- Key version, this field is optional.
- Key icon, an image which is displayed inline with the key description on the keys page and in search results, this field is optional.

The *Edit Key* page also allows you to specify group based access control and the status (enable/disable) of the key.

User groups - this section allows you to specify the user groups that have access to the key. Selecting the 'guests' group allows open or public access to the key. Selecting the 'registered' group restricts access to registered users. Other user groups may be available for selection depending on what user groups have been created by the Key Server administrator. Multiple groups may be selected, in this case access to the key is granted to users belonging to any one of the selected groups. If no groups are selected guest or public access is granted to the key by default.

Status, this option allows you to enable (tick) or disable (no tick) access to the key. When a key is disabled access to the key is restricted, the key is also not displayed on the keys page or in search results.

The *Edit Key* page also allows you to delete the key by clicking on the ***Delete*** button.

> *Note: Deleting a key will result in all records for the key being removed from the database, and all files associated with the key being removed from the server, such as icon files and media files associated with the key. There is no undo to this action.*

Editing Key Data

To edit or update the dataset for a key click on the *Edit Key Data* link next to the key you wish to update. (**Note:** This option is only available for local keys)

The *Edit Key* page also allows you to update the dataset for a key.

To update the key dataset select your most recent key dataset file and specify the type of dataset file you are uploading (Lucid Data set or SDD 1.1 format).

> *Note: After updating the key dataset you may need to update or re-upload the key's media files if the media content or media references have changed.*

Editing Key Options

To edit or update the runtime options for a key click on the ***Edit Options*** link next to the key you wish to update. (**Note:** this option is only available for local keys)

The *Edit Key Options* page allows you to specify the runtime options for a key.

These options include:

- **Matching Options** - Allow Misinterpretations and Retain Uncertains. (Please see the Lucid Online Player help for more details on these functions)
- **Matching Mode** - Any State or All States. (Please see the Lucid Online Player help for more details on these functions)
- **Start Path** - The start path allows an alternative start page to be specified for the.

> *Note: The start path can be relative to the keys media folder, e.g. Html/start_page.html, or a full url, e.g. http://www.myserver.com/keys/mykey/start.html. If specifying an alternative start page you should include a link to the Online Player to run the key, this link is displayed on the Edit Key Options page.*

Uploading Key Media

To upload media files for a key click on the ***Upload Media*** link next to the key you wish to update. (**Note:** this option is only available for local keys)

The *Upload Media* page allows you to upload the Media files that are contained within or referenced by your key. This page uses a Java applet for the upload process, refer to the *System Requirements* section for information regarding running java applets.

The Media Upload applet is a 3 step process:

Step 1: Browse for and select the media folder of the key on your local filesystem (See - **Formatting keys to be deployed in the Online Player)**. For Lucid keys this folder will be within the key's data folder. Press 'Next' once selected.

Step 2: The Media Upload applet will display a list of files associated with the key, and any additional media files located within the media folder or subfolder thereof. At this point you may unselect files that you do not wish to upload. Press 'Next' to continue.

Step 3: The applet is now ready to upload your media files. Press the 'Start' button to begin the upload process. The upload process will post files to the server in the order shown in the previous step. As each file is posted the result will be shown and the progress bar incremented. You can pause or stop the upload process at any time.

Once the message "Upload finished" appears, you can then view your key and media by clicking on ***Home*** and then clicking on the keys title.

Help for Key Server Administrators
Managing the Lucid Key Server

The Admin Control Panel

The *Admin Control Panel* provides the Key Server administrator with tools to create and edit users, create and manage user groups and manage user contributed keys.

The *Admin Control Panel* is accessed by logging in with an account with administrator rights and clicking on the **Admin** link in the main menu bar.

> *Note: The default administrator account is "admin", with the default password "keyserver". It is recommended that you change this password after installing the Key Server.*

> *Note: Users may be granted administrator rights by assigning the admin role to the user from the user manager.*

The *Admin Control Panel* consists of four sections, Server Preferences, Users, User Groups, and Keys, which are accessed using the menu on the left of the screen.

Customising the Lucid Key Server

Key Server Preferences

To edit the Key Server preferences click on the ***Edit Preferences*** link in the Admin menu.

The *Edit Preferences* page allows you to set various options for the Lucid Key Server, these options are:

Email From Address – string (email) - the address that email notifications from the Key Server are sent from.

Email From Name – string - the name that email notifications from the Key Server are sent with.

Registrations Enabled – true or false (ticked or unticked) – when true users are able to register for an account on the Key Server. When false, the registration link is disabled and hidden and users are not able to register themselves.

Keys per Page – integer - controls the number of keys shown per page on the key listing or search pages.

Language Resources

The language strings of the Key Server can be customised either for another language or to preferences of the organisation. For more information on customising the Key Server language please refer to the installation documentation.

Managing Users

The Users section of the *Admin Control Panel* allows administrators to manage users registered on the Key Server.

The registered users are displayed in a table, showing the email, name, register and last log in date, roles and user groups of each user.

Editing a User

To edit a user click on the **Email** address link of the listed user you want to edit.

The *Edit User* page allows administrators to edit existing users.

- Title
- First name
- Last name
- Email address
- Password, this field is optional, when specified the users password will be changed to the input value.
- Occupation, this field is optional.
- Country, this field is optional.
- Language, this field is optional.
- User groups, the groups that the user belongs to, membership to the registered group is default and cannot be changed.
- Status, if unchecked the user is disabled and cannot login.
- Roles, the roles that the user is granted, admin, pending and suspended.

User Roles

The following role based permissions can be applied to users via the *User Manager*.

- **Admin**, denotes that the user has admin rights and access to the *Admin Control Panel*. Admin users also have access to any key posted to the Key Server, over-riding user group based permissions.
- **Pending**, denotes that the user has not yet confirmed their email address. Pending users cannot upload new keys to the Key Server.
- **Suspended**, denoted that the user is suspended; this role is applied when a user account is disabled.

Managing User Groups

The *User Groups* section of the *Admin Control Panel* allows administrators to create and manage user groups. User groups are used within the Key Server for access control purposes.

The available user groups are displayed in a table, showing the Name and Description of each user group. There are two default system groups, '**GUESTS**' and '**REGISTERED**'. Registered users belong to the 'registered' group. Visitors or anonymous users belong to the 'guests' group.

The 'Members' link next to each group displays a list of all users present in the selected user group.

The 'Delete' link next to each group removes the selected user group. Any users or keys that are assigned to the user group are removed from the user group.

User groups can be edited by clicking on the group's name. Additional user groups can be created using the *Add User Group* link.

> *Note: System groups cannot be edited or removed.*

Users can be assigned to user groups, please refer to the *Managing Users* section for more details.

Keys can also be assigned to user groups, please refer to the *Managing Your Keys* and *Managing Keys* sections for more details.

Managing Keys
The *Manage Keys* section of the *Admin Control Panel* allows administrators to manage the keys stored by the Key Server.

The list of available keys are displayed in a table, showing the Title, Last Update Date, Status and Owner of each key.

Clicking on the title of a key will open the *Edit Key* page. The functionality of this page is the same as the *Edit Key* page available from the *User Control Panel*. Which includes; editing the key metadata, managing the key access control and status, and deleting the key.

Exporting Key Data from Lucid3 for the Lucid Key Server
To upload keys to the Lucid Key Server you first need to export the key dataset from the Lucid3 Builder. The Lucid Key Server supports the Lucid Dataset or SDD 1.1 Dataset formats, key datasets in either format can be created using the *Export Key* functionality of the Lucid3 Builder.

> *Note: To ensure your key data is exported in the latest dataset format ensure you are using the most recent version of the Lucid3 Builder – currently 3.4.1*

Follow the steps below to export your key dataset:

1) Open the key you wish to export in the Lucid3 Builder.
2) From the *File* menu, select the *Export Key* option.
3) In the Export Key dialog enter the filename of the dataset file to be created. Typically you will use an .xml file extension for files of Lucid Dataset of SDD 1.1 Dataset format.
4) In the File Type combo box on the Export Key dialog select either the Lucid Dataset or SDD 1.1 Dataset option.
5) Click on the OK button.

The Export Key progress dialog will be displayed and the currently opened key will be exported to the selected file in the format selected.

The dataset file created using this process can then be Imported into the Lucid Key Server. Refer to the Section: **Adding Keys** for more information on this process.