



Developer's Guide

i2b2 Workbench

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I2b2 Software Release: 1.5

Table of Contents

About this Guide	4
1. Prerequisites	5
1.1 Third Party Software	5
1.1.1 Java JDK	5
1.1.2 Eclipse	5
1.2 i2b2 Software	5
1.2.1 i2b2 Workbench Source Code	5
2. Install and Configure	8
2.1 Setting up the i2b2 Workbench within Eclipse 3.5	8
2.1.1 i2b2 Workbench Project Files	8
2.1.2 Importing the i2b2 Workbench projects	9
2.2 Building the i2b2 Workbench within the Eclipse IDE	13
2.2.1 Java Compiler Settings	13
2.2.2 Cleaning and Building the Projects	15
2.3 Running the i2b2 Workbench within the Eclipse IDE	17
2.3.1 Define Run Configurations	17
2.3.1.1 Main Tab	19
2.3.1.2 Arguments Tab	19
2.3.1.3 Plug-ins tab	22
2.3.2 Running the i2b2 Workbench Application	22
2.3.2.1 Reconfiguring the default layout	26
3. Package Structure	27
4. Eclipse (i2b2) Feature	28
4.1 Creating a New “Feature” Project	28
4.2 Feature Manifest (feature.xml)	33
4.2.1 Opening the Feature Manifest Editor	34
4.2.2 Overview Tab	34
4.2.3 Information Tab	35
4.2.3.1 Feature Description	35
4.2.3.2 Copyright Notice	36
4.2.3.3 License Agreement	37
4.2.3.4 Sites to Visit	38
4.2.4 Plug-ins Tab	39
4.2.4.1 Adding and Removing Plug-ins and Fragments	40
4.2.4.2 Update Version of Plug-ins and Fragments	40
4.2.4.3 Update Plug-in Details	43
4.2.5 Included Features Tab	43
4.2.6 Dependencies Tab	44
4.2.6.1 Dependency Properties	45
4.2.7 Installation Tab	45
4.2.8 Build Tab	46
4.2.9 Feature.xml Tab	47

4.2.10	Build.properties Tab	48
<i>License</i>		<i>49</i>

ABOUT THIS GUIDE

Informatics for Integrating Biology and the Bedside (i2b2) is one of the sponsored initiatives of the NIH Roadmap National Centers for Biomedical Computing (<http://www.bisti.nih.gov/ncbc/>).

One of the goals of i2b2 is to provide clinical investigators broadly with the software tools necessary to collect and manage project-related clinical research data in the genomics age as a cohesive entity; a software suite to construct and manage the modern clinical research chart.

1. PREREQUISITES

1.1 Third Party Software

1.1.1 Java JDK

JDK 6.0 is recommended and can be downloaded from the java website:

<http://java.sun.com/products/archive/>

1. Install the SDK into a directory of your choice.

Example: `/opt/java/jdk1.6.0` or `YOUR_JAVA_HOME_DIR`

1.1.2 Eclipse

You will need to use version 3.5 of the Eclipse SDK (Galileo), available at:

<http://www.eclipse.org/downloads/>.

To install Eclipse, extract the downloaded zip file into a directory such as C:\

 ***If you install a new version of Eclipse, be sure to install it in an area separate from any previous Eclipse installations.***

Further information regarding the eclipse product can be found on their website (<http://www.eclipse.org/documentation/>).

1.2 i2b2 Software

1.2.1 i2b2 Workbench Source Code

The latest version of the source code for the i2b2 Workbench needs to be downloaded.

1. Go to the i2b2 website (<http://www.i2b2.org>)
2. At the top of the page there is a navigation bar, click on “**Software**” to go to the *software page*.



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MISSION

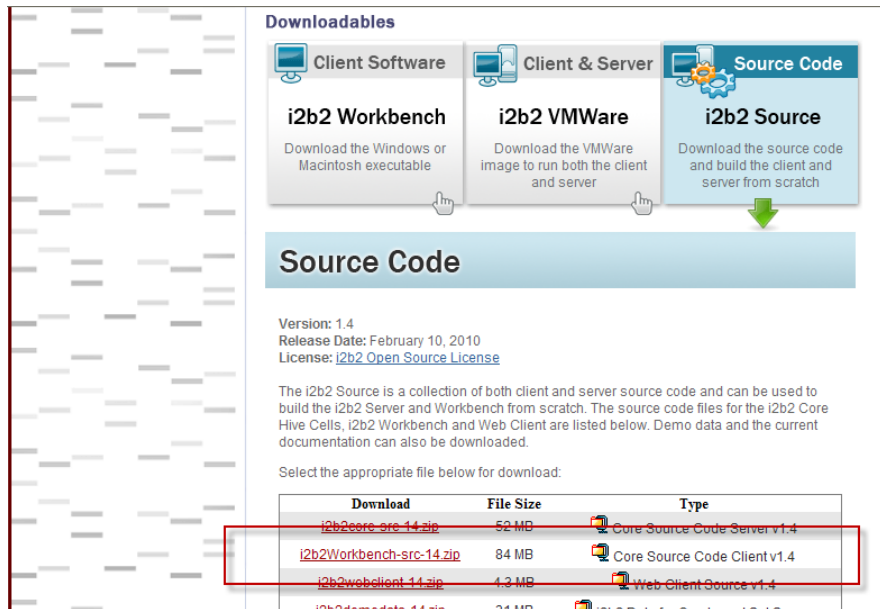
i2b2 (Informatics for Integrating Biology

3. Once the software page loads, scroll down to the section called **Downloads**.
4. Click on the **Source Code** box.

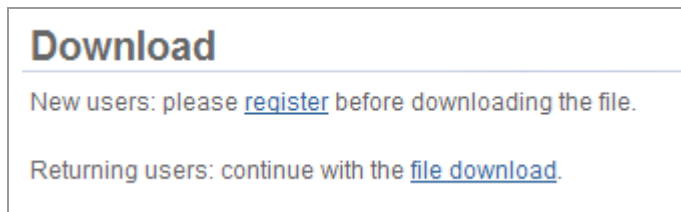
Downloadables

 Client Software	 Client & Server	 Source Code
i2b2 Workbench Download the Windows or Macintosh executable	i2b2 VMWare Download the VMWare image to run both the client and server	i2b2 Source Download the source code and build the client and server from scratch

5. Information about the latest version and a list of zip files available for downloading will appear.
6. Click on **i2b2Workbench-src-14.zip**.



7. The **Download** page will open. At this point, if you are not already a registered user you will need to do so. If you are a returning user you can click on the “**file download**” link.



8. The next step is to review the i2b2 license and choose to either accept or decline.
 - a. If you choose to **Decline** you will be brought back to the main i2b2 Software page.
 - b. If you agree with the license click on **Accept** to continue with the download.
9. Save the zip file in a directory of your choice.

2. INSTALL AND CONFIGURE

2.1 Setting up the i2b2 Workbench within Eclipse 3.5

If launching eclipse for the first time, either via an eclipse application shortcut or *eclipse.exe*, you will be greeted by a Welcome page.



Click on the arrow labeled Workbench to startup the eclipse SDK.

2.1.1 i2b2 Workbench Project Files

The project software is contained in the Eclipse “*Archive*” file called **i2b2Workbench-src-14.zip**, which you downloaded in the previous section. In this file are the following Eclipse projects:

1. BuildAssist
2. edu.harvard.i2b2.common
3. edu.harvard.i2b2.eclipse
4. edu.harvard.i2b2.eclipse.featurcore
5. edu.harvard.i2b2.eclipse.plugins.analysis

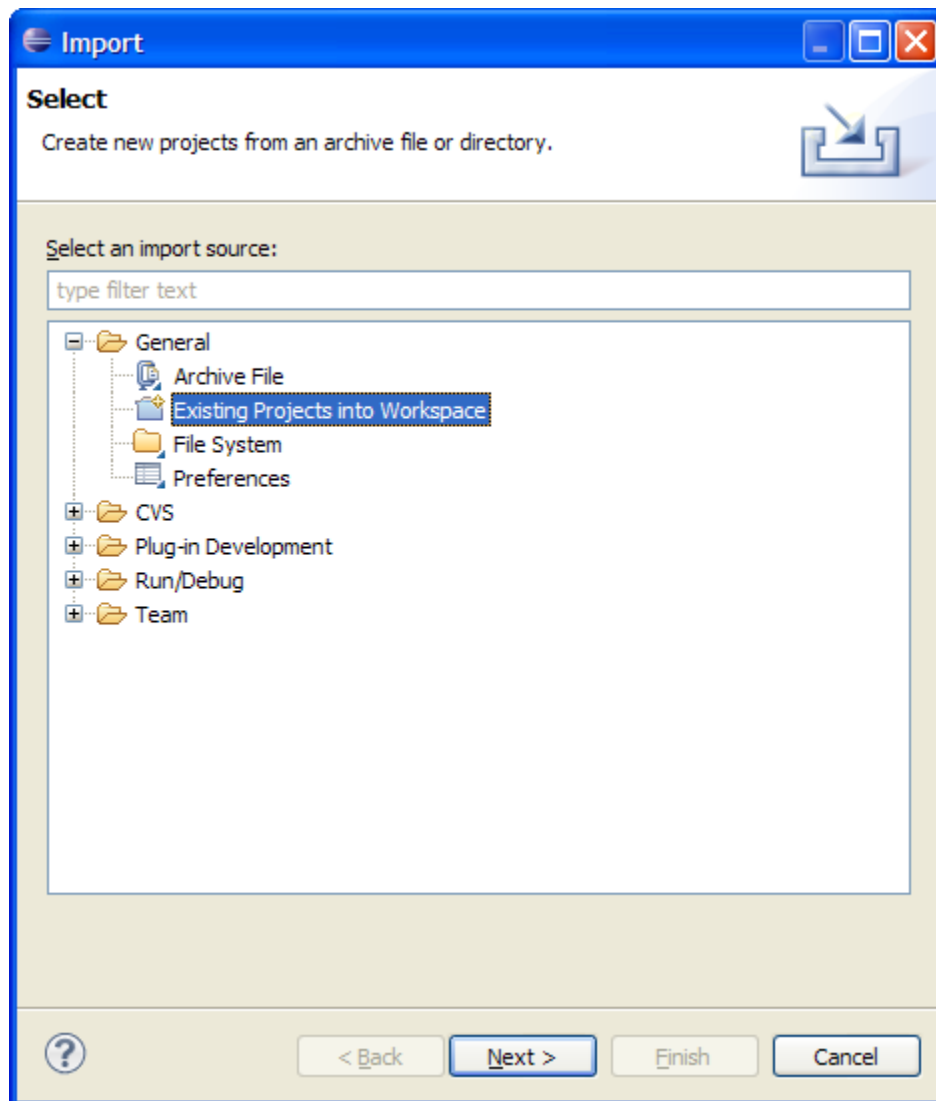
6. edu.harvard.i2b2.eclipse.plugins.common.apache
7. edu.harvard.i2b2.eclipse.plugins.explorer
8. edu.harvard.i2b2.eclipse.plugins.jdnc_support
9. edu.harvard.i2b2.eclipse.plugins.log
10. edu.harvard.i2b2.eclipse.plugins.ontology
11. edu.harvard.i2b2.eclipse.plugins.previousQuery
12. edu.harvard.i2b2.eclipse.plugins.query
13. edu.harvard.i2b2.eclipse.plugins.webservicesAxis2
14. edu.harvard.i2b2.eclipse.plugins.workplace
15. edu.harvard.i2b2.eclipse.plugins.xml_support_jaxb
16. edu.harvard.i2b2.eclipse.plugins.xml_support_jdom
17. edu.harvard.i2b2.xml



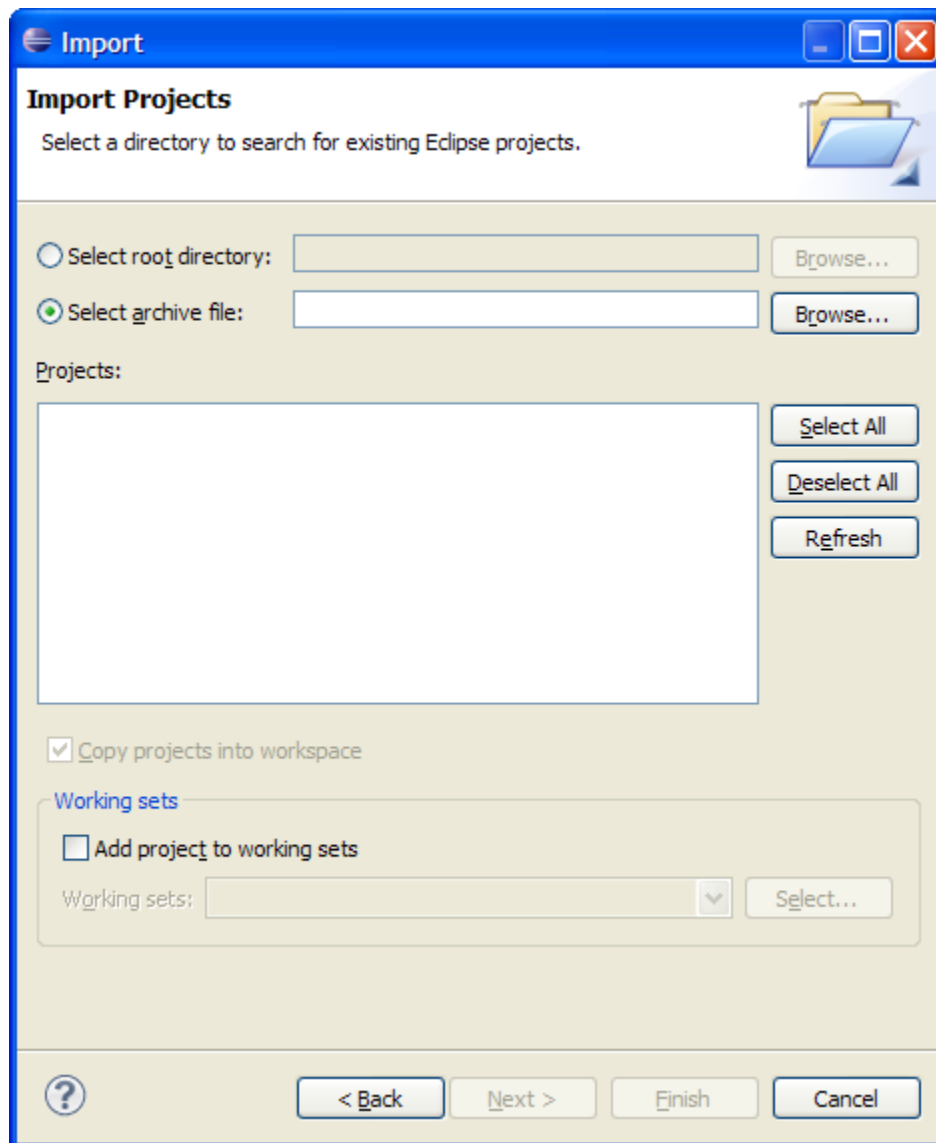
For additional information on the above projects please see the section called “Package Structure”.

2.1.2 Importing the i2b2 Workbench projects

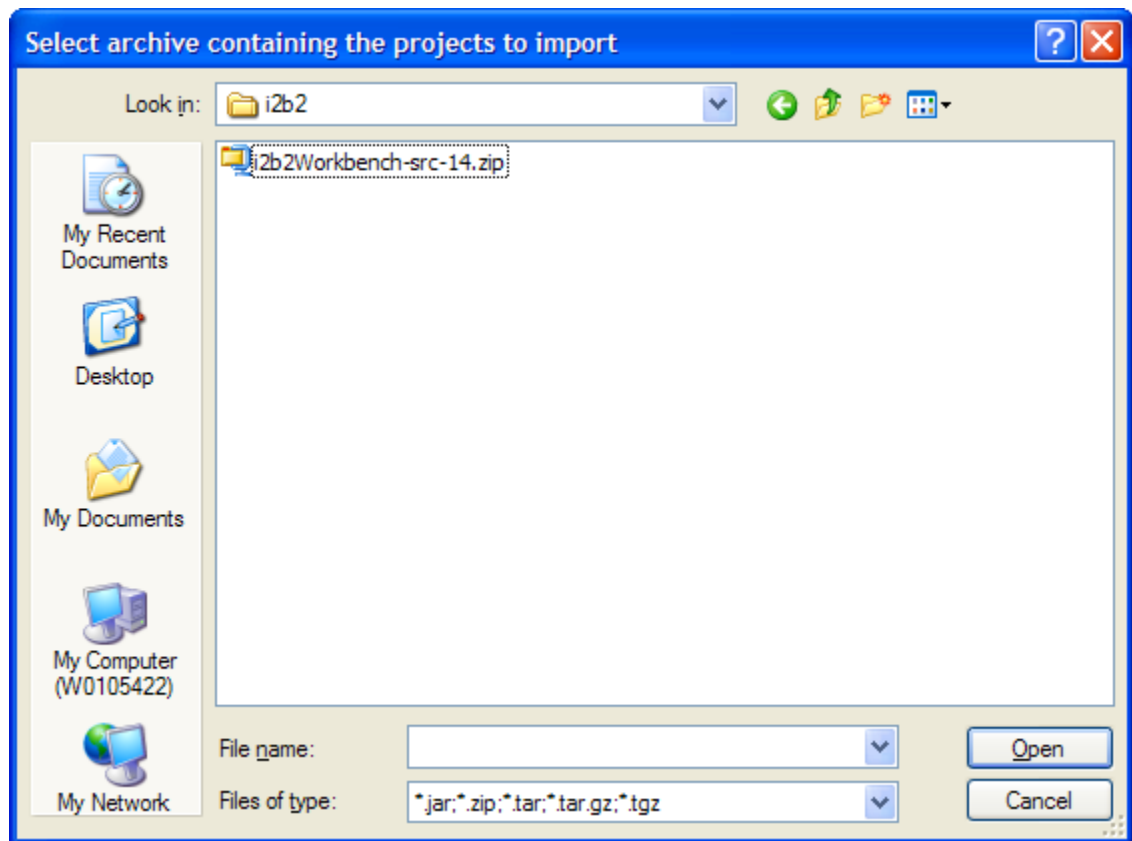
1. Run eclipse and select a workspace whose *pathname* does not contain spaces.
Example (correct): c:\workspace\i2b2workbench
Example (incorrect): c:\eclipse workspace\i2b2workbench
2. Select **File** from the toolbar in Eclipse and then select **Import** from the drop down menu.
3. The *Import dialog box* will open.
4. Double click on the folder called **General** and then select **Existing Projects into Workspace**.



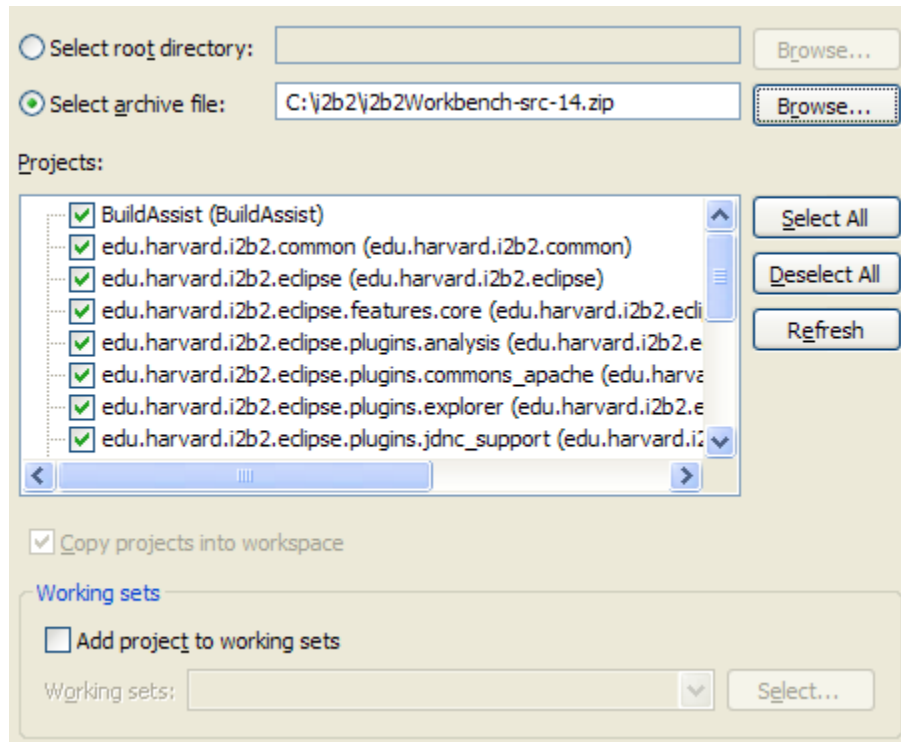
5. Click on the **Next** button.
6. The *Import Projects* page of the import wizard will open.
7. Click on the radial button next to **Select archive file**.



8. Enter the path of the archive file or browse for the location where you downloaded the zip file (***i2b2Workbench-src-14.zip***).



9. Once you open the zip file, the projects will appear in the *Import dialog box*.



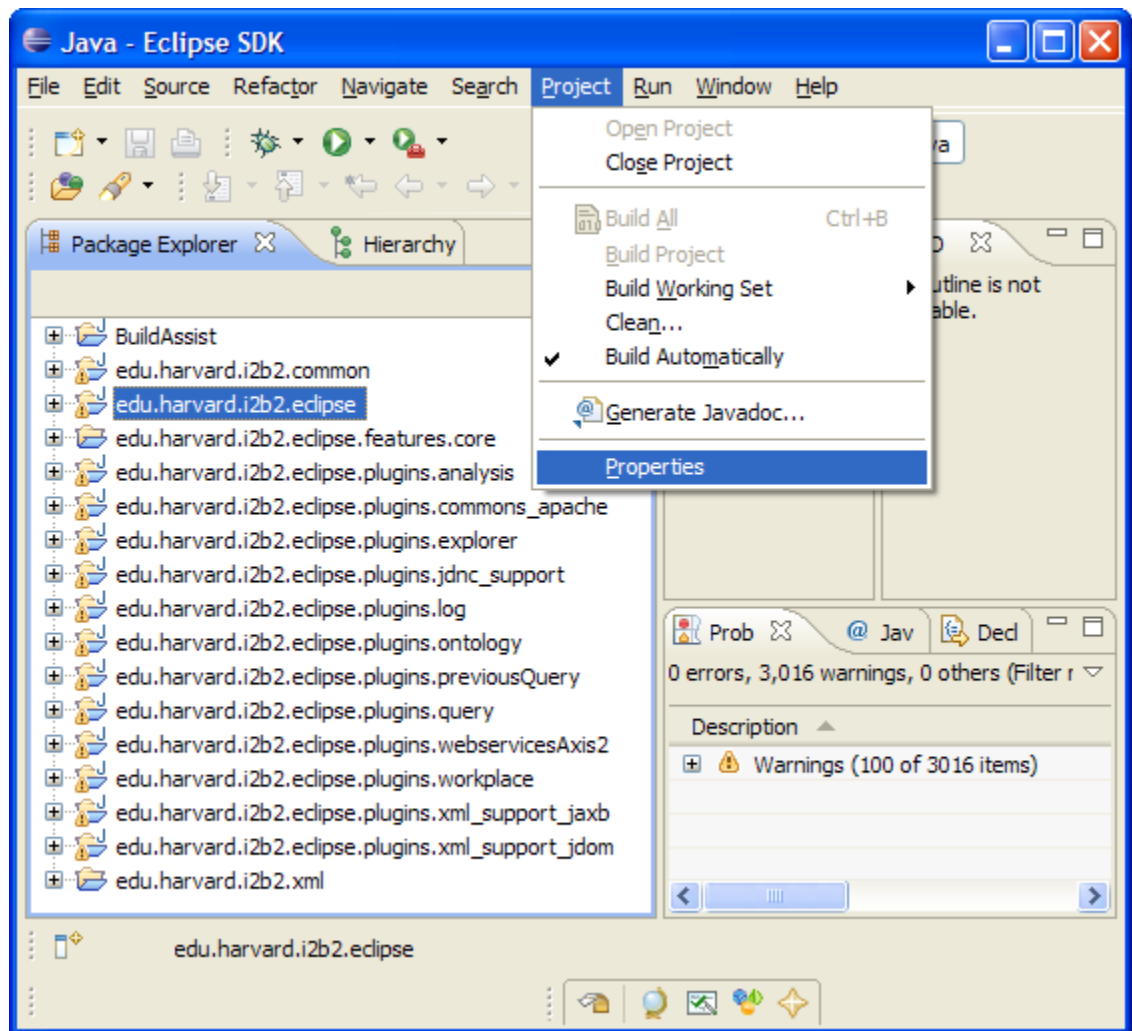
10. Verify all the projects are checked off
11. Click on the **Finish** button.
12. Once the projects have finished importing they will appear in your Eclipse Workbench.

2.2 Building the i2b2 Workbench within the Eclipse IDE

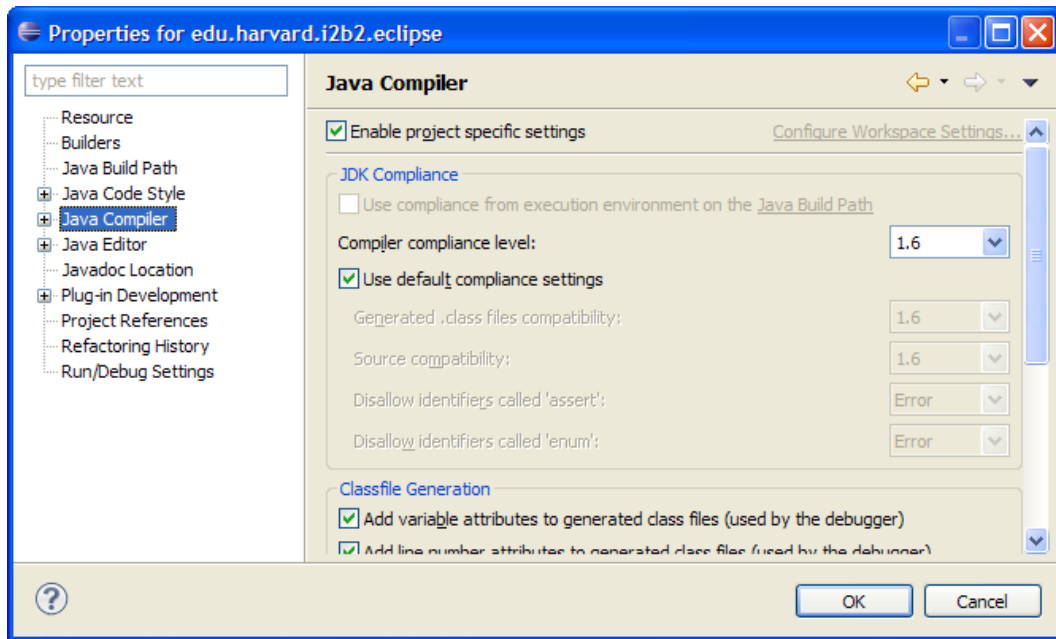
2.2.1 Java Compiler Settings

Check your Java Compiler settings by clicking on **edu.harvard.i2b2.eclipse** and then by clicking on *Projects* located on the Eclipse toolbar. Select *Properties* from the drop down menu.

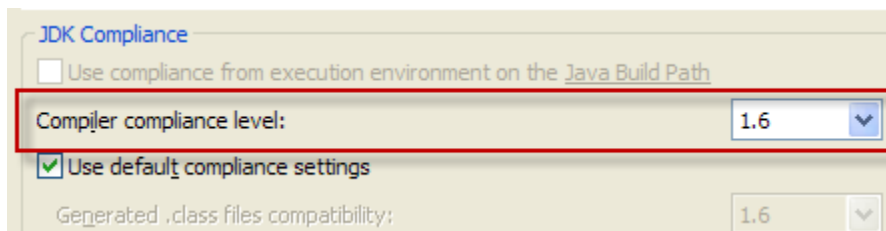
1. In the Eclipse workbench, click on the **edu.harvard.i2b2.eclipse** project.
2. On the Eclipse menu bar, click on **Project** and then select **Properties** from the drop down menu.



3. In the left navigation bar of the Properties window click on Java Compiler.



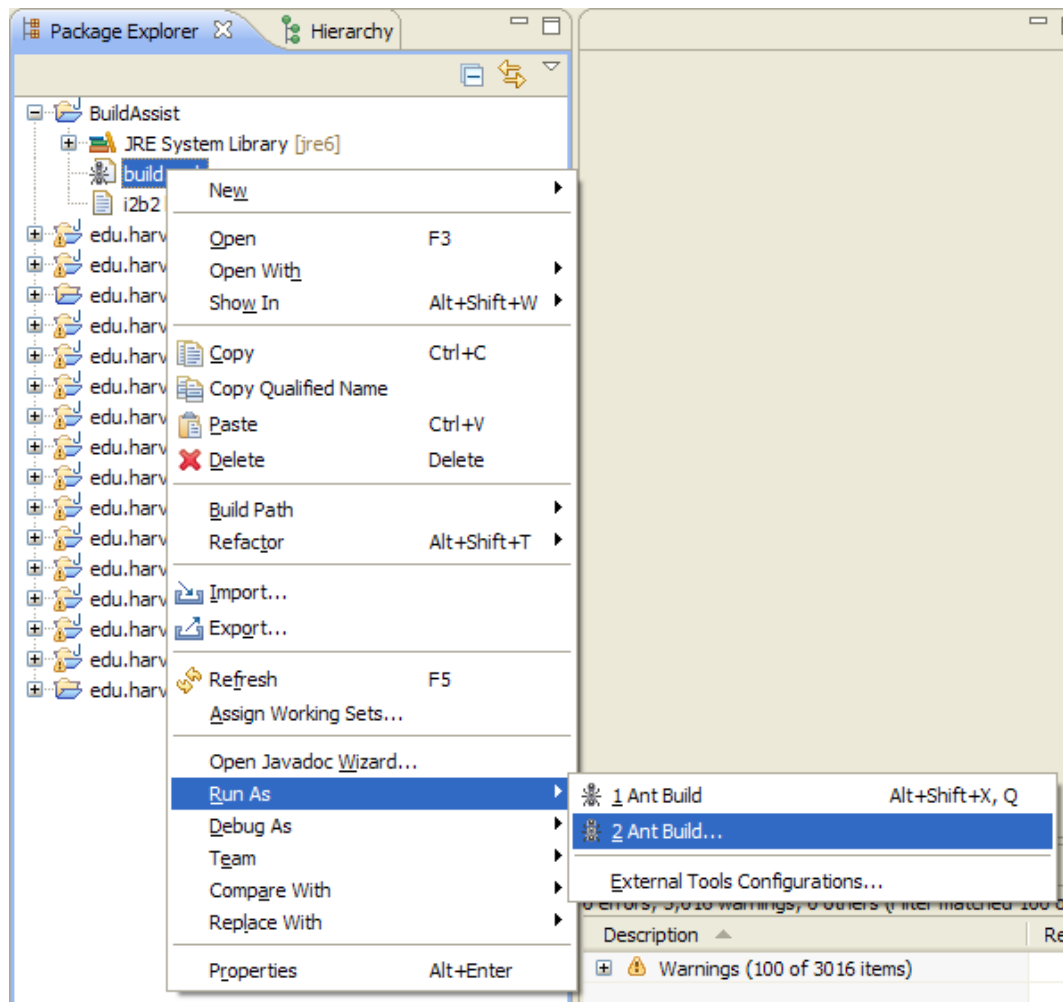
4. Verify the Compiler compliance level is set to 1.6.



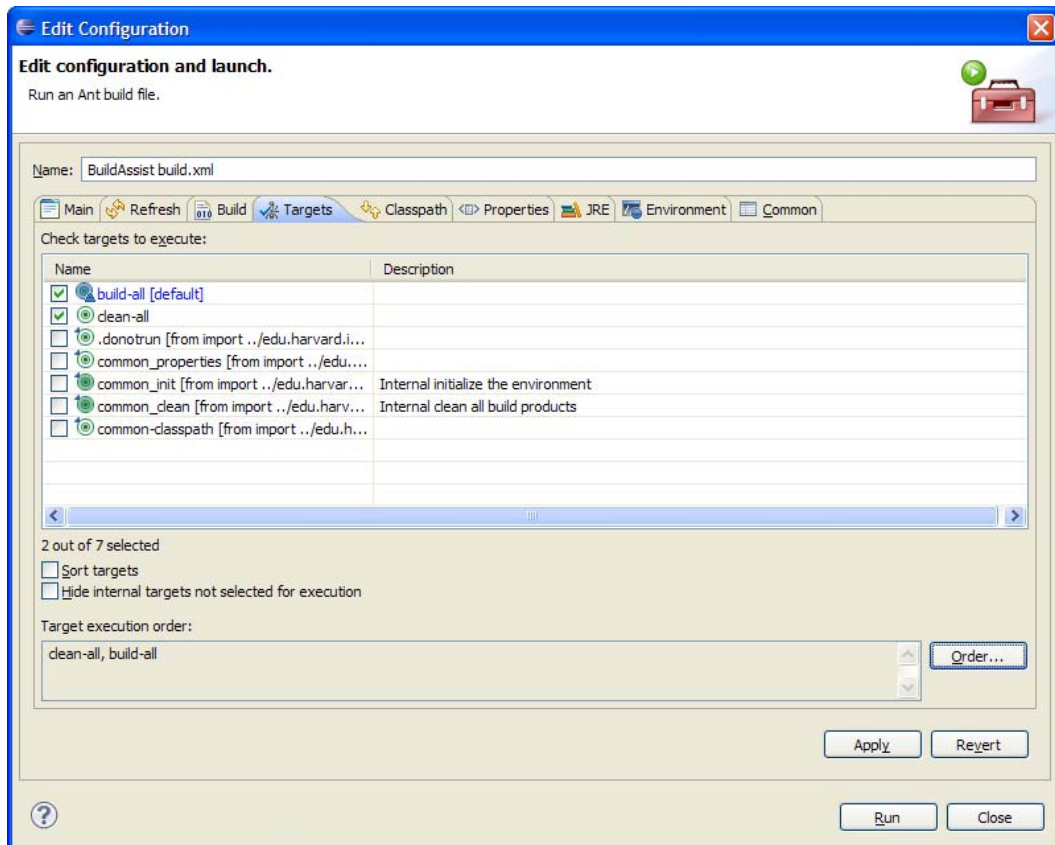
2.2.2 Cleaning and Building the Projects

The following steps outline the process of cleaning and building the projects.

1. Double click on the **BuildAssist** project to open the folder.
2. Right click on the **build.xml** file and select **Run As** from the menu.
3. On the sub-menu there are two **Ant-Build** options, select the second occurrence.



4. The build *Configuration* dialog box will open. Verify the following settings:
 - a. The **clean-all** and **build-all** boxes are checked.
 - b. The **target execution** order is: “clean-all, build-all”



5. Click on the **Run** button to execute.
6. The last step in the build process is to **refresh** all the projects.
 - a. Select all the projects.
 - b. Right click on the projects and select Refresh from the menu.

 *Eclipse will automatically build your workbench once the refresh has completed.*

2.3 Running the i2b2 Workbench within the Eclipse IDE

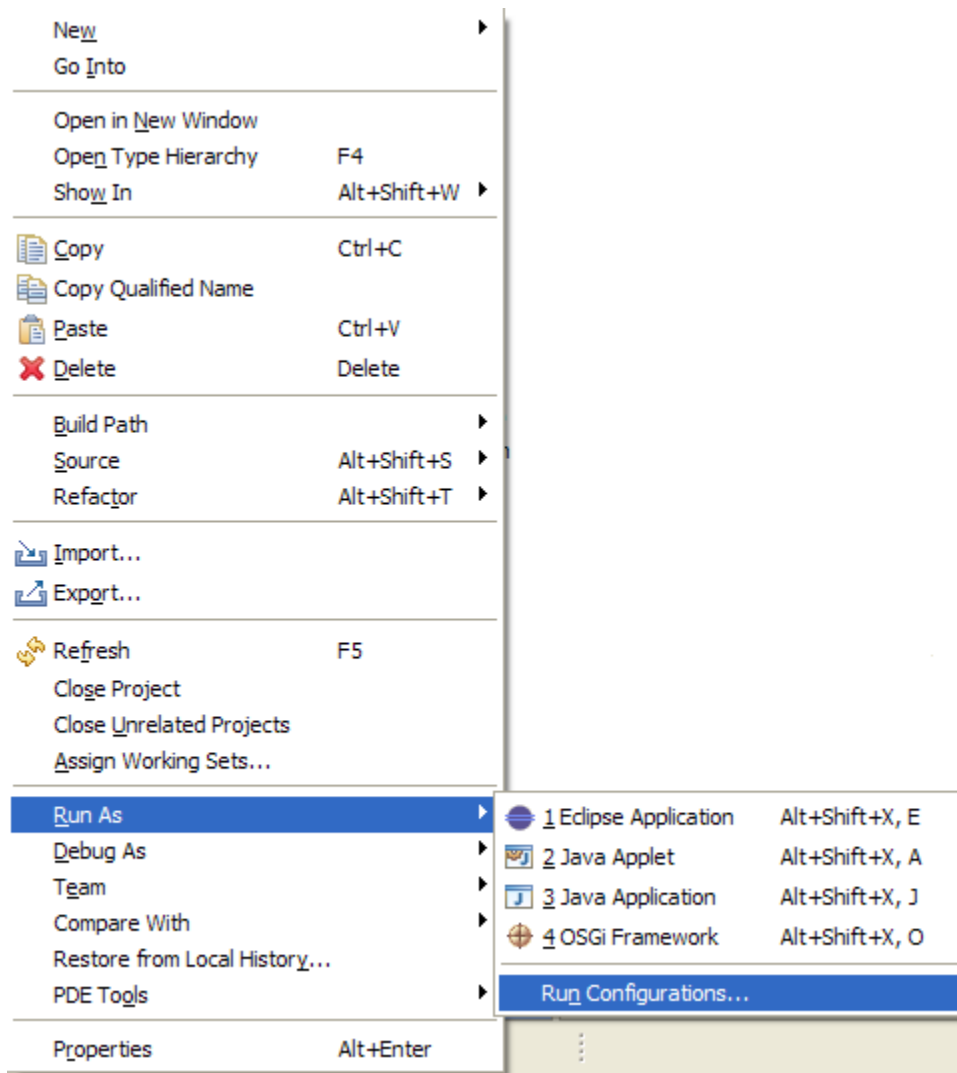
2.3.1 Define Run Configurations

In order to run the i2b2 Workbench from within Eclipse you need to define the run configurations.

 *You only need to set up the run configuration once.*

Steps to access the Run Configurations window:

1. Right click the **edu.harvard.i2b2.eclipse** project.
2. Select **Run As** from the pop-up menu and **Run Configurations** from the sub-menu.



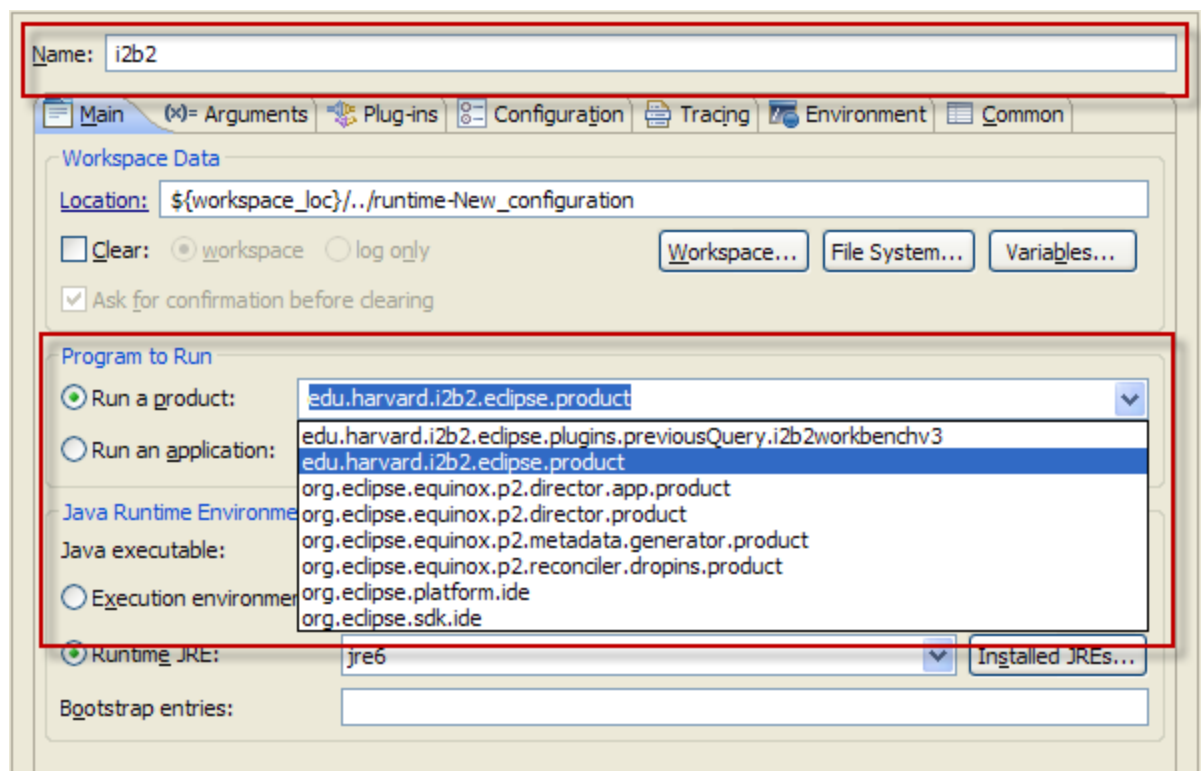
The next three sections outline the process of setting up the configuration information on the *Main*, *Arguments*, and *Plug-ins* tabs.

2.3.1.1 MAIN TAB

1. Double click on “**Eclipse Application**” to create a new configuration.
2. Enter a meaningful name at the name field

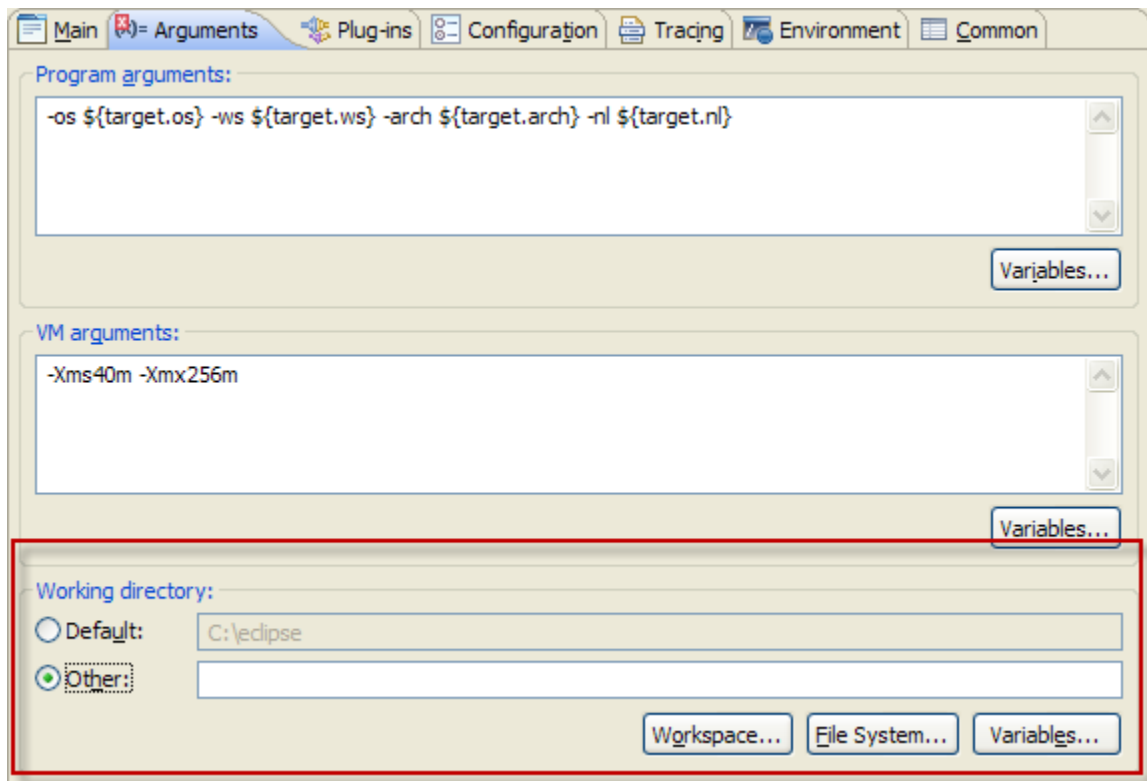
Example: “i2b2”

3. Verify the dial next to “**Run a product:**” is selected.
4. Click on the arrow to display the list of products and select **edu.harvard.i2b2.eclipse.product** from the drop down list.

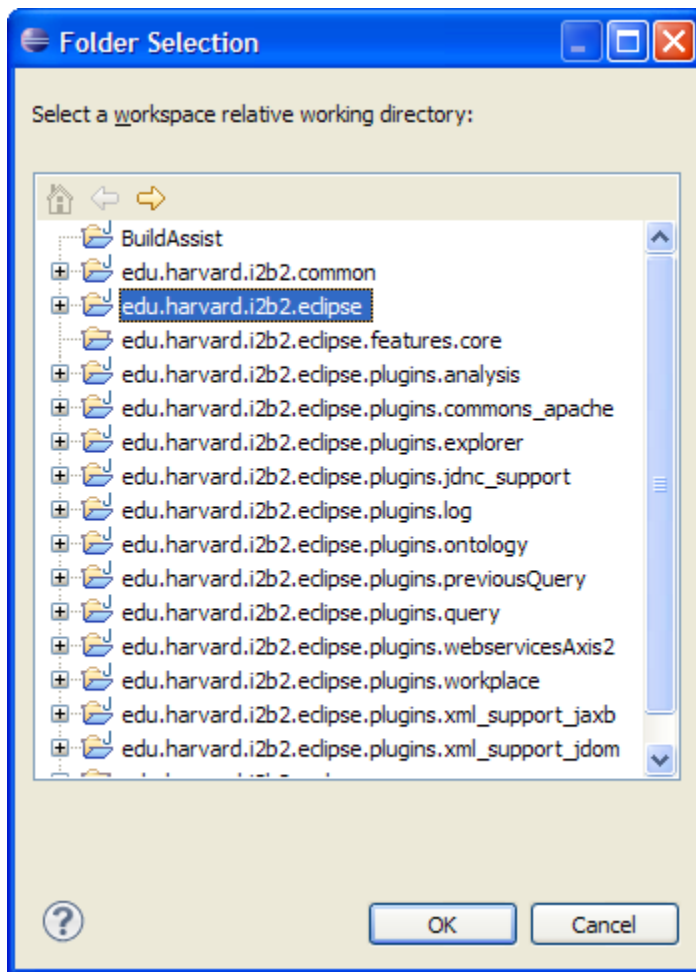


2.3.1.2 ARGUMENTS TAB

1. Click on the “**Arguments**” tab.
2. In the “**Working directory:**” section click on “**Other**”

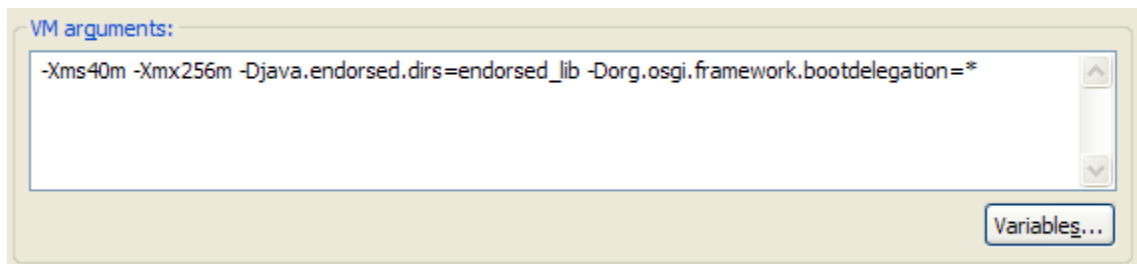


3. Click on the “**Workspace**” button.
4. The *Folder Selection* window will open.
5. Select **edu.harvard.i2b2.eclipse** and click on the “**OK**” button.



6. In the “**VM arguments:**” section add the following:

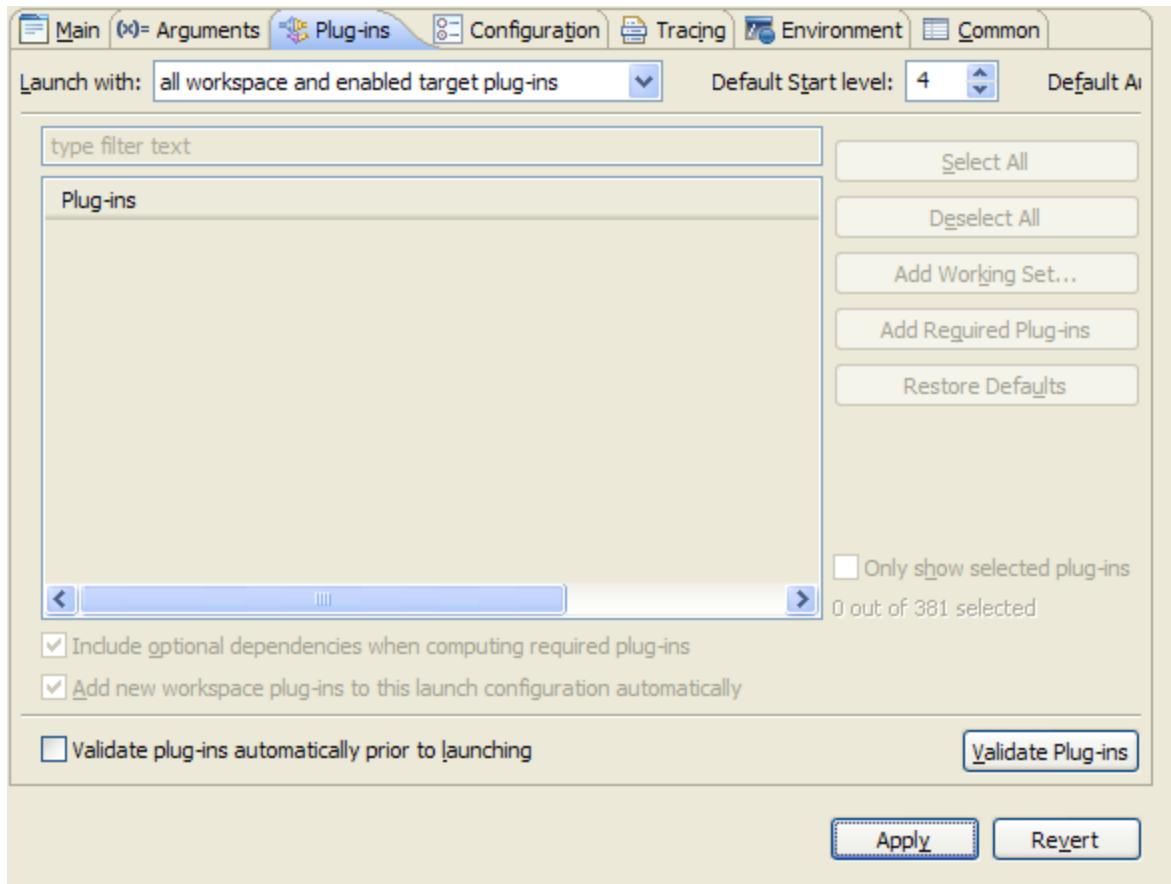
- Djava.endorsed.dirs=endorsed_lib
- Dorg.osgi.framework.bootdelegation=*



 ***-Xms40m and -Xmx256m should already default. If not then these also need to be added.***

2.3.1.3 PLUG-INS TAB

You can configure any combination of workspace plug-ins and target platform plug-ins as your IDE configuration. The default is that all of the workspace and target platform plug-ins are selected.



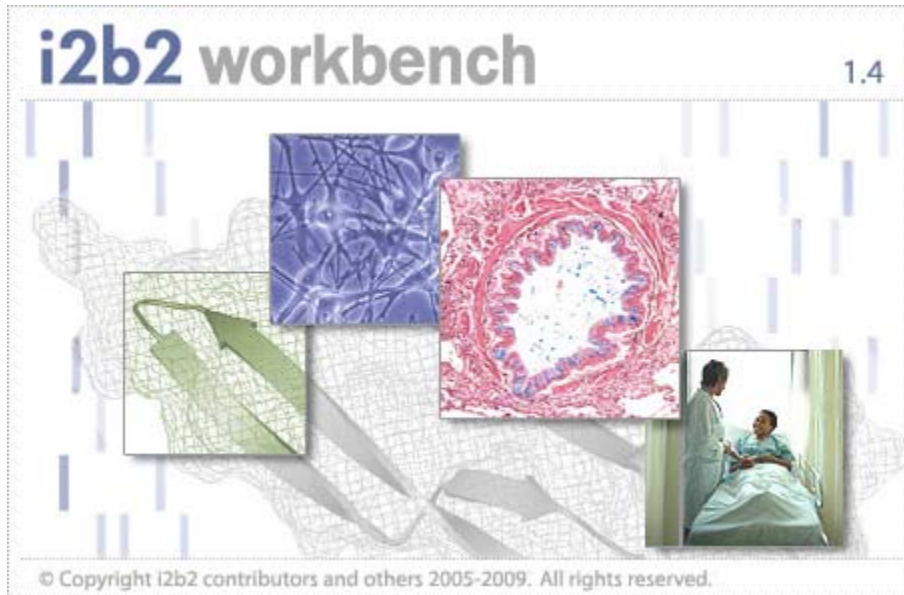
! ***At this time we recommend that you click on the “Apply” button to save your settings.***

2.3.2 Running the i2b2 Workbench Application

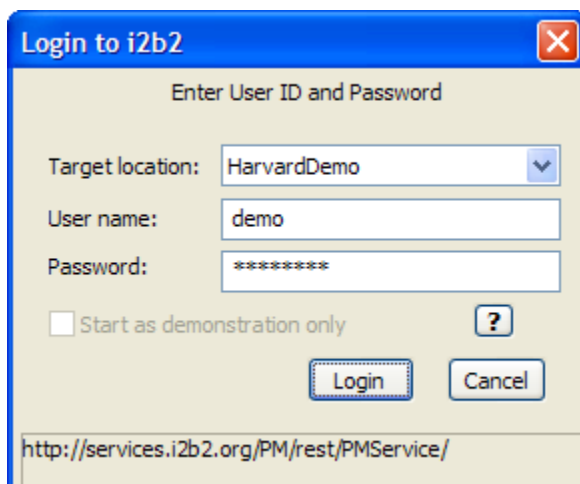
The following steps outline the process of running and logging into the i2b2 Workbench.

 **The below steps assume you are starting from within the Run Configurations window. Please see the above section if you need to know how to access this window.**

1. Click on the **“Run”** button to run the i2b2 Workbench under control of the Eclipse IDE.
2. The i2b2 Workbench splash screen will appear.



3. The **Login** dialog box will open.


A Windows-style dialog box titled 'Login to i2b2'. It has a blue title bar with a close button. The main area is light beige and contains the text 'Enter User ID and Password'. There are three input fields: 'Target location:' with a dropdown menu showing 'HarvardDemo', 'User name:' with the text 'demo', and 'Password:' with masked characters '*****'. Below these is a checkbox labeled 'Start as demonstration only' which is unchecked, and a help button with a question mark. At the bottom are 'Login' and 'Cancel' buttons. A status bar at the very bottom shows the URL 'http://services.i2b2.org/PM/rest/PMService/'.

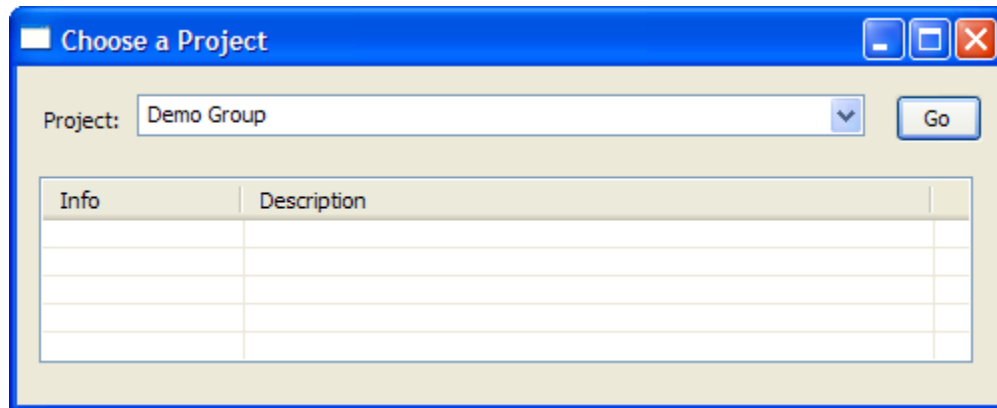
4. Enter the following information:

User name: demo


Password: demouser

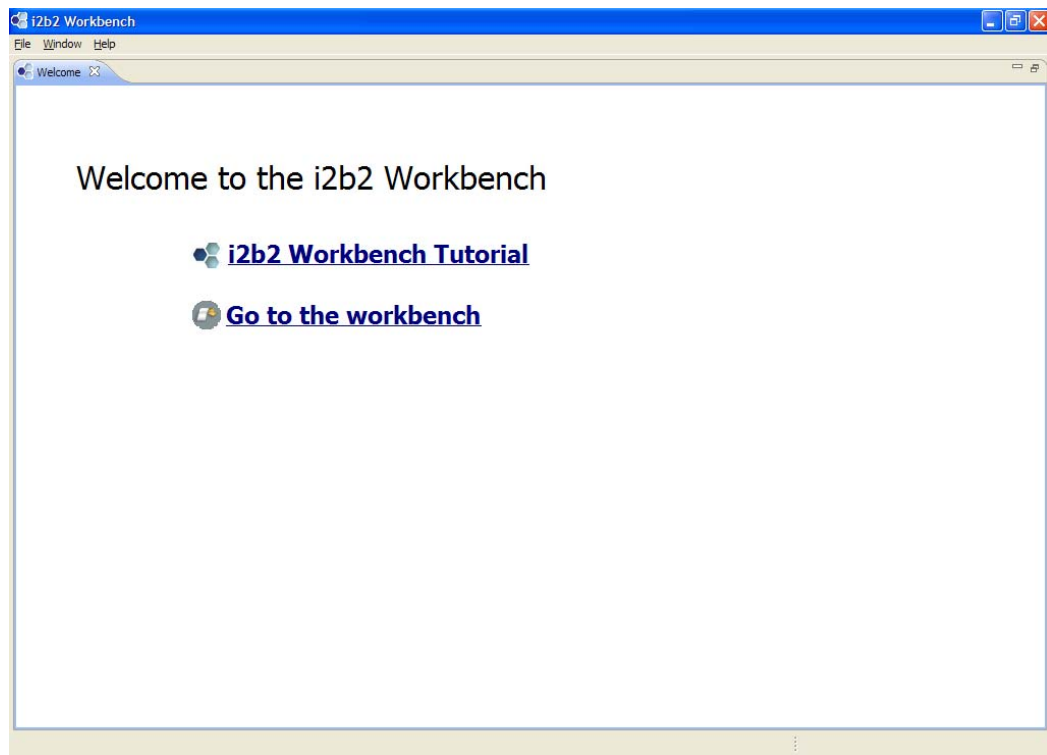
5. Click on the “**Login**” button.
6. The **Choose a Project** dialog box will open.

 *The project dialog box will only appear if you have access to multiple projects. If you only have access to one project you will be brought to the Welcome page.*

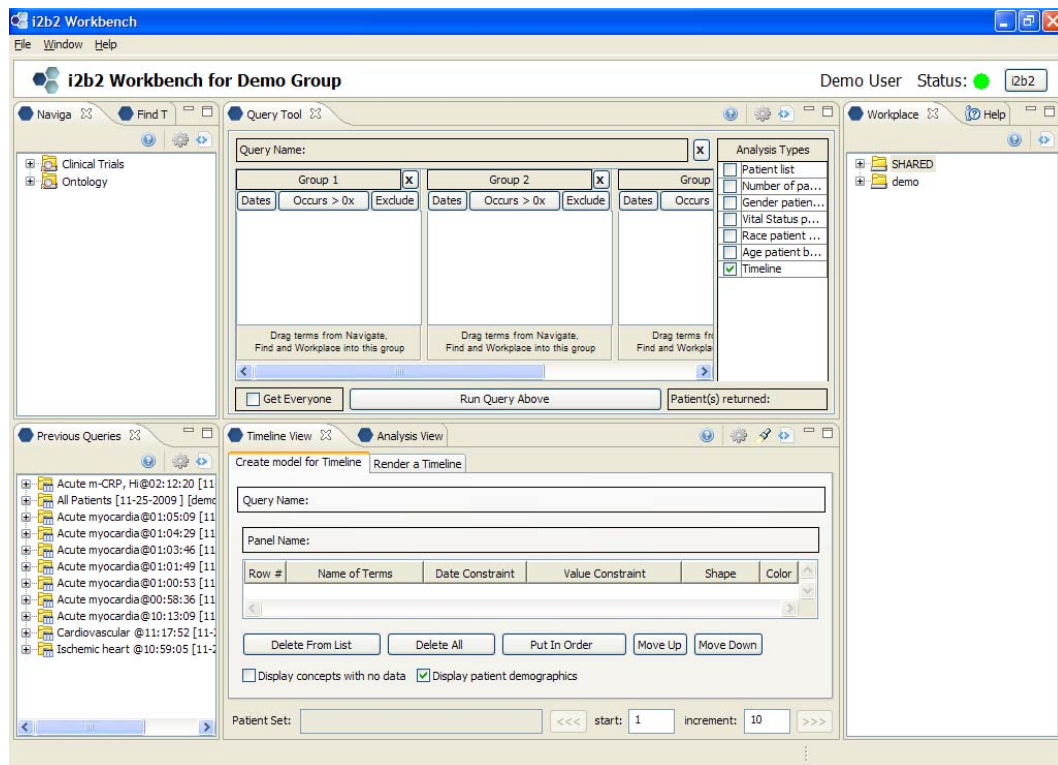


7. Accept the default project by simply clicking on the “**Go**” button.
8. The **Welcome** page will open.

 *The welcome page will open the first time you login. All subsequent logins will bring you directly to the i2b2 desktop. You can access the welcome page anytime by selecting it from the Help menu on the toolbar.*



9. Click on **Go to the workbench**.
10. The **desktop** of the i2b2 Workbench will open.



2.3.2.1 RECONFIGURING THE DEFAULT LAYOUT

The default layout can be reconfigured to the users needs.

- On the toolbar, click on **Window** and select "**Show View**" from the drop down menu.
- Click on the views you would like to add.
- Move the position of any open view by clicking on its tab and dragging it to another position.

3. PACKAGE STRUCTURE

The **archive file** contains the following projects. The project/directory **edu.harvard.2b2.eclipse** is considered the *base plug-in* for the project and contains project properties files and configuration files.

Directory	Description
BuildAssist	Files to build the workbench
edu.harvard.i2b2.common	Common core exception, jaxb, and utilities used by i2b2 hive
edu.harvard.i2b2.eclipse	The base plug-in for our development (namely the UI for the top panel)
edu.harvard.i2b2.eclipse.features.core	The base features plug-in for the i2b2 core views.
edu.harvard.i2b2.eclipse.plugins.analysis	UI for the Analysis view.
edu.harvard.i2b2.eclipse.plugins.common.apache	Third party jars needed for common functions
edu.harvard.i2b2.eclipse.plugins.explorer	UI for the Timeline view
edu.harvard.i2b2.eclipse.plugins.jdnc_support	Third party jars needed for UI support
edu.harvard.i2b2.eclipse.plugins.log	Third party jars needed for logging
edu.harvard.i2b2.eclipse.plugins.ontology	UI for the Ontology view
edu.harvard.i2b2.eclipse.plugins.previousQuery	UI for the Previous Query view
edu.harvard.i2b2.eclipse.plugins.query	UI for the Query view
edu.harvard.i2b2.eclipse.plugins.webservicesAxis2	Third party jars needed for web service support
edu.harvard.i2b2.eclipse.plugins.workplace	UI for the Workplace view
edu.harvard.i2b2.eclipse.plugins.xml_support_jaxb	Third party jars needed for jaxb/message processing
edu.harvard.i2b2.eclipse.plugins.xml_support_jdom	Third party jars needed for jdom/message processing
edu.harvard.i2b2.xml	XSD for the hive

4. ECLIPSE (I2B2) FEATURE

In Eclipse the plug-ins can be packaged together as an Eclipse Feature. The edu.harvard.i2b2.eclipse.features.core plug-in is the baseline Eclipse Feature for the i2b2 Workbench. Included in this feature are the core i2b2 Views and required plug-ins to run the i2b2 Workbench. As optional views are developed they will be packaged up into a feature and added to an update site where users can easily install the new view from within the i2b2 Workbench.

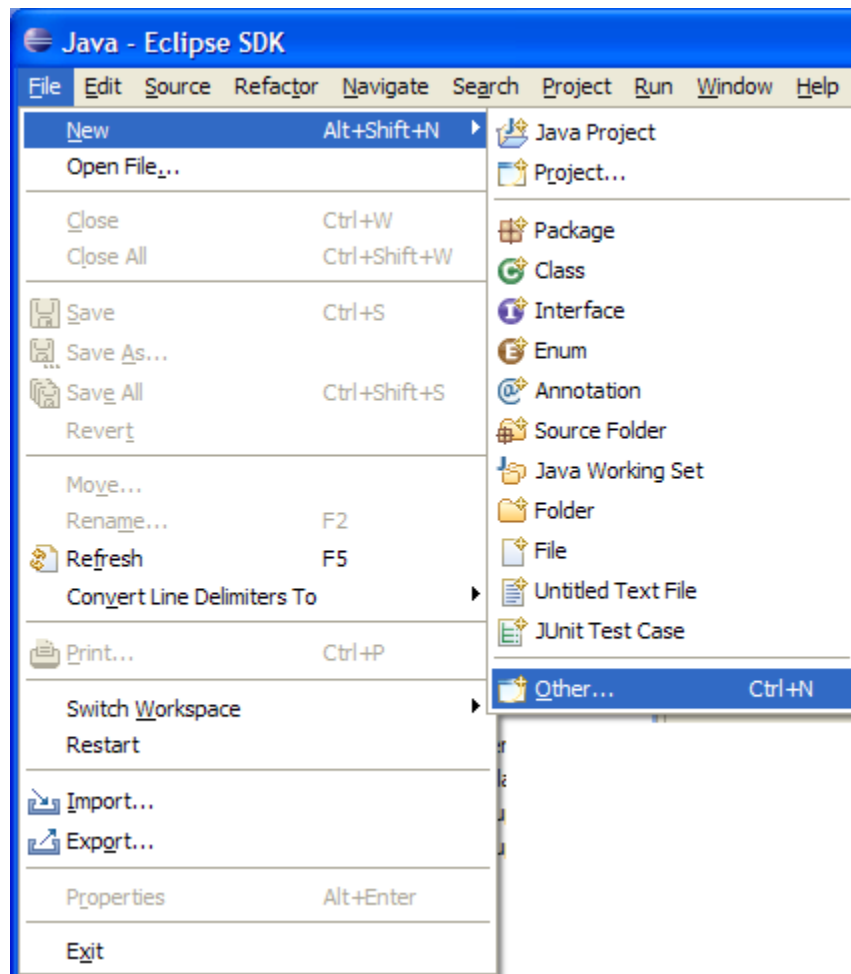


The following sections provide a general overview. For more detailed information about Eclipse Features please go to the Eclipse website.

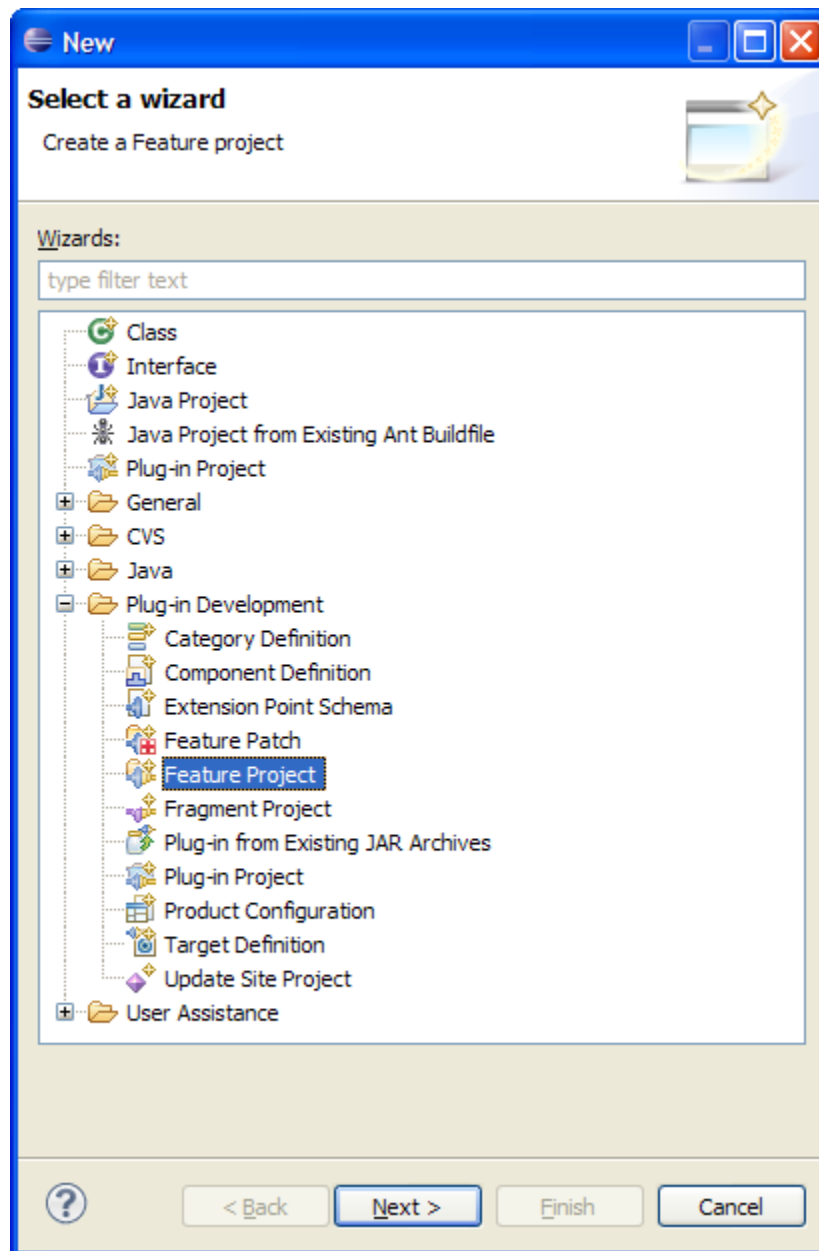
4.1 Creating a New “Feature” Project

The following steps outline how to create a new Feature Project.

1. On the Eclipse menu bar click on **File**.
2. Select **New** from the drop down menu and **Other** from the sub-menu.



3. The **New** dialog box will open to the **Select Wizard** page.
4. Double click on **Plug-in Development** to open the folder.
5. Click on **Feature Project**.



6. Click on the **Next** button.
7. The **New Feature** dialog box will open to the **Feature Properties** page.

New Feature

Feature Properties
Define the name of the new feature project

Project name:

☒ Use default location

Location:

Feature properties


Feature ID:

Feature Name:

Feature Version:

Feature Provider:

Install Handler Library:

8. At the **Project Name** field enter the name of the new feature project.
-  *As you enter the **Project Name** the **Feature ID** and **Feature Name** fields will automatically be populated.*
9. Enter the provider of this feature at the **Feature Provider** field.

New Feature

Feature Properties

Define properties that will be placed in the feature.xml file

Project name:

☒ Use default location

Location:

Feature properties

Feature ID:

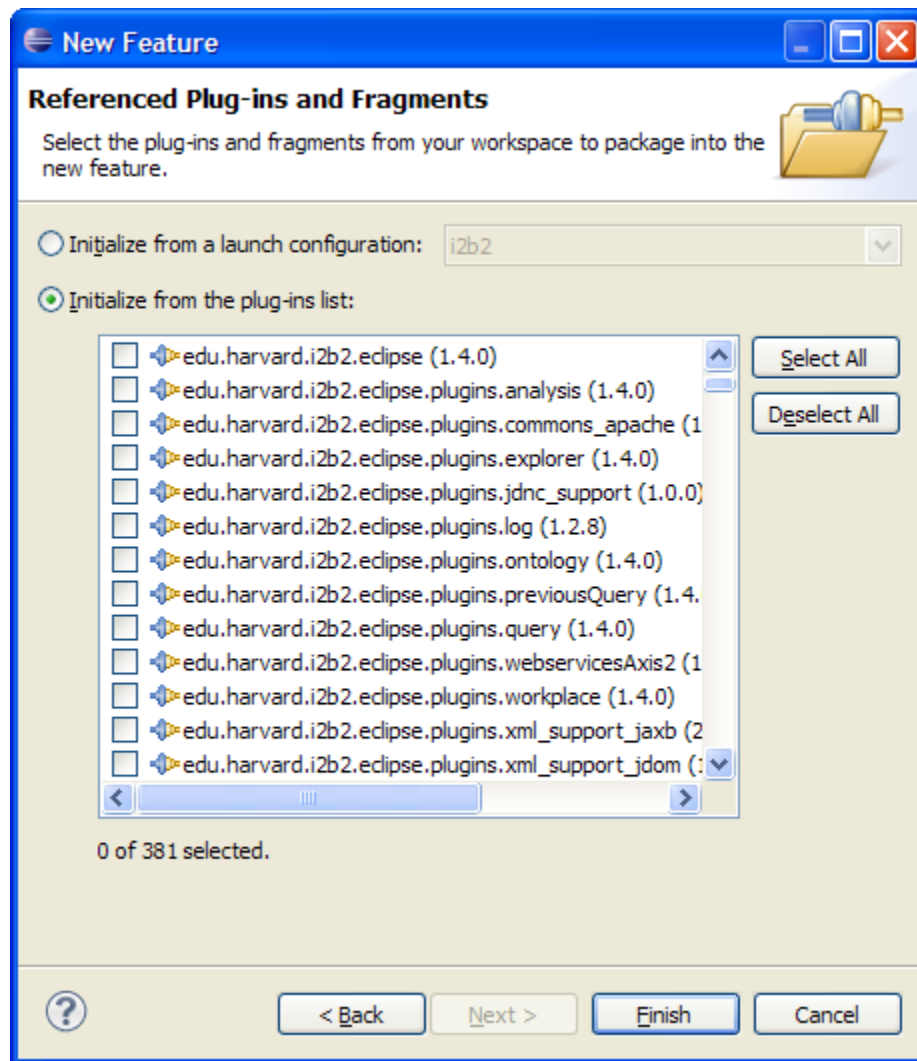
Feature Name:

Feature Version:

Feature Provider:

Install Handler Library:

10. Click on the **Next** button.
11. The **Referenced Plug-ins and Fragments** page will open.
12. Select the plug-in(s) you want to include in the feature.



13. Click on the **Finish** button.

14. The feature project is created and now appears in your workspace.

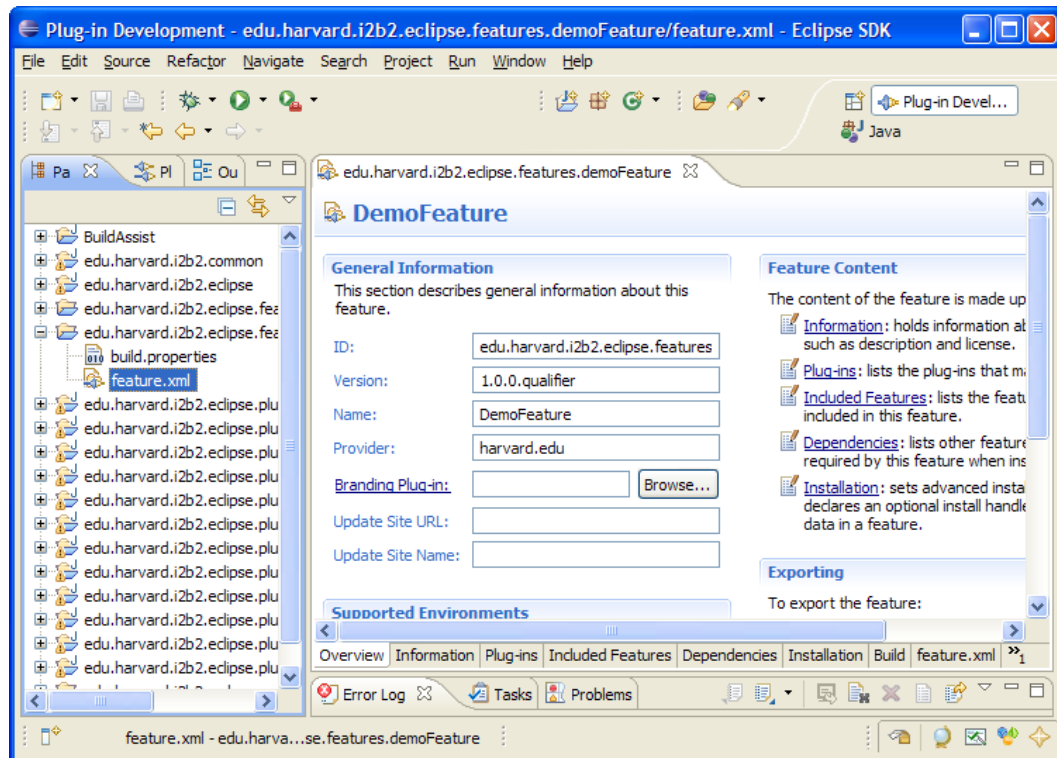
4.2 Feature Manifest (feature.xml)

Eclipse automatically creates a manifest or central file that contains all the information needed for the feature to work. This file is called the feature.xml and contains license and copyright information as well as the required plug-ins, dependencies and builds information.

4.2.1 Opening the Feature Manifest Editor

The following outlines how to open the **Feature Manifest Editor**.

1. In the list of projects, double click on the name of the feature you created in the earlier section called *'Creating a New "Feature" Plug-in'*.
2. Double click on the **feature.xml** file.
3. The **Feature Manifest Editor** will open to the **Overview** page.



4.2.2 Overview Tab

The **Overview** page contains basic information about the feature.

edu.harvard.i2b2.eclipse.features.demoFeature

DemoFeature

General Information
This section describes general information about this feature.

ID:

Version:

Name:

Provider:

Branding Plug-in:

Update Site URL:

Update Site Name:

Supported Environments
Specify environment combinations in which this feature can be installed. Leave blank if the feature does not contain platform-specific code.

Operating Systems:

Window Systems:

Languages:

Architecture:

Feature Content
The content of the feature is made up of five sections:

- Information:** holds information about this feature, such as description and license.
- Plug-ins:** lists the plug-ins that make up this feature.
- Included Features:** lists the features that are included in this feature.
- Dependencies:** lists other features and plug-ins required by this feature when installed.
- Installation:** sets advanced installation options, declares an optional install handler and non-plugin data in a feature.

Exporting
To export the feature:

1. [Synchronize](#) versions of contained plug-ins and fragments with their version in the workspace
2. Specify what needs to be packaged in the feature archive on the [Build Configuration](#) page
3. Export the feature in a format suitable for deployment using the [Export Wizard](#)

Publishing
To publish the feature on an update site:

1. Create an [Update Site Project](#)
2. Use the site editor to add the feature to the site, and build the site

Overview | Information | Plug-ins | Included Features | Dependencies | Installation | Build | feature.xml | build.properties

4.2.3 Information Tab

The **Information** page contains several pages for entering a *description*, *copyright notice*, *license agreement* and *sites to visit*. All of this information is visible to the user when they install the feature from within the i2b2 Workbench.

4.2.3.1 FEATURE DESCRIPTION

The first page to appear when selecting the *Information* page is the **Feature Description**. This page allows you to enter a brief description that users will see when installing this feature. You can also enter a URL address of where the user can go to see additional information.

The screenshot shows a web browser window titled 'edu.harvard.i2b2.eclipse.features.demoFeature'. The main content area is titled 'Information' and contains the instruction: 'Enter description, license and copyright information. Optionally, provide links to update sites for installing additional features.' Below this instruction are four tabs: 'Feature Description', 'Copyright Notice', 'License Agreement', and 'Sites to Visit'. The 'Feature Description' tab is currently selected. It contains an 'Optional URL:' field with the value 'http://www.i2b2.org' and a 'Text:' label next to a large text area. The text area contains the following text: 'Demonstration/Sample feature to show how to create and edit features for the i2b2 Workbench.' At the bottom of the window is a tabbed interface with the following tabs: 'Overview', 'Information', 'Plug-ins', 'Included Features', 'Dependencies', 'Installation', 'Build', 'feature.xml', and 'build.properties'.

edu.harvard.i2b2.eclipse.features.demoFeature

Information

Enter description, license and copyright information. Optionally, provide links to update sites for installing additional features.

Feature Description Copyright Notice License Agreement Sites to Visit

Optional URL:

Text:

Demonstration/Sample feature to show how to create and edit features for the i2b2 Workbench.

Overview Information Plug-ins Included Features Dependencies Installation Build feature.xml build.properties

4.2.3.2 COPYRIGHT NOTICE

Clicking on the tab for the **Copyright Notice** page will allow you to enter any copyright information that is required for this feature.

edu.harvard.i2b2.eclipse.features.demoFeature

Information

Enter description, license and copyright information. Optionally, provide links to update sites for installing additional features.

Feature Description Copyright Notice License Agreement Sites to Visit

Optional URL:

Text:

```
/*
 * Copyright (c) 2006-2010 Massachusetts General Hospital
 * All rights reserved. This program and the accompanying
 * materials
 * are made available under the terms of the i2b2 Software
 * License
 * v2.1 which accompanies this distribution.
 */
```

Overview Information Plug-ins Included Features Dependencies Installation Build feature.xml build.properties

4.2.3.3 LICENSE AGREEMENT

The information you enter on the **License Agreement** page will appear during the installation of the feature in the i2b2 Workbench. Users will have to accept the license in order to continue with the installation process. If they do not want to accept the license then they will not be able to install the feature.

edu.harvard.i2b2.eclipse.features.demoFeature

Information

Enter description, license and copyright information. Optionally, provide links to update sites for installing additional features.

Feature Description Copyright Notice **License Agreement** Sites to Visit

Optional URL:

Text:

```
i2b2 Software License ("Software License")
Version 2.1 - 1/15/2009
This Software License covers downloads from the i2b2
project
("i2b2") maintained by the Brigham and Women's Hospital,
Inc.
("BWH").
Your downloading, copying, modifying, displaying,
distributing
or use of any software and/or data from i2b2
```

Overview Information Plug-ins Included Features Dependencies Installation Build feature.xml build.properties

4.2.3.4 SITES TO VISIT

The **Sites to Visit** page is an optional page that you can use to provide your users with a list of additional update sites.

edu.harvard.i2b2.eclipse.features.demoFeature

Information

Enter description, license and copyright information. Optionally, provide links to update sites for installing additional features.

Feature Description Copyright Notice License Agreement Sites to Visit

Add URLs of other update sites to visit while looking for new features. Specify a meaningful site name and the site URL.

URL:

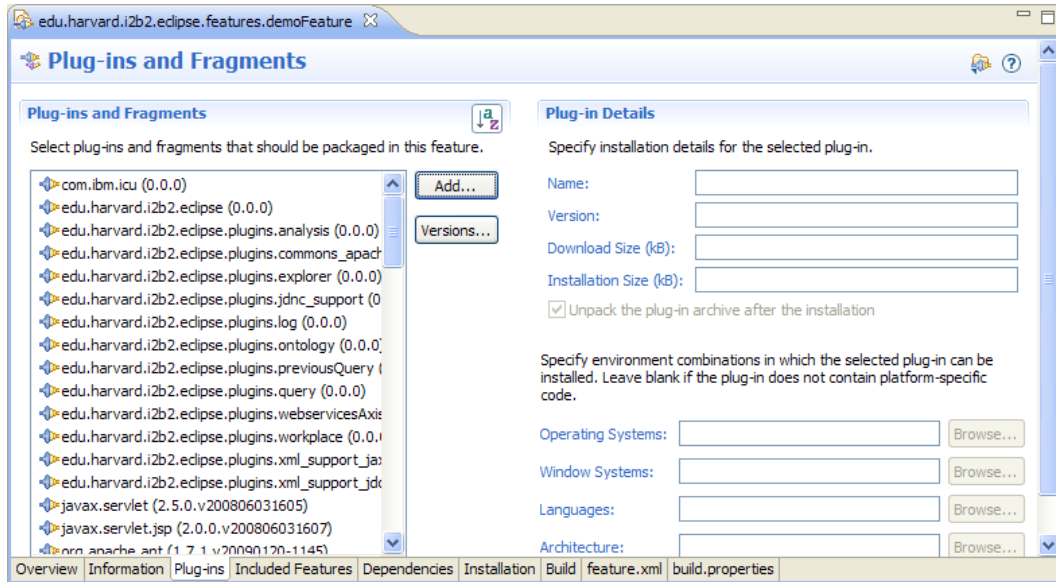
Name:

Add

Overview Information Plug-ins Included Features Dependencies Installation Build feature.xml build.properties

4.2.4 Plug-ins Tab

The plug-ins and fragments that are included in the feature are listed on the **Plug-ins and Fragments** page. The list is populated with those plug-ins selected when the feature was created.



4.2.4.1 ADDING AND REMOVING PLUG-INS AND FRAGMENTS

Add Plug-in/Fragment

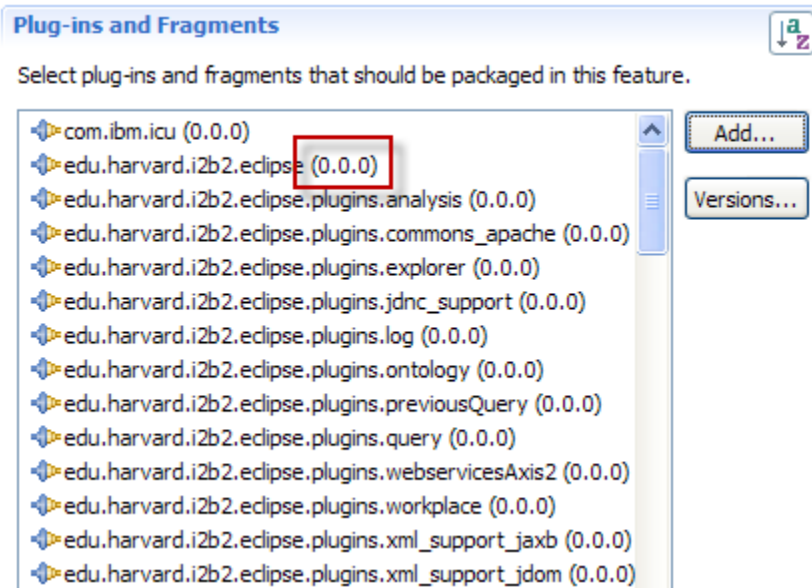
1. Click on the **Add** button and the **Plug-in Selection** dialog box will open.
2. Select the plug-in and/or fragment you want to add.
3. Click on the **OK** button.

Delete Plug-in/Fragment

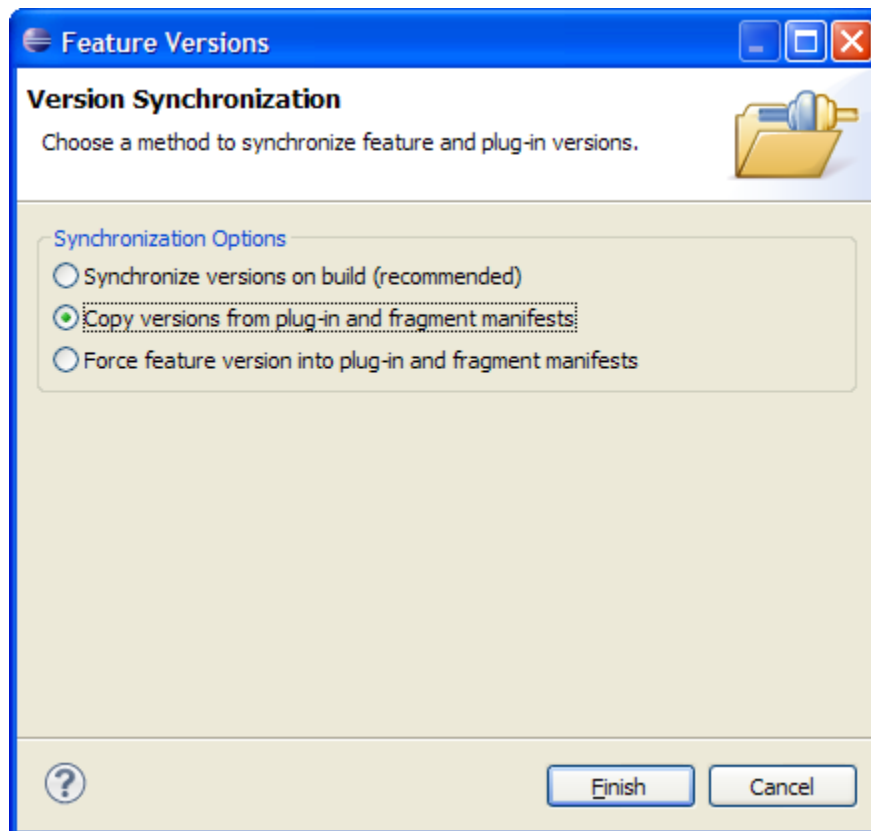
1. *Right click* on the name of the plug-in or fragment to be deleted.
2. Select **Delete** from the pop-up menu.

4.2.4.2 UPDATE VERSION OF PLUG-INS AND FRAGMENTS

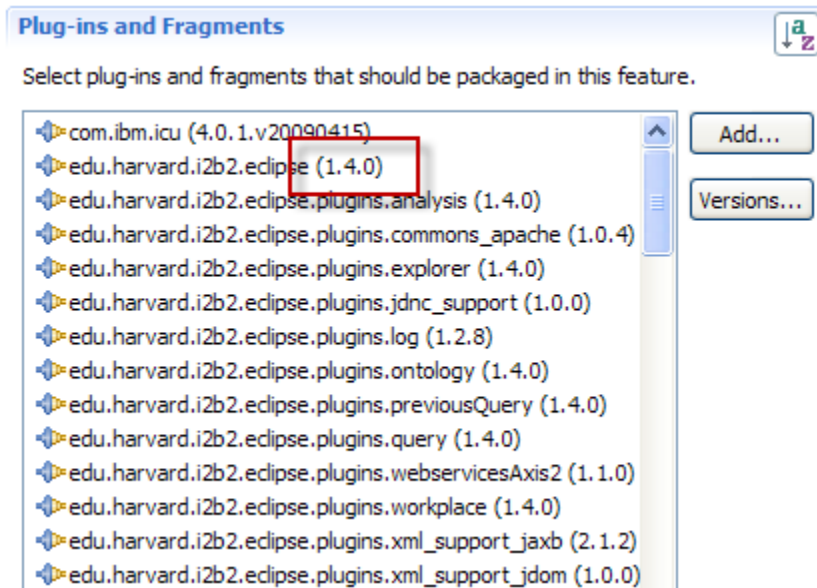
When the feature is first created the version of the plug-ins/fragments to be included is set to 0.0.0. Therefore, it is important that you update them to reflect the correct version information.



1. Select all the plug-ins/fragments in the list.
2. Click on the **Versions...** button.
3. The **Features Version** dialog box will open.



4. Select **Copy versions from plug-in and fragment manifests**.
5. Click on the **Finish** button.
6. Eclipse will update the plug-ins/fragments with the version information in the each of their respective manifests.



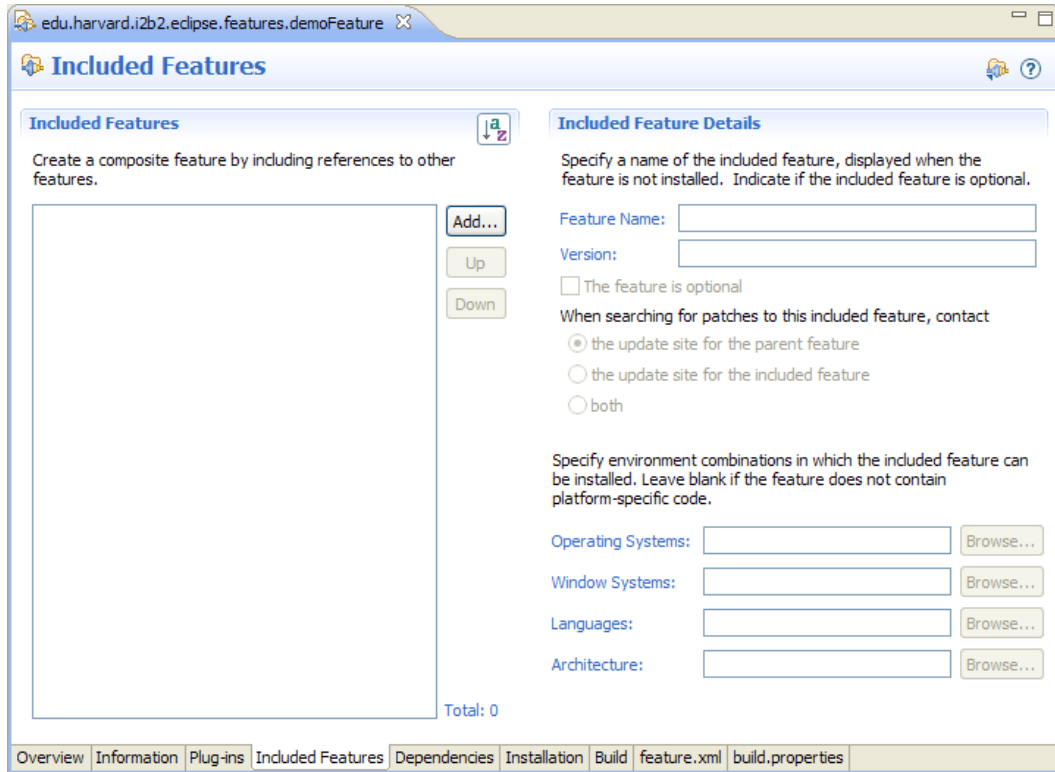
4.2.4.3 UPDATE PLUG-IN DETAILS

On the top right corner of the Plug-ins page is the **Plug-in Details** section. The information that appears is dependent upon which plug-in is highlighted in the list on the left of the page.

The *name* and *version* information defaults from the plug-in. You can add *download* and *installation* sizes as well as any *environment information* that is specific to the plug-in. All of this information is visible to the user when they are installing the feature from within the i2b2 Workbench.

4.2.5 Included Features Tab

A list of sub-features to be included with the feature is defined on the **Included Features** page.



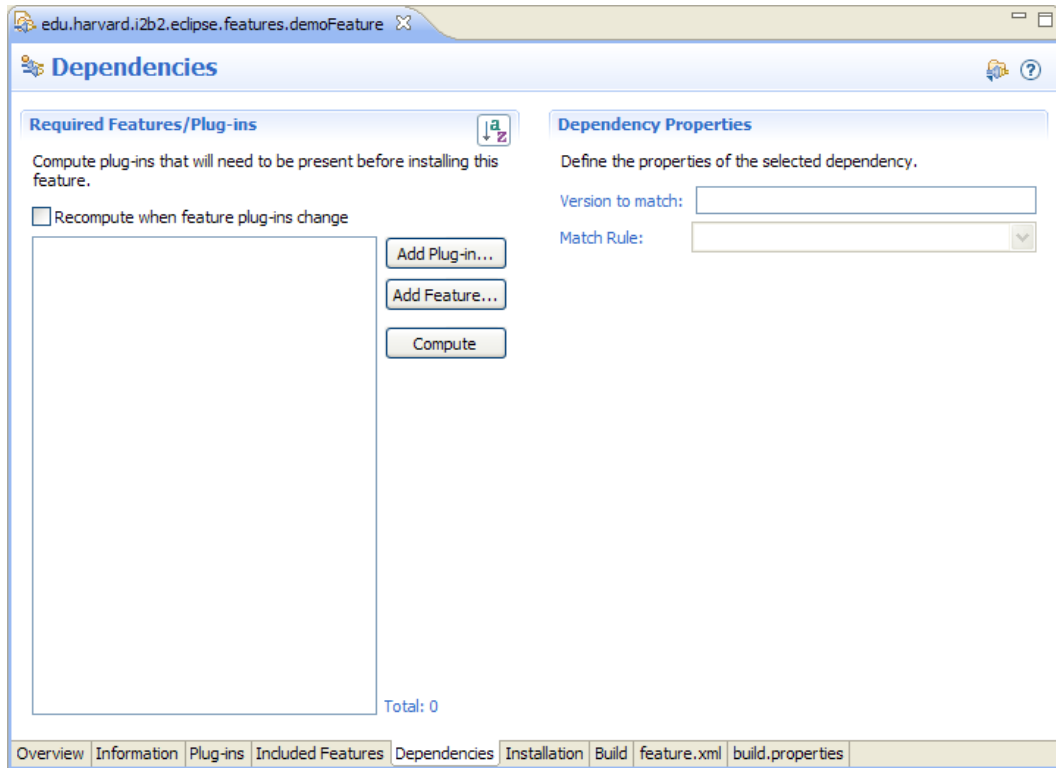
4.2.6 Dependencies Tab

All the plug-ins and other features that are required for the feature to work are listed on the **Dependencies** page. If an item on the list is missing then the feature will not load when the user tries to install it via the i2b2 Workbench.

! *The dependencies page is not populated when you first create the feature. Therefore, it is important that you add them before building and deploying it.*

There are two ways to add dependencies:

1. **Manually:** You select which plug-ins or features to include by clicking on the **Add Plug-in** or **Add Feature** buttons.
2. **Compute:** This method will populate the list of dependencies based on the requirements defined by the plug-ins listed on the Plug-ins page. Simply click on the **Compute** to update the list.



4.2.6.1 DEPENDENCY PROPERTIES

On the left side of the Dependencies page is a section called Dependency Properties. It is here that you can define a Version to match and Match Rule. The feature will not load if the version and the defined match criteria are not met.

4.2.7 Installation Tab

Information regarding the installation of the feature is entered on the Installation page.

edu.harvard.i2b2.eclipse.features.demoFeature

Installation Details

Installation Options

Specify feature installation requirements.

☐ This feature requires exclusive installation.

To colocate this feature with another feature, specify its ID.

Feature ID:

Feature Data

Select non-plug-in data archives that should be packaged in this feature.

Specify environment combinations in which the selected archive can be installed. Leave blank if the archive does not contain platform-specific code.

Operating Systems:

Window Systems:

Languages:

Architecture:

Install Handler

Specify an optional install handler that will be called during the installation.

Library:

Handler:

Data Archive Details

Specify size (in kB) for the non-plug-in data archives.

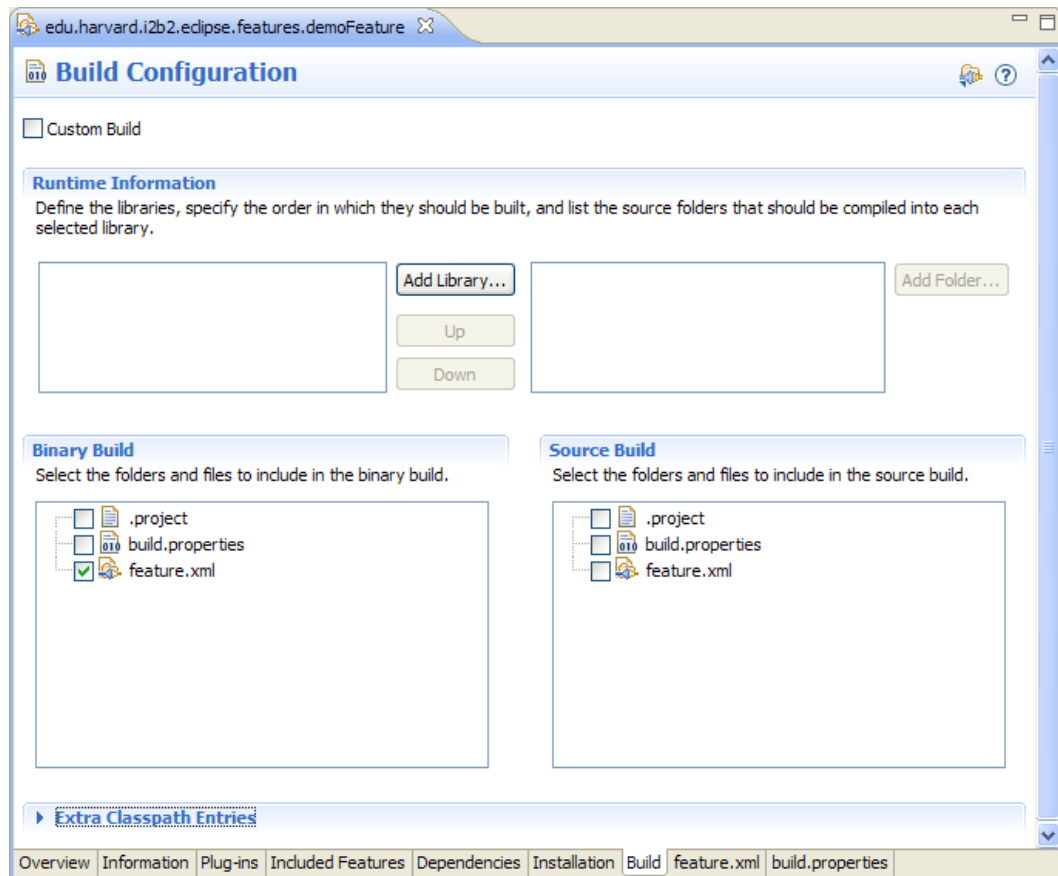
Download Size:

Installation Size:

Overview | Information | Plug-ins | Included Features | Dependencies | Installation | Build | feature.xml | build.properties

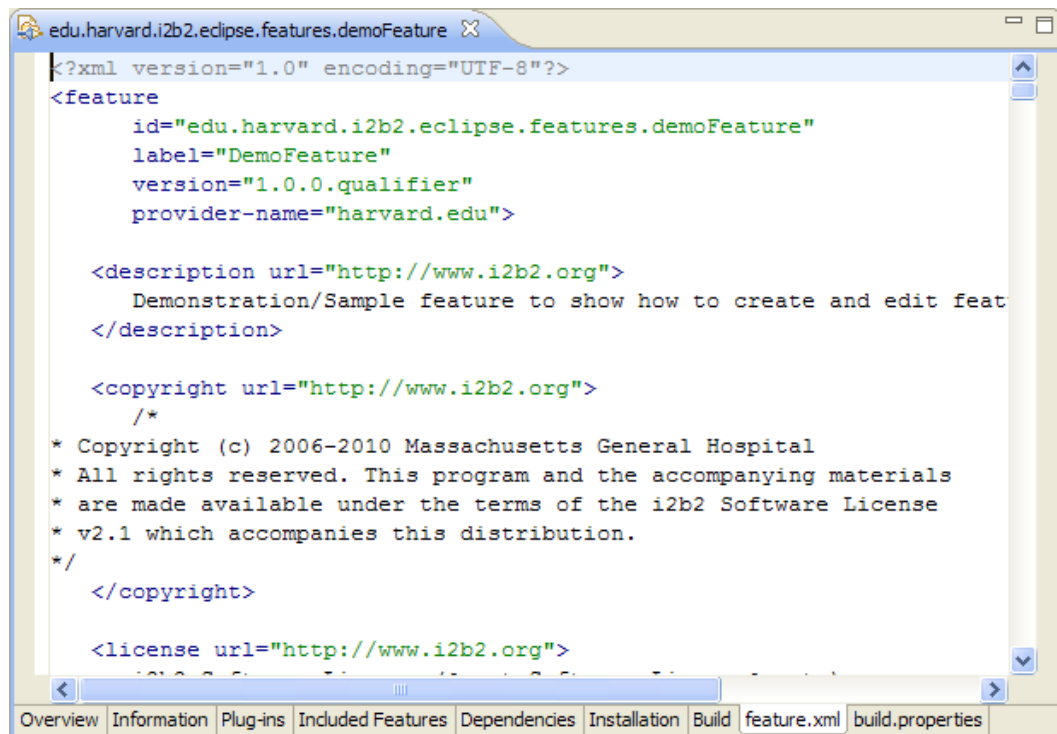
4.2.8 Build Tab

Information regarding the *libraries*, *folders* and *files* to include when building the feature are defined on the **Build Configuration** page.



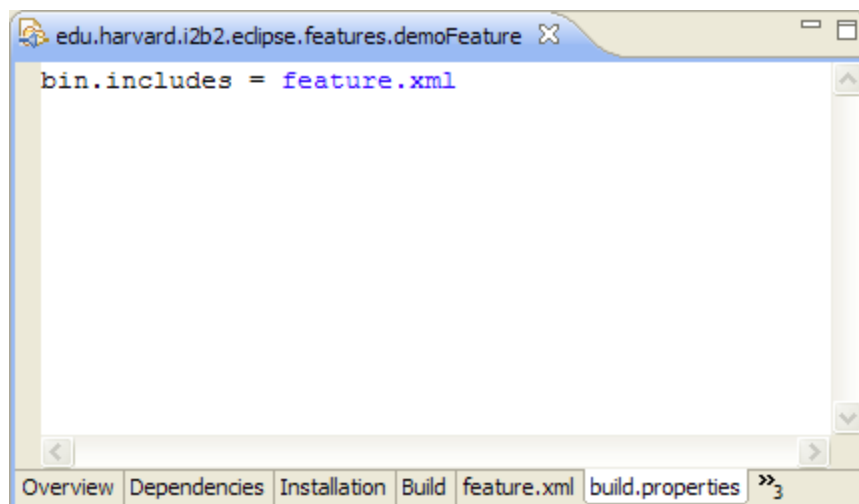
4.2.9 Feature.xml Tab

The **feature.xml** page is the XML for all the information defined on the other pages.



4.2.10 Build.properties Tab

The **build.properties** page is the properties file for the feature. The information that appears on this page correlates with what is defined on the **Build Configuration** page.



LICENSE

The i2b2 source code is licensed under the i2b2 Software License 2.1. This includes but is not limited to all code in the edu.harvard.i2b2.* package namespace.