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Overview

The **CM4D Upload Portal** is a web application which allows users in your group to submit data files for processing into a CM4D database. The main purpose of having a web based portal is to allow external sources, such as vendors or suppliers, to submit their data into your system for reporting and analysis without giving them access to your private network.

The upload portal uses DataSmith as a web-hosted service to achieve the same results that you would get using the DataSmith Batch desktop application.

Using CM4D Upload Portal

1. Login
2. Projects
 - a. Select a Project
 - b. View Upload History
 - c. Upload New Files
3. Upload File(s) - submit Data files to be processed by the DataSmith Batch service into the CM4D database.
 - a. Select Files
 - b. Preview Data File
 - c. Submit File to DataSmith Batch

User Access

Access to the CM4D Upload Portal is managed via ATS Security Manager and the DataSmith Batch jobs for processing the files are set up using ATS Configuration Manager.

Login

The CM4D Upload Portal users are managed with ATS Security Manager. To log in to CM4D Upload Portal:



1. Browse to your CM4D Upload Portal web page.
2. Enter your Username.
3. Enter your Password.
4. Optionally, click Remember Me to save your username for subsequent logins.
5. Click Sign In.

Forgot Password?

1. Click Forgot Password to reset your login password.
2. Enter your user name.
3. Click Send.
4. An email with a password reset link will be sent to your authentication email address.
5. Open the email and click the password reset link.
6. Once you are redirected to the Reset Password form:
 - a. Provide a new password.
 - b. Confirm the new password.
 - c. Click Reset.
7. Once the password has been changed successfully, click Log In to return to the main Login page.



User Options

Click the  user@name in the top right corner of the screen to see all user options. Click () to close the card.

Themes

Two themes are available in CM4D Upload Portal: Dark and Light.

To change the theme:

1. Click Themes on the user options menu.
2. Select the theme.

The new theme is loaded immediately and stored for subsequent sessions.

Change Language

The interface language can be changed from the default English. Available languages are configured by a system administrator.

To change the language:

1. Click Change Language on the user options menu.
2. Select a language from the dropdown menu.

The new language is loaded and stored for subsequent sessions.

Change Password

If configuration allows, users may be able to change their own password.

To change your password:

1. Click Change Password on the user options menu.

The Change Password form loads with your user name pre-filled.

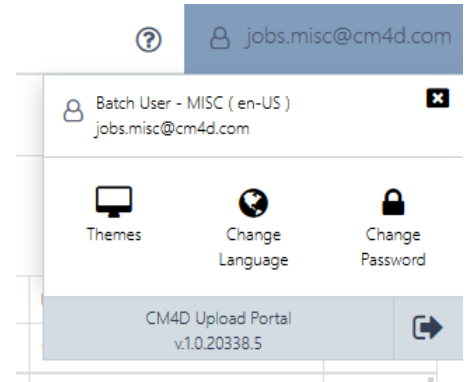
2. Enter the current password.
3. Enter the new password.
4. Enter the new password again to confirm.
5. Click Change.

After successful password change the Password change confirmation screen appears with a Log in link.

6. Click the Log in link.

Logout

Click to log out of CM4D Upload Portal.





Projects

My Projects

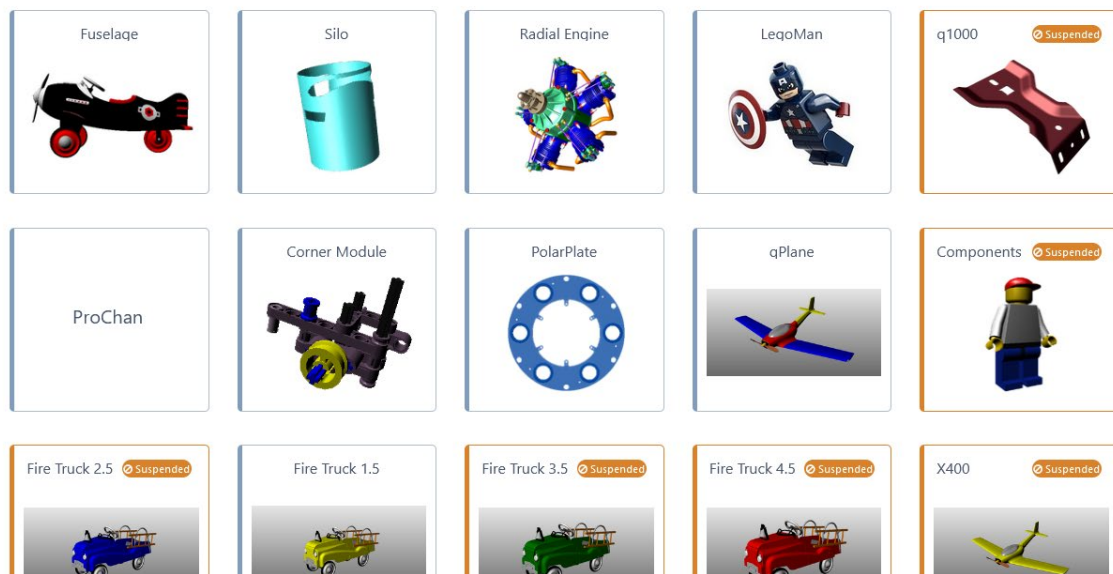
The main landing page of CM4D Upload Portal is the Project page. Available Projects are shown in tiles with either a title or a title and image to identify the project. Individual project availability is dependent on the logged in users' assigned role in ATS Security Manager.



My projects

[View history](#)

[Upload new files](#)



Select a Project

Click on a tile to select the project. Once selected, the tile border turns green and a check appears in the upper right corner. Once a project is selected, choose one of two actions:

1. **Upload New Files** - add one or more files for submission to the CM4D database
2. **View History** - see the list of previously submitted files



My projects

[View history](#)

[Upload new files](#)





View History

Each Project tracks the files that have been uploaded by users. The columns can be searched and sorted. New files can be uploaded directly using the New button, rather than returning to the main project page.

See page 12 for more information.

Upload New Files





Once a Project is selected, select the data files to be uploaded. One or more files can be added for upload and processing into the CM4D database. Once a file is added, it will be run through a preliminary validation against the DataSmith Translator.

- Files with an invalid format cannot be previewed or submitted.
- Valid data files can be submitted for processing to DataSmith Batch service into the CM4D database.

See page 7 for more information.

Projects - Status

The project tile appearance indicates the status of a project. All projects for which you have permissions to access have a tile on the main landing page. Some conditions may effect what can be done with a project if you can upload a file immediately or if there may be temporary access restrictions.

-  **Available** - view upload history, upload files for active processing
-  **Selected** - project is selected for the next action
-  **Suspended** - view upload history, upload files for later processing
-  **Unavailable** - view upload history

Available Projects

Available projects are not marked with a specific flag. Rather, if a tile is the default color and does not have a flag in the upper right corner, it is active and can be selected for uploading files.



Selected Project

When a project is actively selected, the tile border turns green and a check appears in the upper right corner.

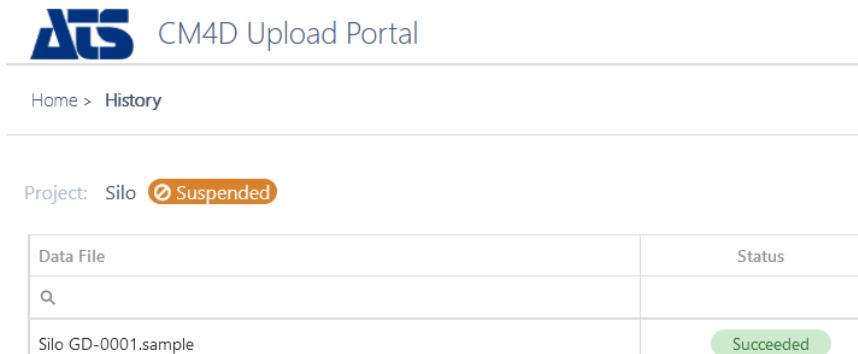


Suspended Projects

Projects marked with the 'Suspended' flag are not actively processing data files. Suspended projects can still receive submitted data files, but the files are not processed until the job is reactivated in DataSmith Batch Manager by a CM4D administrator.

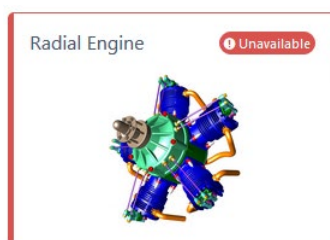


You can also view the history of a suspended project. The 'Suspended' flag is displayed with the project name.



Unavailable Projects

Projects marked with the 'Unavailable' flag indicate a connection issue with the DataSmith Batch server that is assigned to process the files for the project. This may indicate either a problem with your connection to the network servers or an issue with the service that handles the files on the server end. The history may be viewed, but files cannot be unloaded until the project is no longer unavailable.





Upload Data Files

Once a Project is selected, select the data files to be uploaded. One or more files can be added for upload and processing into the CM4D database. Once a file is added, it will be run through a preliminary validation against the DataSmith Translator.

- Files with an invalid format cannot be previewed or submitted.
- Valid data files can be submitted for processing to DataSmith Batch service into the CM4D database.

Select Data Files

Add Files

Files are added individually or in batches to the selected project by either browsing to the file(s) or dropping files from the file explorer onto the indicated area in the web browser. Once you have selected the files to upload, the file(s) can be submitted to the database.


When at least one file has been selected, you have two action options:

- **Preview Data** - view a grid to see what data is identified for processing
- **Submit to DataSmith Batch** - send the data file to be processed into the CM4D database

Home > Upload data files

Project: LegoMan Preview data Submit to DataSmith Batch

Supported files: .txt, .rtxt, .xml



Browse your files
or drag and drop them here

Legoman S000001.xml	14.02 kb	Format validated	✕
Legoman S000002.xml	14.02 kb	Format validated	✕

Virus Detection

If a selected file contains a virus, a notification will alert you and the file will not be permitted for uploading.





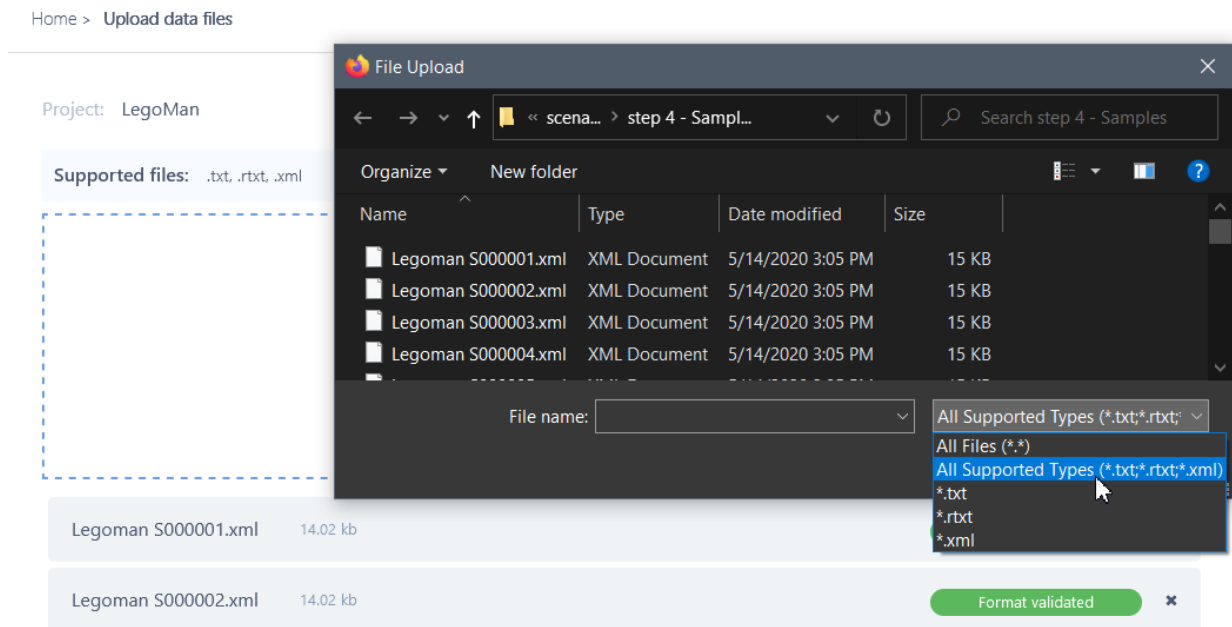
Remove Files

Click the **X** on the right side of the file row to remove it from the upload list.

Navigating to a different page (home, or back) without submitting any selected files will remove these files from the upload list without submitting the files for processing. A prompt allows you to confirm or cancel the file removal.

Supported Files

Some projects only allow files with specific extensions to be uploaded. If the project has such restrictions, the list of supported file extensions is displayed below the project name. The file browser will automatically default to the supported file extensions.



If an unsupported file extension is selected, an error will appear and the file will not be added to the upload list. Allowed file extensions are configured as part of the project properties and cannot be changed via Upload Portal.

Format Validation

When a file is added, it is automatically scanned for an initial validation against the DataSmith translator. If the data file meets the requirements specified in the translator it is considered valid for upload.

- **Format Validated** - The file meets the requirements specified in the DataSmith translator and can be submitted for processing.
- **Invalid Format** - The file does not meet the requirements specified in the DataSmith translator and cannot be submitted for processing.




Home > Upload data files

Project: DataMyte

Preview data

Submit to DataSmith Batch

Supported files: .dat



[Browse your files](#)
or drag and drop them here

DataMyte Data.dat	24.86 kb	Format validated ✕
Non DataMyte Data.dat	22.89 kb	Invalid format ✕

Preview Data

The **Preview Data** option runs a pre-check on the selected file(s) to show what data will be extracted. This allows you to check that the file format is correct for the selected project before committing the upload. The grid contains a column for each unit of data that is configured for the project to extract from the data file. Each row in a column represents expected data values for the selected project.

Project: Legoman

Configuration: Samples

Submit

Feature	DataSource	Routine	Sample	Date Time	Operator	Supplier	Results Rule	GenData	Feature Label	Dev
MEASDATAITEM		Legoman	S000001	2018-10-01 00:00:00	Lena	Acme	Toleranced	GenSeed	AR-122-L	0.297000
MEASDATAITEM		Legoman	S000001	2018-10-01 00:00:00	Lena	Acme	Toleranced	GenSeed	AR-122-R	0.688000
MEASDATAITEM		Legoman	S000001	2018-10-01 00:00:00	Lena	Acme	Toleranced	GenSeed	AR-126-L	-0.642000
MEASDATAITEM		Legoman	S000001	2018-10-01 00:00:00	Lena	Acme	Toleranced	GenSeed	AR-126-R	-0.242000
MEASDATAITEM		Legoman	S000001	2018-10-01 00:00:00	Lena	Acme	Toleranced	GenSeed	AR-127-L	0.524000

If the grid is empty, confirm that you have the correct project selected and have uploaded the right file type for the project.

Notice
External Preprocessors used in the DataSmith Translator are not reflected in the Upload Portal Preview.

Lost Grid Data

If you leave the preview page without submitting the data, a warning will appear to confirm if you want to continue and lose the data.



Project

The Project title shows the label of the project that is selected for the upload. If a project is suspended, the flag will appear here also.

Home > Upload data files

Project: Components Suspended

Supported files: all file types

Configuration

The Configuration title shows the label of the Config from the DataSmith document used to translate the data file. If more than one Config is enabled for the project, select the label from the dropdown to see the data previewed for a different configuration.

Configuration selection here is only for grid population in the preview; the dropdown selection here does not impact how the data file is processed.

Configuration 1 - Data

Project: Silo-Gen Configuration:

Feature	Routine	Seq	Tag 1
Result	Silo	GD-0001	2016-05-03 09:00:30
Result	Silo	GD-0001	2016-05-03 09:00:30
Result	Silo	GD-0001	2016-05-03 09:00:30

Configuration 2 - No Data

Project: Silo-Gen Configuration:

Feature



Preview Color Codes

Cells are color-coded according to the results of the preprocessing:

COLOR	STATUS	DESCRIPTION
Green	Successful	The unit of data is successfully identified for the project.
Yellow	Questionable	A unit of data is expected, but is either missing or in an unexpected format. Yellow fields may still be valid, depending on the data file.
Blue	No Data	The unit of data will not be processed.
Red	Failed Validation	The unit of data did not pass validation conditions.

Submit Data

Submitting the selected file(s) sends the data to the DataSmith Batch service for processing. Once you have submitted a file, processing cannot be cancelled from CM4D Upload Portal. Check the Upload History to monitor the status.



View History

Each Project tracks the history of all files that have been uploaded. The history displayed is dependent on the security role of the logged in user. The columns of the grid can be searched and sorted.

- **New** - returns to the My Projects page
- **Refresh** - initiates a page refresh

Home > History

Project: Silo
Refresh
+ New

Data File	Status	Uploaded At	Uploaded By	Actions
Q		Q	Q	
Silo GD-00042.sample	Submitted	12 Dec 2020 07:55 AM	jobs.misc@cm4d.com	
Silo GD-00004.sample	Processing	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com	
Silo GD-00001.sample	Processing	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com	
Silo GD-00002.sample	Processing	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com	
Silo GD-00003.sample	Processing	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com	
Silo GD-00005.sample	Processing	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com	
Silo GD-00010.sample	Processing	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com	
Silo GD-00011.sample	Processing	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com	
FT 1.5 Body 110 GD-00100[100].sample	Failed	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com	⋮
Silo GD-000003.sample	Succeeded	08 Dec 2020 12:16 PM	jobs.misc@cm4d.com	⋮
Silo GD-000004.sample	Succeeded	08 Dec 2020 12:16 PM	jobs.misc@cm4d.com	⋮
Silo GD-000005.sample	Succeeded	08 Dec 2020 12:16 PM	jobs.misc@cm4d.com	⋮

Actions Click the three dots (⋮) to open the menu of available actions for the selected row.

- **Download Error File** - downloads the error file generated for the failed data file to the local system.
- **Download File** - downloads the original data file to the local system.
- **Re-submit** - Sends the file back to processing.

Data File The name of the uploaded file, including the file extension.

Status Indicates the result of the upload (submitted, processing, failed, succeeded).

Uploaded At The date and time the file was uploaded. The timestamp is stored in UTC (Coordinated Universal Time) so it is displayed using a localized date/time.

Uploaded By The user that uploaded the file. Some users will only see their own uploads, whereas others may have access to see all the users that uploaded files to a project.

History - Actions

The actions menu (⋮) provides dynamic options available for the selected row. For example, files with a status 'Failed' have an additional option to download the associated error file from the system.



Silo GD-00011.sample	Processing	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com
FT 1.5 Body 110 GD-00100[100].sample	Failed	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com
Silo GD-000003.sample	Succeeded	08 Dec 2020 12:16 PM	jobs.misc@cm4d.com
Silo GD-000004.sample	Succeeded	08 Dec 2020 12:16 PM	jobs.misc@cm4d.com

Download File

Download the data file to your local system. The file is downloaded with the same name and contents as the originally submitted file.

Download Error File

When a file upload fails to process, a log file is generated with error messages relating to the failure. Download the error log file to your local system.

Resubmit File

An uploaded file can be resubmitted for processing without going through the regular upload process. This may need to be done in cases where a file fails to upload for one reason or another, and the file needs to be resubmitted once the issue causing the original failure has been resolved. If you have View All permissions on a project, you could also resubmit a file that was originally uploaded by another user.

History - Status

The state of the file is automatically updated to reflect where it is in the process.

COLOR	STATUS	DESCRIPTION
Blue	Submitted	The file has been uploaded to the server to be picked up for processing into the database. A file may remain in this state for a long period of time depending on the state of the CM4D processing system. For example, if the project has been suspended temporarily, the services are stopped or there is a large queue of files waiting for processing.
Yellow	Processing	The file is in the process of being read and translated before it is entered into the database.
	Retry...	The file is on hold due to a connectivity issue. The system may be attempting to reconnect a number of times. The Retry options are: <ul style="list-style-type: none"> Retry Database - File submitted to the Inbox cannot reach the Processing folder. Retry Errorbox - File that failed to process cannot reach the Errorbox folder. Retry Outbox - File that processed successfully but cannot reach the Outbox folder.
Red	Failed	The file failed to upload to the database. This can be for several reasons, such as an incompatible format or insufficient access to the database.
Green	Succeeded	The file has been uploaded to the project successfully.



History - Uploaded By

The username is displayed in the Uploaded By column of the history grid. Depending on security roles, some users will only see their own uploads, whereas others may have access to see all the users that uploaded files to a project. There are two levels for each project:

- **View Own** - You can see the history only for files that have been uploaded with your user login. Other users can only see your upload history if they have the View All security role for the same project.
- **View All** - You can see the history for all users that have uploaded files for the selected project. This field may be useful for filtering or sorting the history grid if you are only interested in a particular user, including your own upload history.

Data File	Status	Uploaded At	Uploaded By	Actions
<input type="text" value=""/>		<input type="text" value=""/>	<input type="text" value=""/>	
Silo GD-0005.sample	Succeeded	08 Dec 2020 10:13 AM	dsadmin@comp	⋮
Silo GD-00042.sample	Succeeded	12 Dec 2020 07:55 AM	jobs.misc@cm4	⋮
Silo GD-0004.sample	Succeeded	08 Dec 2020 10:13 AM	dsadmin@comp	⋮
Silo GD-0003.sample	Succeeded	08 Dec 2020 10:13 AM	dsadmin@comp	⋮
Silo GD-0002.sample	Succeeded	08 Dec 2020 10:13 AM	dsadmin@comp	⋮
Silo GD-00011.sample	Succeeded	12 Dec 2020 07:52 AM	jobs.misc@cm4	⋮
Silo GD-00010.sample	Succeeded	12 Dec 2020 07:52 AM	jobs.misc@cm4	⋮
Silo GD-0001.sample	Succeeded	08 Dec 2020 10:13 AM	dsadmin@comp	⋮
Silo GD-00005.sample	Succeeded	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com	⋮
Silo GD-00004.sample	Succeeded	12 Dec 2020 07:52 AM	jobs.misc@cm4d.com	⋮

Select All

dsadmin@company.com

jobs.misc@cm4d.com

OK Cancel