ESP DOCS

How to Install and Configure ESP on Ubuntu

Revision History

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1.14	01 Mar 2019	J. Miller	Updated for ubuntu 18.04 – added iptables information Moved a few items and other minor updates throughout.		

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1 Installation Overview

This document describes the procedure for configuring ESP on an Ubuntu Linux Server.

The versions of software used to prepare these instructions were:

Linux: Ubuntu 18.04 Server Edition (64-bit)

PostgreSQL: 9.6 Apache2: 2.4

ESP: 3.4.9 running in a virtual environment using

Python 2.7 Django 1.8

The Ubuntu server should have ssh, git, and access to a local SMTP service. iptables are normally turned on by default and should be used to enable inbound connections on just the following ports: 80, 22, 8543.

The installation steps are:

- Create the esp user and system prerequisites
- Download the esp project from gitlab
- Run the install system dependencies shell script
- Create the esp database and esp database user
- Create directories and files expected by ESP
- Configure the Apache web server
- · Open inbound ports via iptables if needed
- Configure the application settings and create the UI user

Additional topics for configuration once the system is running:

- Daily Feed
- ESP Commands
- Database Backups
- Daily Status Reports
- Cron job setup
- Basic disease detection setup

This document may be used a guide for installing ESP on other Linux systems, but keep in mind that there are differences between Linux systems, particularly in package management and user creation and permissions.

Unless otherwise specified, all commands are executed from the Linux bash shell prompt. It is assumed the installer has sudo privileges.

2 Create the ESP User and setup prerequisites

As the system administrator, create the esp user.
 note: The ESP installation will use /srv/esp/prod as its root directory
 /srv/esp is the esp user's home directory.

sudo useradd -d /srv/esp/ -m esp ## you will be prompted to enter a password

2. Add the user to the 'sudo' group

```
sudo usermod -aG sudo esp
```

3. Create and populate the file /etc/apt/sources.list.d/pgdg.list for access to postgreSQL repository the 'lsb_release -cs' command is used to get the proper version for the OS (18.04 = bionic)

```
sudo touch /etc/apt/sources.list.d/pgdg.list
```

add a line for the repository: deb http://apt.postgresgl.org/pub/repos/apt bionic-pgdg main

```
sudo sh -c 'echo "deb http://apt.postgresql.org/pub/repos/apt/
`lsb release -cs`-pgdg main" >> /etc/apt/sources.list.d/pgdg.list'
```

add the postgres apt-key

```
sudo wget -q http://www.postgresql.org/media/keys/ACCC4CF8.asc -0 - \mid sudo apt-key add -
```

update and upgrade all the installed pkgs (upgrade will take a while, say yes to all questions)

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

The pkgs below should be installed by an updated install-system-dependencies.sh or they can be installed manually by root.

sudo apt-get install python-virtualenv python-pip python-setuptools python-dev libpq-dev postgresql-client postgresql-9.6 postgresql-server-dev-9.6

3 Download the ESP project and run the esp install

4. Switch to the esp user

```
sudo su - esp
```

5. Execute the bash shell

bash

6. Clone the esp repository in /srv/esp/prod

```
cd /srv/esp
git clone https://gitlab.com/ESP-Project/ESP.git prod
```

7. Checkout the desired branch and give it a "local" branch name. Unless you specifically require an earlier release, use the latest tagged release branch

run git tag to see the latest tagged releases

```
cd /srv/esp/prod
git checkout v3.4.9 -b v3.4.9-LocalName
```

8. Setup ESP Dependencies by installing the packages that ESP depends on

```
sudo ./install-system-dependencies.sh
    # manual update is needed to add 18.04 for ver 3.4.9 and earlier
sudo chown esp.esp /srv/esp/.cache
```

If errors are encountered, manually edit the file and make modifications to the versions as required. (For non-Ubuntu Linux systems, inspect this script to determine what dependencies to install manually).

9. Install ESP

./install.sh

4 Create the ESP Database and ESP Database User

1. As the system administrator, create an "esp" role in the PostgreSQL database by entering the following at the command prompt:

```
sudo -u postgres createuser -P -s esp
```

first enter your password (for sudo if required)

then in response to the "Enter password for new role" and "Enter it again" prompts enter the password for the new esp user.

The options passed into the createuser command control the following:

- **-P**: assign a password to the new role (you should be prompted)
- -s: role will be superuser

NOTE: If the postgres database will contain databases other than those managed by ESP, you may choose for security reasons to not provide superuser. Some distributed ESP SQL reports that use the COPY command will not work.

Create an "esp" database by entering the following at the command prompt:

```
sudo -u postgres createdb -O esp esp ## Capital O ##
```

The options passed into the createdb command control the following:

-O esp: database user to own the new database

5 Create the Directories and Files Expected by ESP

1. As the ESP user, create the directories and files expected by ESP by entering:

```
mkdir -p /srv/esp/data/ {case_reports,epic,load_reports}
mkdir -p /srv/esp/data/epic/ {archive,incoming,error}
mkdir -p /srv/esp/data/fake
mkdir -p /srv/esp/scripts
mkdir -p /srv/esp/logs
```

Use of the folder name "epic" for inbound data is vestigial.

These folders are used for text data from any source.

2. Create the ESP Log File

```
sudo touch /var/log/esp.log
sudo chown esp:esp /var/log/esp.log
sudo chmod 666 /var/log/esp.log
```

6 Configure the Apache web server

Set up the Apache web server following the steps specified below. These steps should be executed from an interactive shell that is running as root. These steps are specific to Ubuntu Linux distributions.

The following pkgs should already be installed:

```
apache2 libapache2-mod-wsgi
```

1. Make a copy of django.wsgi.sample located in the \$ESP_HOME/share folder and copy it to the \$ESP_HOME/etc directory and then edit it as described below:

```
sudo su esp

cp /srv/esp/prod/share/django.wsgi.sample /srv/esp/prod/etc/django.wsgi

vi /srv/esp/prod/etc/django.wsgi
```

Update the contents of the file to match the following. Replace directory paths to match your environment if necessary.

```
import os
import sys

os.environ['DJANGO_SETTINGS_MODULE'] = 'ESP.settings'

# Enable this to prepend your ESP src folder to the beginning of
PYTHONPATH, in
# case an older version of Django is installed system-wide.

sys.path.insert(0, '/srv/esp/prod/')

execfile('/srv/esp/prod/bin/activate_this.py')

from django.core.wsgi import get_wsgi_application
application = get wsgi application()
```

2. Create the Apache configuration file. The name should match the name of your server

sudo vi /etc/apache2/sites-available/yourservername.conf

For example:

sudo vi /etc/apache2/sites-available/esp-server@domain.com.conf

Add the following contents and update highlighted sections as necessary to match your environment:

```
Sample Apache configuration file for ESP Health
WSGIRestrictStdout Off
WSGIDaemonProcess esp
WSGIScriptAlias / /srv/esp/prod/etc/django.wsgi
# Change "yourdomain.com" and "youremail" to match your environment
<VirtualHost yourdomain.com:80>
          ServerName hostname.yourdomain.com
          ServerAdmin youremail@yourdomain.com
          Alias /static/ /srv/esp/prod/ESP/media/static/
          Alias /media /srv/esp/prod/ESP/media
          # WSGI
           <Location "/media/">
                  SetHandler None
                  Require all granted
           </Location>
           <LocationMatch "\.(jpg|gif|png)$">
                  SetHandler None
                  Require all granted
          </LocationMatch>
          ### Block all trace requests (all vHosts need this!!)
           ### The following code should be included every VirtualHost.
           ### It returns a Forbidden on any TRACE or TRACK request.
           ### TRACE requests are used for debugging, they tell the server
           ### to return a text version of the REQUEST. This is not
           ### needed and can be used for abuse/cross-site-scripting
          ###
           ### See: http://www.w3.org/Protocols/rfc2616/rfc2616-sec9.html
          ### for more about TRACE
          ###
          RewriteEngine On
          RewriteCond %{REQUEST METHOD} ^(TRACE|TRACK|CONNECT)
          RewriteRule .* - [F]
          <Directory pro
   xy:*>
              Require all denied
          </Directory>
           <IfModule mod proxy.c>
              ProxyRequests Off
           </IfModule>
</VirtualHost>
```

3. Add required directory configurations to apache.conf

```
sudo vi /etc/apache2/apache2.conf
```

Beneath the following default section:

```
<Directory /var/www/>
         Options Indexes FollowSymLinks
        AllowOverride None
        Require all granted
</Directory>
```

Add the following:

4. Enable the required Apache modules.

5. Restart Apache

```
sudo service apache2 restart
or
sudo systemctl restart apache2
```

7 Opening inbound ports for iptables

If IP Tables are installed, at a minimum you will need to open the following ports 22,80,8543

```
sudo iptables -I INPUT -p tcp --dport ssh -j ACCEPT sudo iptables -I INPUT -p tcp --dport 8000 -j ACCEPT sudo iptables -I INPUT -p tcp --dport 8543 -j ACCEPT
```

8 Configure the ESP Application and create the UI user

1 - Create initial versions of ESP's **application.ini** and **secrets.ini** configuration files:

```
cd /srv/esp/prod
```

```
./bin/esp makeini
```

These files will be created in the /srv/esp/[prod or test]/etc/ folder.

```
2 - Edit the secrets.ini file:
```

```
vi ./etc/secrets.ini
```

For the **database_password**, enter the password for the "esp" database role.

For the **secret_key**, enter a random string of at least 32 characters.

3 - Edit the application.ini file:

vi ./etc/application.ini

```
In the [General] section, edit the following settings:
    site_name = Your Site Name
    data_folder = /srv/esp/data
    admins = your_email@your_host.com, another_email@your_host.com
    managers = your_email@your_host.com, another_email@your_host.com
    icd10_support = True
```

```
In the [Database] section, edit the following settings:
```

```
db_name = esp
username = esp
```

In the **[Web**] section, edit the following settings:

```
allowed_hosts = localhost,
```

```
In the [ETL] section, edit the following settings: load_report_dir = /srv/esp/data/load_reports/
Archive = True
```

In the **[Email]** section, edit the following setttings:

```
host = <enter your corporate mail server here>
    server_email = esp-no-reply@your_host.com
    default_from_email = esp-no-reply@your_host.com
```

In the [Site] section, edit the following settings:

```
site_header = ESP-YOURSITE
case_report_site_name = YOURSITE
site_clia = <enter your primary site CLIA here>
site_last_name = Jones
site_first_name = Bob
site_address1 = 133 AnyStreet Avenue
site_city = Boston
site_state = MA
site_zip = 02215
site_country = USA
site_email = bjones@yourhost.org
site_area_code = 617
site_tel_numeric = 1234567
site_app_name = ESP
site_sending_facility = YOURSITE
```

Other settings may be modified as necessary.

4 - As the ESP user, from the ESP installation directory, populate the media/static folder:

./bin/esp collectstatic

5 - As the ESP user, from the ESP installation directory, initialize the ESP database by entering:

```
./bin/esp migrate
```

6 - Install the Disease Detection Plugins you require:

```
./setupPlugins.sh
```

7 - Create an ESP UI superuser:

```
./bin/esp createsuperuser
Username (Leave blank to use 'esp'): esp
E-mail address: <your email address>
Password: <password for the esp superuser> enter secure password
Password (again): <password for the esp superuser>
```

Test that basic web services are working by running the web server built into Django by entering:

```
./bin/esp runserver
```

Browse to http://localhost:8000 and verify that you are able to log into the ESP application using the superuser account created earlier.

Exit the server using Ctrl-C

9 Setting up the data feed

Each site will need a data feed that provides data to ESP in the standard text file format. Please see the document ESP_Filespec.xlsx for details. For Epic sites, Commonwealth informatics can share SQL-based extract scripts for Epic Clarity, or MUMPS scripts for Epic Cache. These must be modified to conform to site-specific Epic configuration.

There are two data feed steps:

Set up the historic data extract and load. The ESP database should have at least two years of data going back from the present in order to make good determinations of disease states for conditions that may be chronic.

Set up the nightly data extract and load. This is for ongoing data extraction and loading

The ESP command "load_epic" is used to load the data file. ESP was developed around Epic systems, and this name is vestigial.

These are highly site-specific activities and must be designed, developed and tested at each site. Using Commonwealth-provided scripts will greatly reduce the time for this task, but for systems starting from the ESP filespec Excel spreadsheet, expect at least 4 weeks of person-effort.

10 Using ESP

ESP Commands

All ESP commands take this form:

```
$ $ESP_HOME/bin/esp command [--argument_one {optional parameters}] [--
argument_two]
(Most commands have single character versions of arguments, used with a
single dash)
```

For a full listing of available commands:

```
$ $ESP_HOME/bin/esp help
For help with a specific command:
$ $ESP HOME/bin/esp command --help
```

Load EMR data

A typical command to load data might look like this:

```
$ $ESP HOME/bin/esp load epic
```

The use of Epic in the command name is vestigial. This command loads text data from a set of files in the ESP defined input format. See the document "ESP_Filespec.xlsx".

This command will take files from the configured data directory ./epic/incoming and load them to the ESP database tables. Details are written to the esp.log file, and table specific load results are written to reports in load reports directory.

Code mapping

Each individual EMR system uses a unique set of codes to designate tests. We refer to these as abstract labs. Once EMR lab data is loaded to ESP, the native codes of relevant lab tests must be mapped to the named abstract labs used by ESP's disease detection logic. Mapping is stored in the table conf_labtestmap.

To perform lab mapping, run:

```
$ $ESP HOME/bin/esp concordance
```

The concordance command populates a table emr_labtestconcordnace, which lists all unique native lab test names and code currently loaded in the ESP emr_labresults table. These are available for efficient searches for mapping. A tool is provided in the Administrative web interface, (setup described in next section), In the menu bar, look under *Administration --> Unmapped Lab Tests Report*. This form page uses the set of search strings provided for each disease detection plugin to detect potentially unmapped lab tests. In the Unmapped Lab Tests Report interface, the user can either map a lab, or mark it to be ignored. Mapped and ignored labs do not appear in the Report again.

Detecting cases

Once all labs are mapped using the Admin UI interface, ESP divides the task of detecting disease cases into two distinct parts. First, a uniform table of events is generated from raw medical record data by *HEF*, the Heuristic Events Framework.

```
$ $ESP HOME/bin/esp hef
```

Second, a table of cases is generated by searching the events table for patterns indicating disease. This function is carried out by *Nodis*, the NOtifiable DISeases framework.

```
$ $ESP HOME/bin/esp nodis
```

Additional options for both commands are available by passing the '--help' flag.

Reporting cases

The process for electronically reporting cases is heavily dependent upon the requirements, both technical and functional, of the intended recipient. ESP provides two report generation commands: case_report and lab_report. The case_report command generated hI7 2.3.1 version lab report message, the lab_report command generated hI7 2.5.1 version lab report messages. Both require extensive coding for specific recipient requirements. Unfortunately, this mapping process is not currently well documented. We are working on developing a document set for this purpose.

11 Configure Database Backups

1. Create the logrotate configuration file

```
sudo su
mdkir -p /srv/esp/backup
vi /srv/esp/backup/postgresql-esp.logrotate
```

Populate the file by copying the configuration shown in Appendix A

2. Modify the permissions and ownership on the file/directory

```
chown -R postgres.postgres /srv/esp/backup
chmod 644 /srv/esp/backup/postgresql-esp.logrotate
```

3. Create initial versions of the "log" files

```
sudo su postgres
cd /srv/esp/backup

touch esp.daily.dump
touch esp.weekly.dump
touch esp.monthly.dump
```

4. While still the potgres users, add the following entry to the postgres user crontab to run the database backups. Choose a time that does not conflict with daily ESP processing. The example below is set to run at 1pm each day. The script referenced will be created in the next step.

5. Create the /srv/esp/scripts/db_backup.sh file

```
sudo su esp
vi /srv/esp/scripts/db_backup.sh
```

Populate it with the following:

/usr/sbin/logrotate /srv/esp/backup/postgresql-esp.logrotate

6. Set the permissions on script as follows:

```
chmod 755 /srv/esp/scripts/db backup.sh
```

12 Configure ESP Daily Status Reports

ESP will send a daily email showing information about the cases created and transmitted. Additionally, it will show unmapped lab tests and other information related to ESP.

1. Configure the application.ini file

```
sudo su esp
sudo vi /srv/esp/prod/etc/application.ini
```

In the **[General]** section at the top of the file, configure the managers to match your desired recipients.

Managers are emailed a copy of the daily status report, if it is enabled in the Batch section

```
managers = recip1@youremail.com, recip2@youremail.com,
```

Note the ending comma

In the **[Email]** section, configure your parameters. Set the host, port, server_email, and default_from_email to match your configuration.

```
[Email]
host = your_mail_server_or_ip_address
port = your_port_number (i.e. 25)
username = ""
use_tls = False
server_email = esp-no-reply@youremail.com
default_from_email = youremail@youremail.com
subject_prefix = "[ESP] "
```

**Note: If your server requires authentication, you will want to enter the username here and the password in the secrets.ini file

In the [Batch] section, set:

```
mail_status_report = True
```

2. To test if it is working, run the following command from the command line. It just sends the email and doesn't change any data, etc.

```
/srv/esp/prod/bin/esp status report --send-mail
```

13 Configure crontab to run Daily jobs

A sample daily_batch.sh script can be found within the core system repository. If using the default paths, this file will be found in the /srv/esp/prod/share folder. This is the script that is utilized to perform the daily processes for ESP (data load, event creation, case creation, etc).

This is just a sample script and should be modified/customized for your environment.

To enable daily data loading and processing, please the customized daily_batch.sh file in the /srv/esp/scripts folder.

As the ESP user, add a cron entry in your system:

```
sudo su esp
crontab - e
```

Add a similar text to the crontab with your desired time to run:

```
# ESP Production Daily Run
#
30 22 * * * /srv/esp/scripts/daily batch.sh
```

Save and quit

To verify the new crontab entry type:

```
crontab -1
```

14 Setting Up Basic Disease Detection

ESP is distributed with a number of Python plugins for disease detection. Each disease has a separate plugin. These plugins are installed via an interactive text-based screen started from the bash shell prompt:

```
$ /srv/esp/prod/setupPlugins.sh
```

This is also described in section 3 above. The plugins are installed into ~/esp/src/[disease name directories]

Configuring the disease plugins is a four-step process:

1. Run the esp concordance command

```
$ $ESP HOME/bin/esp concordance
```

2. The concordance command populates a table emr_labtestconcordance, which lists all unique native lab test names and codes currently loaded in the ESP emr_labresults table. These are available for efficient searches for mapping. A tool is provided in the Administrative web interface. From the menu bar, browse to Administration --> Unmapped Lab Tests Report. This form page uses the set of search strings provided for each disease detection plugin to detect potentially unmapped lab tests. In the Unmapped Lab Tests Report interface, the user can either map a lab or mark it to be ignored. Mapped and ignored labs do not appear in the report again.

The lab concepts required by the plugin must be mapped to the appropriate local labs. The required lab concepts are determined by inspection of the plugin file [disease_name].py. This step requires site support from staff familiar with local lab naming and the corresponding lab test.

3. Run the esp commands hef and nodis:

```
$ $ESP_HOME/bin/esp hef
$ $ESP HOME/bin/esp nodis
```

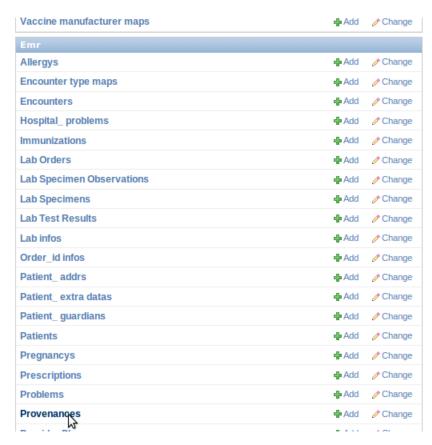
4. Review the resulting cases and perform appropriate clinical validation to confirm that data configuration is correct and working. Cases are available for review in the ESP administrative web interface. Case validation requires site support from staff with the ability to do case review in the EHR.

15 How to Clean Up and Reload ESP Data

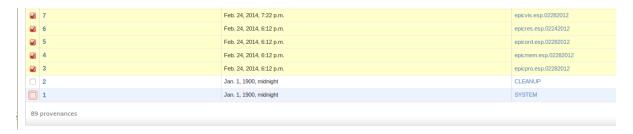
Sometimes it is helpful to know how to clean all the data loaded and start over again. There are several procedures that can be run to accomplish this task but the simplest is to delete all the provenance entries from the administration UI except the first two. This method will automatically delete all of the related records in the db.

Below are the steps and screen shots to perform this task:

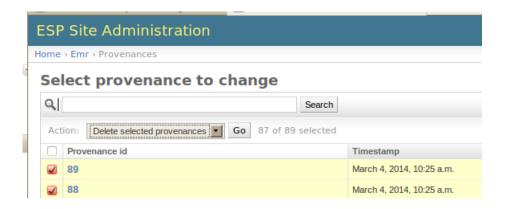
- 1. From the ESP UI Select Administration -> Site Administration from the menu
- 2. Click on "Provenances" from the "Emr" section



3. Select all records by clicking on the top left check box next to the Provenance id label and then **unselect** the two checkboxes for the record 1 and 2 corresponding to CLEANUP and SYSTEM



4. From the same screen, select "Delete selected provenances" from the "Action" drop down. Next, click "Go" via the button to the right of the dropdown.



5. This will calculate all the related records and elements in the database related to those loaded files and will display a summary of all the records that will be deleted.

A confirmation window with the prompt "Are you sure you want to delete the selected provenances? All of the following objects and their related items will be deleted." will appear.

To continue, scroll down to the bottom and click on the "Yes, I am sure" button:

```
Etl error: EtlError object
Provenance: epicord.esp.02282012 | 2014-02-24 18:12:30.213522 | ubuntu
Provenance: epicmem.esp.02282012 | 2014-02-24 18:12:30.068639 | ubuntu
Provenance: epicpro.esp.02282012 | 2014-02-24 18:12:30.000706 | ubuntu
Yes, I'm sure
```

Appendix A PostgreSQL database backup

The following configuration should be saved as /srv/esp/backup/postgresql-esp.logrotate.

```
# Logrotate configuration for automatic daily backups of the PostgreSQL
# database 'esp' to '/srv/esp/backup/esp.daily.dump'.
# Please note, this configuration does not make any attempt to divine your
# database name from ESP's config files. Edit it if you are using something
# different than 'esp'. You may wish to run logrotate in the context of
# user 'postgres' to avoid dealing with DB authentication issues. The user
# running logrotate will need write permission in /srv/esp/backup.
/srv/esp/backup/esp.daily.dump {
   daily
   rotate 7
   dateext
   nomissingok
   create
   nocompress
   nocopy
   prerotate
       test -x /usr/bin/pg dump || exit 0
       sudo -u postgres /usr/bin/pg dump esp -F c > /srv/esp/backup/esp.daily.dump
   endscript
/srv/esp/backup/esp.weekly.dump {
   weekly
   rotate 4
   dateext
   nomissingok
   create
   nocompress
   nocopy
   prerotate
        test -x /usr/bin/pg_dump || exit 0
       sudo -u postgres /usr/bin/pg dump esp -F c > /srv/esp/backup/esp.weekly.dump
   endscript
/srv/esp/backup/esp.monthly.dump {
   monthly
   rotate 12
   dateext
   nomissingok
   create
   nocompress
   nocopy
   prerotate
        test -x /usr/bin/pg dump || exit 0
        sudo -u postgres /usr/bin/pg dump esp -F c > /srv/esp/backup/esp.monthly.dump
   endscript
```