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Installation and configuration of the Ubuntu 24.04 operating system for IMS servers

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NOTE: All sections marked with * can be skipped when installing on a virtual server

1 Introduction

The purpose of this document is to document the procedure for installing and configuring the operating system of IMS Servers. For the recommended server specifications, please refer to the following document:

<https://software.imseismology.org/documents/IMS-Server-Specification.pdf>

For general IT requirements needed by the seismic system, please refer to the following document:

https://software.imseismology.org/documents/IT/IMS_IT_requirements.pdf

If the operating system is not being installed by IMS, this guide should be completed to the end of Section 6: [Update Ubuntu](#), at which point IMS will complete the system configuration.

2 Preparation

2.1 Create Ubuntu Boot Media

The version of Ubuntu to be installed is:

- Latest Ubuntu Server 24.04.x LTS (64-bit)
 - 64 bit version (for 64 bit hardware)
 - Ubuntu Server edition does not support 32bit architecture

The boot media can be created using a USB disk or CD:

Download the correct ISO image from one of the following sites:

- <https://software.imseismology.org/os/ubuntu-24.04.x-live-server-amd64.iso>
- <https://www.ubuntu.com/download/server>

Create the bootable USB or CD image from the downloaded ISO image file.

Option 1: Create boot disk from Linux

The recommended method within a Linux OS is to image a USB flash drive using the **dd** command (images created with Ubuntu startup disk creator are known to have some issues) (root privileges required).

```
sudo dd if=<iso_file.iso> of=/dev/<device>
```

Example:

```
$ sudo dd if=ubuntu-24.04.1-server-amd64.iso of=/dev/sdd
```

Note: Ensure that you specify the correct drive as depending on the PC it may be /dev/sdb or /dev/sdc

Option 2: Create boot disk from Windows

Example USB boot drive creation software is Rufus that can be downloaded from <https://rufus.ie/en/>

2.2 Network Details

As part of the server configuration process, the operating system and software packages will be updated to their most recent versions by downloading updates from the Internet. You will therefore need to connect the server to the Internet and have the network configuration details available before proceeding.

- Dynamic network configuration via DHCP:
 - Host name
 - Proxy settings if applicable (IP, port, authentication details, etc.)

or

- Static network configuration:
 - hostname
 - IP address and netmask
 - DNS IP address
 - DNS domain
 - Gateway IP address
 - Proxy settings if applicable (IP, port, authentication details, etc.)

3 Hardware Configuration *

3.1 Set PC BIOS (non-virtual)

- Boot PC
- Enter BIOS
- Set boot sequence to CD or USB first
- Set **Hardware Clock** to **UTC (GMT)** - this can be more accurately set in section 7.11.
- Set **AC Recovery** to **on**
- Ensure that if the PC has an on-board serial port, this is set to **COM1**
- If the system supports **UEFI**, turn it **on**
- Disable **Secure Boot** (if option available) - If enabled it may cause the MOXA driver installation to fail.
- Disable the **Windows Boot Manager** (if option available)

3.2 RAID

If the system is planned for a RAID configuration

- Boot PC
- Enter Boot Menu
- Select Device Configuration

Only configure RAID if the PC has a dedicated **hardware** RAID controller. Do **NOT** configure software raid. During virtual disk configuration, the virtual disk should be initialised.

- For a configuration with 2 physical hard drives, create 1 virtual disk using RAID 1
- For a configuration with 4 physical hard drives, create 2 virtual disks using RAID 1 (in special cases, RAID5 can be used)

4 Install Ubuntu

Ubuntu Server does not assume that the machine has a graphical interface (i.e. may be installed via a terminal), all the installers user interaction is via keyboard interactive text based menus. Control keys are usually documented on the bottom of screen; usually <TAB> moves between fields, <SPACE> selects and <ENTER> activates fields.

4.1 Boot from Ubuntu Boot Media

- With the boot media (created in step 2.1) inserted into the machine, boot from the the device (you may need to enter the BIOS boot menu to select the correct boot device).
- Select your language and then from the boot menu select “Install Ubuntu Server”.

4.2 Select Locale Settings

- language (English)
- location (**not** the end user/customer’s timezone, but the local one where the machine is being setup - this is important because Ubuntu uses this setting to select the best software package repository servers to use based on region)
- keyboard (follow the interactive menus to detect your keyboard)

4.3 Configure the Network

When prompted, configure the network details of the server. If not know, leave as automatic and configure at a later stage.

Refer to section 5.

4.4 Proxy Settings

When prompted to enter HTTP proxy information, enter the required details or leave blank and continue with the installation if proxy server is not used.

4.5 Ubuntu Archive Mirror

Leave default URL except change protocol from http to https.

4.6 Disk Partitioning

The following subsections show specific partition details for both physical servers and virtual servers. Please be sure to follow the partitioning applicable to the machine type and disk setup being used. Unless specifically required, do not use the LVM disk option. If a mix of SSD and spinner storage is available, partition the OS and some data on the SSD section if possible.

4.6.1 Physical Machine Partitioning

- select **manual** partitioning
- follow the interactive menus to partition the disks as follows:
 - for a multi-disk system (with or without raid) put /data and /home on a second or third disk
 - delete all existing partitions if the PC has a pre-installed OS
 - if this is an upgrade preserve /data and /home
 - for systems supporting UEFI (recommended), the first partition should be an EFI boot partition of 2 GB
 - for systems NOT supporting UEFI, the first partition should be 2GB mounted to /boot
 - if the disk sizes are below 1TB, the size of the /home partition might need to be adjusted to ensure the /data partition is large enough for long-term data storage
 - create partitions according to the following table (example partition sizes based on a minimum disk size of 1TB):

Note: Correct disk partition sizes are critical to the long-term stability of the system, please contact IMS Support if unsure of what partition sizes to use.

**NOTE: Only use one boot option depending on the BIOS configuration.
(EFI boot OR BIOS boot)**

Description	Disk		Mount-point	Type	Primary/ Logical	Size
	2 HDDs	1 HDD				
EFI boot <u>or</u> BIOS boot	1	1	/boot	EFI boot ext4	Primary	2GB
Root partition	1	1	/	ext4	Primary	100GB
Swap space	1	1	-	swap	Logical	2 x RAM (max 32GB)
IMS spare data area	1	n/a	/data1	ext4	Logical	rest of drive
Home directory	2	1	/home	ext4	Primary	250GB
IMS data area	2	1	/data	ext4	Logical	rest of drive

Table 1: Minimum partition sizes for a 1 or 2 disk system.

4.6.2 Virtual Machine Partitioning

- select **manual** partitioning
- follow the interactive menus to partition the disks as follows:
 - if this is an upgrade preserve /data and /home
 - for systems supporting UEFI (recommended), the first partition should be an EFI boot partition of 2 GB
 - for systems NOT supporting UEFI, the first partition should be 2GB mounted to /boot
 - create partitions according to the following table (example partition sizes based on a minimum disk size of 400GB for disk 1 and 1TB for disk 2)
 - best practice is separate virtual disks for OS/home and data drive. **Data drive should be setup as GPT type if less than 2TB initially.**

**NOTE: Only use one boot option depending on the BIOS configuration.
(EFI boot OR BIOS boot)**

Description	Disk	Mount-point	Type	Primary/Logical	Size
EFI boot	1		EFI boot	Primary	2GB
BIOS boot		/boot	ext4		
Root partition	1	/	ext4	Primary	100GB
Swap space	1	-	swap	Logical	2 x RAM (max 32GB)
Home directory	1	/home	ext4	Primary	rest of drive
IMS data area	2	/data	ext4	Logical	entire drive

Table 2: Minimum partition sizes for 2 virtual disk system.

Note: Correct disk partition sizes are critical to the long-term stability of the system, please contact IMS Support if unsure of what partition sizes to use.

- When inquired, install GRUB boot loader on same drive as operating system.

4.7 Create User Account

4.7.1 First account

The first account created must be the “ims” account. After this, other accounts can be created if required.

- Full name of user: IMS
- Hostname (server name): <name as required>
- username: ims
- password: <db>1m\$<netID>
 - You may be prompted with a message telling you that the password chosen is too weak, select **Yes** to bypass the prompt and continue using the entered password.
- encrypt /home partition: No

Please refer to the additional accounts section if there is a requirement to add more accounts.

4.8 SSH Setup

- Install the SSH server
(Use the arrow keys and press **spacebar** to select **OpenSSH Server** and then **enter** to continue with the installation.)
- Do not import ssh identity files.

4.9 Featured Server Snaps

Unless required, do not install additional packages.

4.10 Install 3rd Party Drives

When prompted, install third party drives.

4.11 Additional Software Selection

When prompted to select additional software packages for installation, select the **OpenSSH Server** package leave the rest unselected.

5 Network Settings

After Ubuntu installation, edit the `/etc/netplan/50-netcfg.yaml` file (or yaml config available) and configure the network settings for all network interfaces. Use the example network interfaces file as a starting point, available from:

<https://software.imseismology.org/documents/System/01-netcfg.yaml>

Note: The functional lines in this file **MUST** be indented as per the template otherwise the network interfaces will not function.

After updating or replacing the file, run the following commands to test and then apply the new settings.

Test that the new config is valid:

```
sudo netplan generate
```

If no errors, apply the new config file.

```
sudo netplan apply
```

6 Update Ubuntu

Update the Ubuntu installation:

```
sudo apt-get update
sudo apt-get dist-upgrade
```

7 Server Preparation

7.1 Create Root Password

Normally Ubuntu does not have a login for root - all access is via the `sudo` command using the `ims` password. For some cases a root login is useful. The following commands will create the root login:

```
sudo passwd
```

- enter the `ims` root password when prompted
- enter the technical services root password (twice) when prompted

Please note that SSH access on the root account is disabled by IMS setup scripts as a security precaution.

7.2 Additional Packages Required by IMS

7.2.1 Ubuntu Extras (compulsory)

A number of additional packages are required by the IMS system. A script named `ubuntu_extras.sh` is available to install these packages; the latest version of the script can be downloaded from:

https://software.imseismology.org/os/ubuntu_extras_2404.sh

Run the script as the “ims” user, it will determine the package dependencies and install them.

```
chmod +x ubuntu_extras_2404.sh
./ubuntu_extras_2404.sh
```

Follow the interactive menus, answering Yes if asked to install additional packages.

The postfix installation will ask for some information:

- select **OK**
- select **local only**
- system mail name - leave as default **<hostname>**

After the script has completed, a log file will be written to disk (in the same directory from which the script was run) which summaries the packages installed. Check that all packages were installed correctly and if required, try install again if one failed.

7.2.2 Ubuntu Extras - GUI add-on (disable by default for ALL servers)

To install the Ubuntu GUI packages, run the script named `ubuntu_extras_2404_gui_addon.sh` which is available for download from:

https://software.imseismology.org/os/ubuntu_extras_2404_gui_addon.sh

- Run the script:

```
chmod +x ubuntu_extras_2404_gui_addon.sh
./ubuntu_extras_2404_gui_addon.sh
```

- After the script has completed, a log file will be written to disk which summaries the packages installed. Check that all packages were installed correctly. It is recommended that this log file gets copied to the directory: `/home/ims/Documents/InstallationRecords`

- Reboot the system and then proceed to install the required graphics drivers (if applicable)
 - In the “Software and Updates” menu, select “Additional Drivers”; the appropriate graphics drivers should be automatically detected. Apply the changes and restart the system.
 - * Note: If no recommended drivers are displayed in this menu, download and install from the manufacturers web page.
- If a server with graphics is shipped by IMS, the graphical interface is generally disabled with the following command:

```
systemctl set-default multi-user.target
```

- If the GUI must be re-enabled at any point due to customer specific requirements, use the following command:

```
systemctl set-default graphical.target
```

7.2.3 3D drivers (Desktop PC Seismic server only)

If the GUI is to be enabled on a desktop seismic server the 3D drivers should be installed following the enabling of the GUI. This can be done using the following steps.

1. When logged into Ubuntu using the GUI, select “Activities” from the top left of the screen
2. In the search field type “software & updates” and select the application
3. From the top tabs select “Additional Drivers”
4. Wait for the list to be populated with the available drivers
5. Select and apply the latest “(open source)” driver

7.2.4 Enable Automatic Security Updates (compulsory)

After all additional packages have been installed, disable automatic installation of updates. This should only be completed **after** all updates and packages have been installed.

From the command line as root (sudo), edit the file `/etc/apt/apt.conf.d/50unattended-upgrades`

Find and uncomment and change the following lines:

- `Unattended-Upgrade::Remove-Unused-Dependencies "true";`
- `Unattended-Upgrade::Automatic-Reboot "false";`

From the command line as root (sudo), create/edit the file

`sudo vim /etc/apt/apt.conf.d/20auto-upgrades` and ensure the contents are the same as the below:

```
APT::Periodic::Update-Package-Lists "1"; APT::Periodic::Unattended-Upgrade "1";
```

To test unattended-upgrades manually:

```
sudo unattended-upgrade -v
```

7.3 DELL Hardware RAID utility, storcli for PERC (if available) *

If the disk controller is a Dell PERC H series hardware RAID controller, then install the storcli utility to enable monitoring or changing the disk status.

A version of the package for Ubuntu 24.04 is available at URL:

https://software.imseismology.org/os/storcli_007.3205.0000.0000_all.deb

Install with `sudo dpkg -i storcli*.deb`, there should be no problems with dependencies.

After installation, add storcli to user bin:

```
sudo ln -s /opt/MegaRAID/storcli/storcli64 /usr/local/bin/storcli
```

To find the device ID's of the installed disks and check their status, run

```
sudo storcli /call/eall/sall show all
```

By changing the sall to s(number) will show the info for selected drive:

```
sudo storcli /call/eall/s0 show all
```

7.4 Configure smart monitoring tools *

7.4.1 For RAID system

The `smartmontools` package should have been installed in step 7.2 above and running `megacli` creates the device file `/dev/megaraid_sas_ioctl_node` which the smart utilities use. Perform the following steps to check that the error counts for all disks are 0.

Run the following command to list the megaraid IDs, and their corresponding SCSI device.

```
sudo smartctl --scan
```

Note: The output should look similar to the following (megaraid ID in Underline, SCSI device in **Bold**)

```
/dev/sda -d scsi # /dev/sda, SCSI device
/dev/bus/0 -d megaraid,8 # /dev/bus/0 [megaraid_disk_09], SCSI device
/dev/bus/0 -d megaraid,9 # /dev/bus/0 [megaraid_disk_09], SCSI device
```

Run the following command to check for error counts.

```
sudo smartctl -a -d megaraid,<megaraid ID> <SCSI device>
```

The above command should list the S.M.A.R.T. info for the specified disk. Repeat for all disk IDs listed by `smartctl -scan`.

To enable continuous monitoring by `smartd`, add a line like the example below to `/etc/smartd.conf` for each disk.

```
<SCSI device> -d megaraid,<megaraid ID> -a
```

Ensure that `smartd` will be started at boot by uncommenting or adding the following line in: `/etc/default/smartmontools` (edit as root).

```
start_smartd=yes
```

Also, to ensure that the `smartd` messages are reported by `logwatch`.

Create a file `/etc/logwatch/conf/services/smartd.conf` with the following line.

```
LogFile = syslog
```

Add an entry to root's cron to run the above `megacli` command once a day.

```
su (enter ts root password)
crontab -e
```

At the bottom of the the cron table enter the following.

```
3 3 * * * /usr/sbin/megacli -PDList -aAll >/dev/null 2<&1
```

Optionally, divert root's mail to someone who would like to receive disk error notificaitons, by setting an alias in `/etc/aliases`, and running the command `newaliases`.

7.4.2 For non-RAID system

The `smartmontools` package should have been installed in step 7.2 above. Perform the following steps to check that the error counts for all disks are 0.

Run the following command to list the SCSI devices.

```
sudo smartctl --scan
```

Note: The output should look similar to the following (SCSI device in **Bold**)

```
/dev/sda -d scsi # /dev/sda, SCSI device
```

Run the following command to check for error counts.

```
sudo smartctl -a <SCSI device>
```

The above command should list the S.M.A.R.T. info for the specified disk. Repeat for all disks listed by `smartctl -scan`.

To enable continuous monitoring by `smartd`, add a line like the example below to `/etc/smartd.conf` for each disk.

```
<SCSI device> -a
```

Ensure that `smartd` will be started at boot by uncommenting or adding the following line in:
`/etc/default/smartmontools` (edit as root).

```
start_smartd=yes
```

Also, to ensure that the `smartd` messages are reported by `logwatch`.

Create a file `/etc/logwatch/conf/services/smartd.conf` with the following line.

```
LogFile = syslog
```

7.5 Grub Configuration

(The following should have been executed in the ubuntu extras script, but please verify.)

- Edit the following file (root privileges required):

```
/etc/default/grub
```

- Add the following lines at the end of the file:

```
# If this option is set, it overrides the default
# recordfail setting. The default setting is -1,
# which causes GRUB to wait for user input.
# This option should be set on headless and appliance
# systems where access to a console is restricted
# or limited.
GRUB_RECORDFAIL_TIMEOUT=30
```

- Run the command (root privileges required):

```
update-grub
```

7.6 Remove IMS database from locate DB

(The following should have been executed in the ubuntu extras script, but please verify for additional data drives)

The locate database must not be left to run on the IMS database partitions

- Edit the following file (root privileges required)

```
/etc/updatedb.conf
```

- make sure that the following partitions are added to the PRUNEPATHS entry

```
/data/ims
```

7.7 Serial Port UDEV Rules

(The following should have been executed in the ubuntu extras script, but please verify.)

Usually serial ports appear in the `/dev` directory which is owned by `root` user, and `dialout` group. The `ims` user should have been added to the `dialout` group as part of the `ubuntu extras` script.

If not, run the following:

```
sudo adduser ims dialout
```

The following UDEV rules should be added. Examples can be found at:

http://software.imseismology.org/documents/System/udev_rules/

7.7.1 USB port *

- Create or edit the following file (root permissions required):

```
/etc/udev/rules.d/ttyUSB.rules
```

- Contents of the file should be:

```
# rules for USB ports: change ownership to ims:dialout
SUBSYSTEM=="tty", KERNEL=="ttyUSB*", OWNER="ims", GROUP="dialout"
```

7.7.2 Standard serial ports *

- Create or edit the following file (root permissions required):

```
/etc/udev/rules.d/ttyS.rules
```

- The contents of the file should be:

```
# rules for standard serial ports: change ownership to ims:dialout
SUBSYSTEM=="tty", KERNEL=="ttyS*", OWNER="ims", GROUP="dialout"
# uncomment the next line for NTP with GPS NMEA messaging on ttyS0
#SUBSYSTEM=="tty", KERNEL=="ttyS0", SYMLINK+="gps0", RUN+="stty -F /dev/gps0 9600"
```

7.7.3 Moxa terminal servers (N-ports)

- Create or edit the following file (root permissions required):

```
/etc/udev/rules.d/ttyr.rules
```

- The contents of the file should be:

```
# rules for moxa serial ports: change ownership to ims:dialout
SUBSYSTEM=="tty", KERNEL=="ttyr*", OWNER="ims", GROUP="dialout"
# uncomment the line below for NTP with GPS on ttyr00
# note that ttyr00 and ttyr0 are the same port,
# the moxa driver creates both and both are linked
# to kernel ttyr0
#SUBSYSTEM=="tty", KERNEL=="ttyr0", SYMLINK+="gps0", RUN+="stty -F /dev/gps0 9600"
```

NB Caveat

Please note that the Moxa driver installer changes the permissions on the /tmp directory. This may cause the X-server to fail after the PC is rebooted and cause the IMS software packages to misbehave. After driver installation, change the permissions on /tmp.

```
sudo chmod -R 777 /tmp
```

7.8 Change ssh settings

(The following should have been executed in the ubuntu extras script, but please verify.)

Edit the file /etc/ssh/sshd_config as root (sudo) and make sure the following are set correctly

```
PermitRootLogin no
UseDNS no
```

Edit or create the file ~/.ssh/config (as ims user, not root or sudo)

```
mkdir /home/ims/.ssh
vi /home/ims/.ssh/config
```

Add the following contents to the file

```
Host *
  HostKeyAlgorithms +ssh-dss,ssh-rsa
  PubkeyAcceptedKeyTypes +ssh-rsa
```

7.9 Time Synchronisation (chrony)

(The following should have been executed in the ubuntu extras script, but please verify.)

The Synapse server should synchronise to external time servers and will act as the time server for IMS devices in the field.

Unless an IMS supplied GPS unit with NTP capabilities was supplied, access to a local or public NTP server is required.

If a local NTP server source (supplied by the local IT team) is unavailable, a list of Internet NTP servers is provided and maintained by the POOL.NTP.ORG project. Time servers that are relatively close to the network location should be used; so if possible use servers that are specific to the country, or else servers in nearby countries, or servers in the appropriate world region. See pool.ntp.org for servers in the appropriate pool. Note that using Internet server's assumes that the port used by NTP (123) is allowed past the firewall etc.

7.9.1 Chrony configuration file

- The chrony configuration file should always contain an entry for the local clock (local stratum 10) so that the seismic the server can act as a time source to clients devices (IMS devices).
- The time service should also allow any device to connect and slave to it. Add a line “allow 0.0.0.0/0”
- **Never** have only 2 servers defined (not including the local clock) - 1 is better, 3+ are recommended.
- As root, edit /etc/chrony/chrony.conf, commenting out all servers defined by default in Ubuntu, and add entries for the local clock, local ntp servers, and GPS if available.
- Example sections of the `chrony.conf` file defining the servers (with comments) is available at the following URL.
<http://software.imseismology.org/documents/System/example-chrony.conf>
- Restart chrony:

```
sudo systemctl restart chronyd
```

- Check Chrony status:

```
sudo chronyc sources
sudo chronyc ntpdata
```

7.9.2 Synchronising to GPS

Where time synchronisation is via a GPS, the GPS's NMEA port should be connected to a serial port on the server, with the PPS signal on the DCD line of the serial port. Make the correct symbolic link (/dev/gps0) to the serial port at boot time - refer to section 7.7.2.

The connection to the GPS information and done via gpsd and chronyd configured to connect to gpsd.

AppArmor chronyd profile By default Ubuntu will have an AppArmor profile enabled which restricts chronyd's access to the serial port. As a result chronyd will not be able to access the GPS NMEA messages via the serial port. The symptoms of this are that the GPS clock (refid: .GPS.) will not be visible in the output. There should also be a message in the system logs (/var/log/syslog and/or /var/log/messages) with fields such as: apparmor="DENIED", profile="/usr/sbin/chronyd" and name="/dev/ttyS0".

To disable this behaviour, put AppArmor's ntpd profile into complain mode, which will log attempts by ntpd to open the serial port, but will not disallow it. An AppArmor profile can be put into complain mode by using the aa-complain command. aa-complain should have been installed by the Ubuntu extras script, but if it is not installed on the machine, you can do so by typing the following:

```
sudo apt-get install apparmor-utils
```

To put the chronyd program into complain mode, run the following command:

```
sudo aa-complain /usr/sbin/chronyd
sudo aa-complain /usr/sbin/gpsd
```

7.10 Timezone

The timezone of the PC should be set to the correct location. This can be done from the command-line:

```
sudo dpkg-reconfigure tzdata
```

Follow the directions to select the correct timezone.

If the Ubuntu GUI is available, the following can be performed:

1. Open the **System Settings** (available on the power icon in the top right corner of the screen).
2. Open the **Time & Date** application.
3. Use the **Time & Date** panel to set the location and timezone.

7.11 Hardware Clock

It is important that the hardware clock (a.k.a. BIOS clock, RTC, etc.) is kept up to date and synchronised to UTC, so that after a reboot or power cycle the server starts up with reasonably accurate time (accurate enough for NTP to slave the local clock to external time servers, i.e. within a few seconds/couple of minutes of UTC). This is handled automatically by the operating system and NTP, but it is possible that the hardware clock can drift far out of sync (e.g. due to the BIOS battery running flat or other software changing the hardware clock to localtime).

For this reason the Synapse Server software will periodically check the hardware clock, and raise an issue if the hardware clock time is out of sync with UTC.

The system needs to be told to set the hardware clock to UTC time. The following command will achieve this.

```
sudo timedatectl set-local-rtc 0
```

Check that it was correctly configured by typing the following.

```
timedatectl
```

Output should read “RTC in local TZ: no”

Once the time on the PC is correct - preferably set through NTP, the following can be performed to set the hardware clock based on the current system time:

```
sudo hwclock --systohc --utc
```

Double-check that the time was set correctly by printing out the system time and hardware clock (they should be roughly the same):

```
date; sudo hwclock --utc
```

7.12 SAMBA

Only setup and enable SAMBA shares if required.

Please note that the Ubuntu extras script disables the Samba service (smbd) from starting up. To enable to service to automatically start, enable it as follows:

```
sudo systemctl enable smbd
sudo systemctl restart smbd
```

Setting up SAMBA shares:

Samba can be set up either graphically or from the command line.

From a Graphical Login:

- On the server, open Nautilus file browser:
 - Places > Home
- Create the directory you wish to share if necessary
- Right click on the folder and select “**properties**”
 - Navigate to local network share window
 - Check the **Share this folder** checkbox (e.g. /data/ims)
 - Add a share name and comment (e.g. "ims_data" and "IMS databases share")
 - Check the **Allow others to create and delete files** option ONLY IF NECESSARY
 - Ensure **Guest access** checkbox is left UN-CHECKED
 - Click **Create share**
 - * Click on the **Add permissions automatically** if prompted to do so

From the Command-Line:

- Open a terminal
- Type the following command: (Note: the /data/ims directory gets created by the IMS setup software package)

```
net usershare add ims_data /data/ims/ "IMS databases share" ims:F guest_ok=n
```

- If this command fails with an error about you not having permissions to create a usershare, then you should add the ims user to the "sambashare" group as follows:

```
sudo adduser ims sambashare
```

- Logout and login again for the new group membership changes to take affect: you can check what groups the user belongs to by typing :

```
groups
```

- Once you have added the ims user to the sambashare group, run the above "net usershare..." command again
- This adds a share called "ims_data" with description/comment "IMS databases share", which shares the /data/ims directory with full permissions for the ims user, guest access is not allowed
- To check the created usershare, type:

```
net usershare info --long
```

- You should see the following output:

```
[ims_data]
path=/data/ims/
comment=IMS databases share
usershare_acl=TSTIMS1\ims:F,
guest_ok=n
```

Final Steps:

- Create a SAMBA password for the ims user (if not already done):

```
sudo smbpasswd -a ims
```

- (use the same password as the system ims user)

- Ensure ims user is enabled in local smbpasswd file:

```
sudo smbpasswd -e ims
sudo service smbd restart
```

- On Windows client:
 - Browse to the share by entering `\\hostname\share_name` in Windows explorer file browser
 - Map network drive as usual

7.13 Create hardware summary of system

A unified summary of the system hardware is useful for future technical support, and should be saved to html and xml files using the `lshw` command.

First, create a directory for the Installation Records.

```
mkdir /home/ims/Documents/InstallationRecords
```

Run the following commands to generate the hardware summary files and save them to the desired directory.

```
sudo lshw -html > "/home/ims/Documents/InstallationRecords/${HOSTNAME}_lshw.html"
sudo lshw -xml > "/home/ims/Documents/InstallationRecords/${HOSTNAME}_lshw.xml"
```

This command will create a summary of the system hardware (including the DELL service tag number).

8 Additional accounts

If additional accounts are required, example for local IT support, it is recommended to create separate accounts from the the “ims” for tracking purposes.

From the “ims” user account, create the additional account, example “itsupport” by running the following from a terminal:

```
sudo useradd -s /bin/bash -m itsupport
```

Change the password:

```
sudo passwd itsupport
```

If the user requires sudo (super user) privileges, add them to the sudoers group:

```
sudo usermod -aG sudo itsupport
```

9 Install IMS Software

Install IMS server software packages in the following sequence and follow the prompts for each installer

1. IMS System
2. IMS Services
3. IMS Synapse Server (update to newest Synapse server and Synapse Runtime server after installation if required using available update packages and scripts and make sure the Synapse settings is set to use chrony.conf instead of ntp.conf)
4. IMS Database server (update to newest Database server version after installation using available update packages and scripts)
 - If Synapse server was not install, first install IMS Glassfish 5.

Change Record

Date	Author	Description	Revision	R
Change Control Record				
2025/01/08	RE	Adapted from IMS-SERVER-INSTALL-UBUNTU-22.04-LTS-202209-REv2 Update OS to Ubuntu 24.04 LTS, new setup scripts, replace ntpd with chronyd, GUI lightdm replaces with default gdm, various minor updates, disk partitions	0	
2025/05/14	RE	Minor text updates (chrony services with root)	1	
2026/09/01	RE	Change all URLs to HTTPS, update section 7.3 for RAID utility.	2	

Table 4: Change record