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CM4D Configuration Module

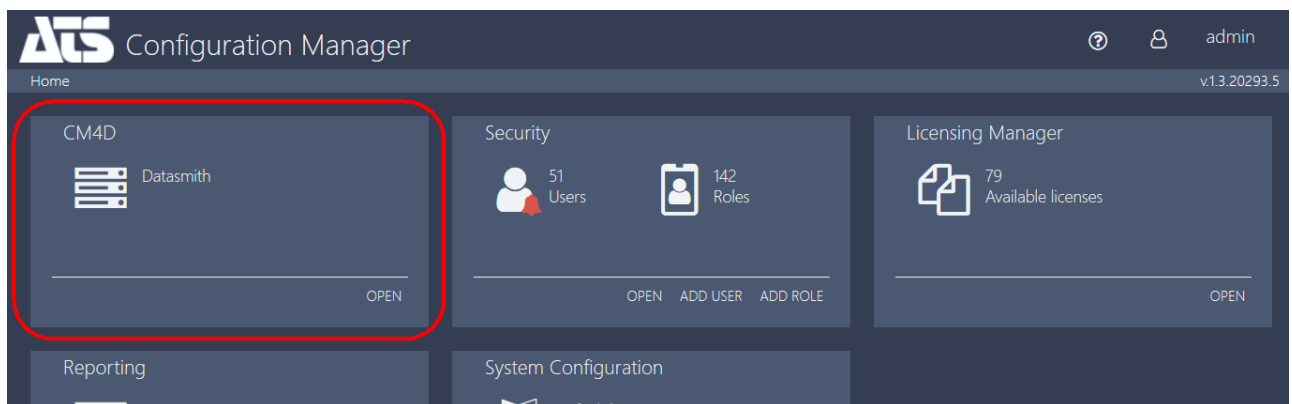
The **CM4D Configuration** module in ATS Security and Configuration Manager is the configuration tool used to connect to the DataSmith Batch services and enable Batch jobs on the Upload Portal.

Following installation of the required components, log in to the Security Manager and open the CM4D Configuration card.



Tip

The CM4D module card may not appear on the ATS Configuration Manager home page if your user login has not been granted the rights to administrate this module. If you know your login has been assigned a role with rights to CM4D, try logging off and then back in to refresh the application.

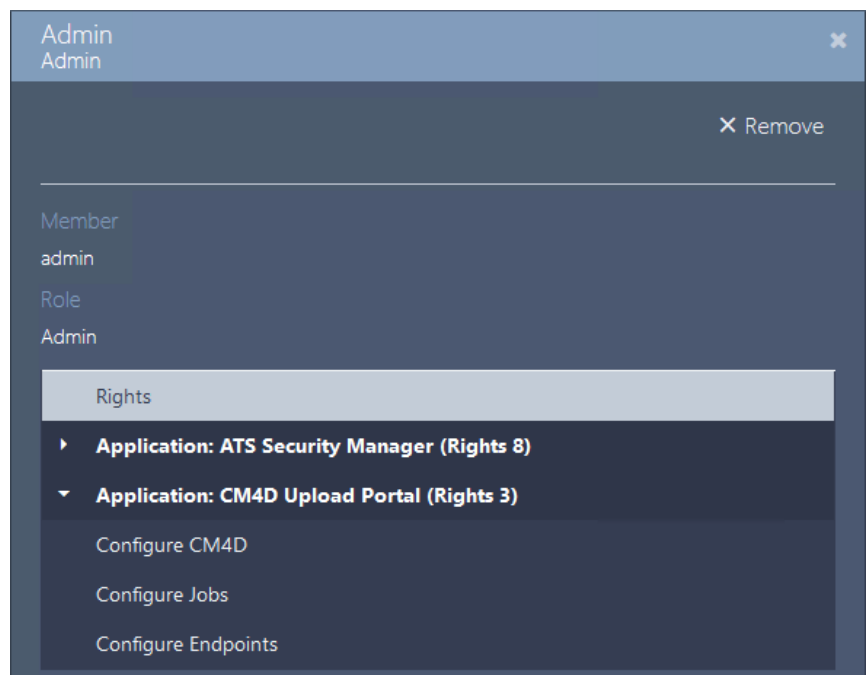


User Access

CM4D Configuration Module Admins

If the installation of CM4D Upload Portal was successful, the status of the registered application in ATS Security Manager should be '**Configuration Uploaded**'. This means that the CM4D Upload Portal application rights are uploaded in ATS Security Manager and can be assigned to security roles and administrators can begin to assign Upload Portal project roles to users.

- Configure CM4D - Access the CM4D Configuration module.
- Configure Jobs - Edit the DataSmith tab.
- Configure Endpoints - Edit the Settings tab.





Upload Portal Users

Upload Portal users must have a User login with Roles assigned with access to specific projects. Users can be granted access on two levels for each project:

1. **Own Projects** - User can upload files to the project and view their own upload history. No other user information is viewable.
2. **All Projects** - User can upload files to the project and view the complete upload history of a project, including other user uploads to the same project.

Upload Portal Services

The CM4D Upload Portal utilizes four Windows services.

1. ATS CM4D API
2. ATS CM4D DataSmith Batch Proxy
3. ATS CM4D DataSmith Translator
4. ATS CM4D Upload Portal

These services do not have any special user log on requirements. The only dependency is ATS Configuration Manager and ATS Security Manager.

	Service Name	Description	Status	Startup Type	Log On
	AppX Deployment Service (AppXSvc)	Provides inf...		Manual	Local System
1.	ATS CM4D API	ATS CM4D ...	Running	Automatic	Local System
	ATS CM4D DataConnect	Communic...		Manual	.\Administrator
	ATS CM4D DataSmith Batch	Monitors fo...	Running	Manual	.\Administrator
2.	ATS CM4D Datasmith Batch Proxy	ATS CM4D ...	Running	Automatic	Local System
3.	ATS CM4D Datasmith Translator Service	Translates o...	Running	Automatic	Local System
	ATS CM4D EventSmith SMTP	Notification...		Manual	.\Administrator
	ATS CM4D Results Launcher	Launches a...		Manual	.\Administrator
	ATS CM4D Results Loader	Communic...		Manual	.\Administrator
	ATS CM4D Results Service	Communic...		Manual	.\Administrator
	ATS CM4D Scheduler Launcher	Launches a...		Manual	.\Administrator
	ATS CM4D Scheduler Service	Handles the...		Manual	.\Administrator
4.	ATS CM4D Upload Portal	ATS CM4D ...	Running	Automatic	Local System
	ATS Configuration Manager service	Configurati...	Running	Automatic	Local System
	ATS Licensing Server	Handles req...	Running	Automatic	Local System
	ATS Security Manager Service	Security ma...	Running	Automatic	Local System
	Background Intelligent Transfer Service	Transfers fil...		Manual	Local System



CM4D User Roles

There are two levels of user rights for the CM4D module:

1. **CM4D Module Admins** - users that can log into ATS Security and Configuration Manager and make changes to the CM4D Configuration module, as relates to the CM4D Upload Portal.
2. **CM4D Upload Portal Users** - users that log in to the CM4D Upload Portal and access projects to upload data files for DataSmith Batch.

CM4D rights can be assigned to an existing Role or a new one may be created if your specific configuration determines a different role than the roles set up for other ATS modules.

CM4D Configuration Module Admins

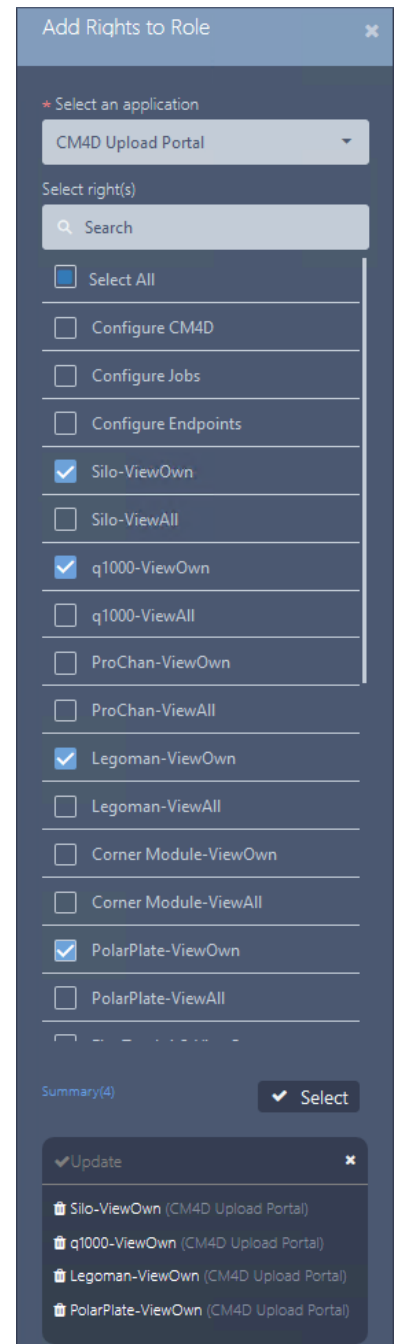
If the installation of CM4D Upload Portal was successful, the status of the registered application in ATS Security Manager should be '**Configuration Uploaded**'. This means that the CM4D Upload Portal application rights are uploaded in ATS Security Manager and can be assigned to security roles and administrators can begin to assign Upload Portal project roles to users.

- **Configure CM4D** - Access the CM4D Configuration module.
- **Configure Jobs** - Edit the DataSmith tab.
- **Configure Endpoints** - Edit the Settings tab.

Upload Portal Users

CM4D Upload Portal users must have a User login with Roles assigned with access to specific projects. Users can be granted access on two levels for each project:

1. [ProjectName]-**ViewOwn** - User can upload files to the project and view their own upload history. No other user information is viewable.
2. [ProjectName]-**ViewAll** - User can upload files to the project and view the complete upload history of a project, including other user uploads to the same project.



Tip

If you have not set up DataSmith Batch already, consider doing this before attempting to set up user Roles for Upload Portal users. Since each Batch job (Project) has its own Rights, projects rights can only be added to a role after the Batch server is connected and jobs are set up in DataSmith Batch Manager.

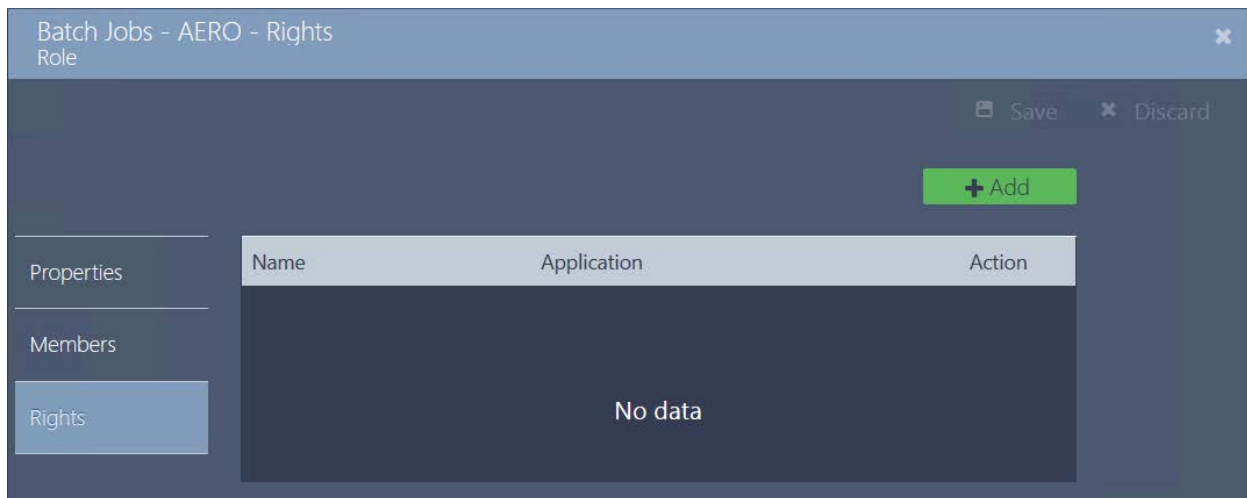


Add Rights to a Role

Each DataSmith Job has two corresponding security Rights that must be granted to a Role for users to be able to see the project in their Upload Portal. For example, a Job/Project with the label 'Silo' has the associated rights labelled '*Silo-ViewOwn*' and '*Silo-ViewAll*'.

Complete the following steps for each Role that requires Upload Portal Project rights:


1. Click on a role in the Roles grid card to open its properties.
2. In the role properties, click on the Rights tab.
 - a. Click Add.

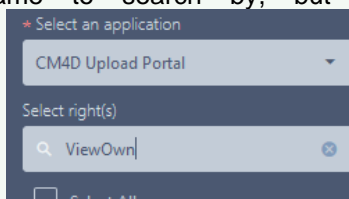


- b. Select CM4D Upload Portal from the dropdown.



- c. Check boxes for the projects you want to add for the role, either *ViewOwn* or *ViewAll* for each project.

 Type "ViewOwn" or "ViewAll" in the Search field to reduce the list to the relevant options based on rights. This is helpful in a system with a long list of jobs/projects where you may not know the project name to search by, but you do know which type of rights you want to select.



- d. Click Select.
3. Click Save.



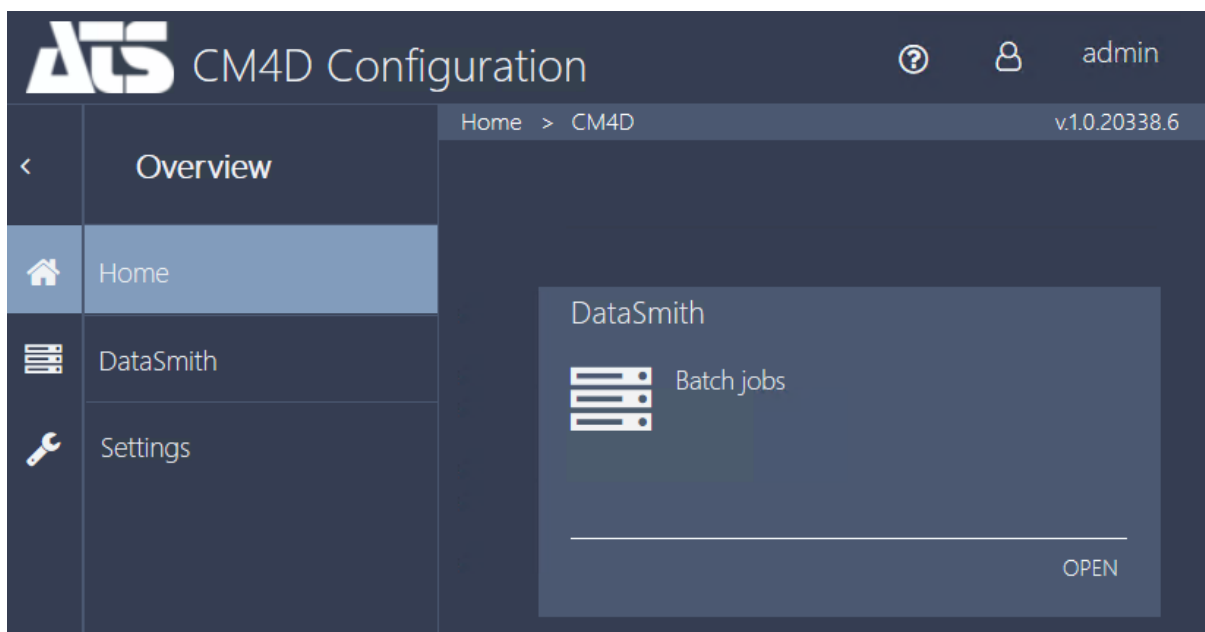
CM4D Configuration

The **CM4D Configuration** module in ATS Security and Configuration Manager is the configuration tool used to connect to the DataSmith Batch services and enable Batch jobs on the Upload Portal.

Home

The **Home** tab contains the following cards:

- **DataSmith - Batch Jobs** - Click on the card or click Open to go to the DataSmith tab which contains all available DataSmith Batch jobs from the servers connected via service endpoints (defined in the Settings tab).



CM4D DataSmith

The **DataSmith** tab contains all available Batch jobs from the servers connected via endpoints defined in the Settings. Batch jobs appear in a grid card with one row per job for each server.

Each job listed has two corresponding security Rights that must be granted to a Role for users to be able to see the project in their Upload Portal.

Notice

The CM4D plugin detects jobs based on the Job Label in DataSmith Batch Manager, so if a job label is changed in Batch Manager then the job in Configuration Manager must be reconfigured for the Upload Portal as if it were a completely new job.



Endpoint	Job label	Upload project	Status	Actions
DSBatch CM4D Server 24	Fuselage		Active	
DSBatch CM4D Server 24	Fire Truck	Fire Truck	Active	
DSBatch CM4D Server 24	Silo	Silo	Active	
DSBatch CM4D Server 24	DB1		Suspended	
DSBatch CM4D Server 24	Radial Engine		Active	
DSBatch CM4D Server 24	Legoman	Legoman	Active	
DSBatch CM4D Server 24	q1000	q1000	Active	
DSBatch CM4D Server 24	ProChan	ProChan	Active	
DSBatch CM4D Server 24	Bubbles		Active	
DSBatch CM4D Server 24	Corner Module	Corner Module	Active	

- Actions** Click the three dots to open the menu of available actions for the selected row.
 - Open** - Opens the Job Properties tabbed blade for the selected job row.
- Endpoint** The label of the DataSmith Batch Proxy service endpoint that runs the DataSmith Batch service and stores the Batch folders and files.
- Job Label** The label of the Batch job, as it is defined in DataSmith Batch Manager.

! If a Job Label is changed in DataSmith Batch Manager, any upload portal settings and permissions for the job in Configuration Manager will no longer be associated to that batch job.
- Status** The current state of the job - active or suspended. Suspended jobs that are enabled on the Portal can still receive submitted data files, but the files are not processed (marked as 'Submitted') until the job is set to Active in DataSmith Batch Manager. Suspended project files are marked with the 'Suspended' flag to alert users to the current status of the job.
- Upload Project** The label of the Upload Portal project. This is what the users see on the project card.

Job Properties

The Job Properties tabbed blade contains read-only information about the DataSmith Batch job.

Job Properties	Endpoint	Batch folder
Upload Portal	DSBatch CM4D Server 24	C:\CM4D_DSBatch\MISC\Silo\
	Job label	Inbox
	Silo	Inbox\
	Status	Outbox
	Active	OutBox\
	Tag	DS document
	MsAlaineous	C:\Usage Scenarios\division - MsAlaineous\scenario - Silo\step 5
	Maximum number of files	Include Specs
	20	*.*
	Timestamp format	Exclude Specs
	Append to extension	

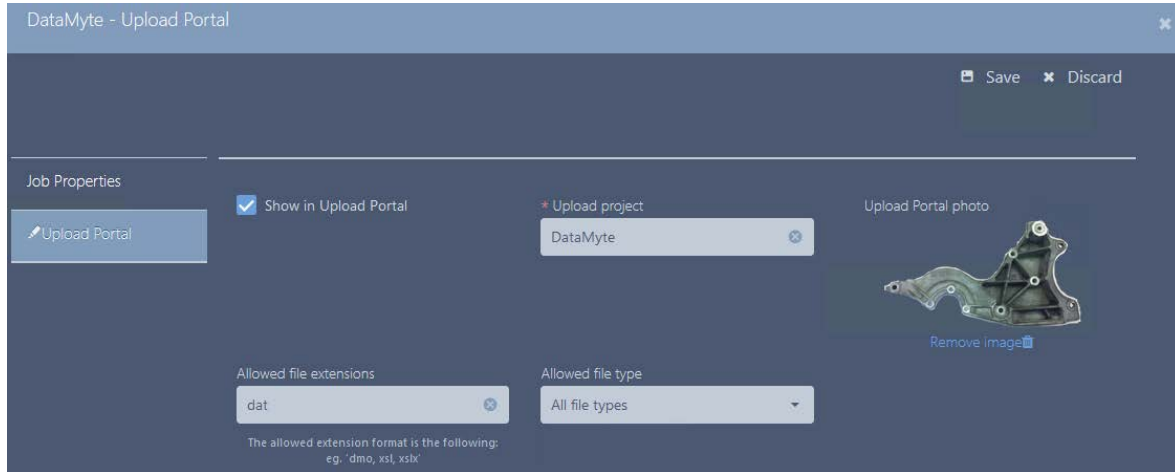


Batch Folder	The Batch Folder is the central hub of the Batch Processor, and <u>must be on a local drive</u> on the system where the DS Batch service is running. This is the main folder where the Batch service creates the Inbox, Out Box, and Error Box when those respective folder paths are set to relative paths.
DS Document Endpoint	Enter the local (or UNC) path in the field or Browse to the DataSmith file (*.4datasmith) that will be used to translate your data files.
Exclude Specs	Batch retrieves the entire contents of the Inbox (as specified by the *.* wildcard parameters unless you specify which file types you want to retrieve. To retrieve all files <u>except</u> those with a specific file extension, type the file extension between the two wildcard symbols (*.*). The Exclude field is a semicolon delimited list and is <u>not</u> case sensitive. Exclude is also defined as an OR operation (<i>not</i> AND), meaning that a file only has to match one of the specs to be excluded.
Inbox	The Inbox folder is the first destination for all data files that will be processed by DataSmith Batch. The Batch Processor will retrieve data from the folder designated as the Inbox and transfer it to the Processing folder to be processed. The Batch Inbox is defined as a relative folder by default, but can be assigned any user-defined directory (local or UNC path).
Include Specs	Batch retrieves the entire contents of the Inbox (as specified by the *.* wildcard parameters) unless you specify which file types you want to retrieve. To retrieve <u>only</u> files with a specific file extension, type the file extension between the two wildcard symbols (*.*). The Include field is a semicolon delimited list and is <u>not</u> case sensitive. Include is also defined as an OR operation (<i>not</i> AND), meaning that a file only has to match one of the specs to be included.
Job Label	The name of the Batch job.
Maximum Number of Files	Max Files refers to the maximum number of data files you wish to process at one time from one Inbox. This number is per DataSmith process, as set in the Concurrent DataSmith Processes section of Batch Manager.
Outbox	The Outbox folder contains a copy of all the files that DataSmith Batch successfully processed and marked with a date/time stamp. The Batch Out Box is defined as a relative folder by default, but can be assigned any user-defined directory (local or UNC path).
Status	The Job Status is the traffic signal, so to speak, for the DataSmith Batch processor. <ul style="list-style-type: none">• Active - DataSmithBatch will process data files for the selected job.• Suspended - All processing is stopped for the job. DataSmith Batch will not actively check the Inbox for files. An active job that is currently processing data when it is suspended will resume processing when the job is reactivated. Data files submitted for a project that is suspended in Batch Manager will remain with the status of 'Submitted' in a users' upload history until the job is reset to Active.
Tag	A Tag is a user-defined text string that can be used for sorting, grouping or identifying jobs.
Timestamp Format	When a file is passed from the Inbox to the Processing folder, DataSmith Batch will apply the date/time stamp and a new file extension to the data file as specified in the Timestamp Format section of the Batch Manager. If you use one timestamp format, then decide you wish to use another, the old time stamp will not be deleted from the filename of data files that have already been processed. DataSmith Batch will simply begin using the updated Timestamp Format for all subsequent files. If a file is being reprocessed, and already has a timestamp assigned to it, as long as the current Batch timestamp format is set to the same format as the reprocessed file (i.e. the filename formats match exactly), the timestamp will be updated to the new date and time.




Upload Portal

The Upload Portal tabbed blade is where the job is configured for CM4D Upload Portal. Optionally, an image can be assigned that will appear on the project card in the portal. Configuring the allowed file extensions and/or types can further restrict the files that can be submitted for a project.



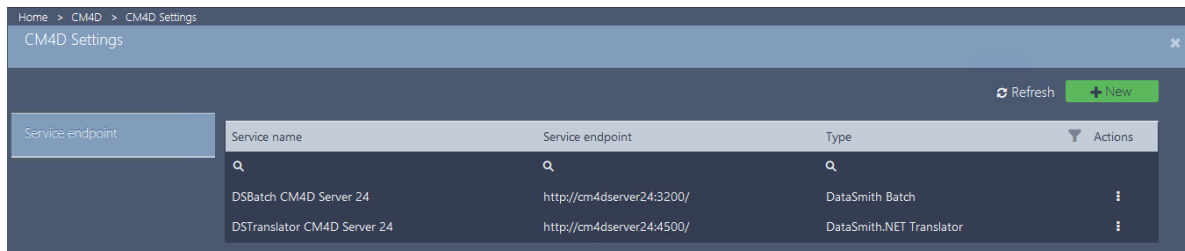
File Extensions	<p>Specify the extension(s) of files allowed for upload to this project. Uploaded files that do not match the file extension(s) will be rejected and will not be submitted to DataSmith Batch for processing.</p> <ul style="list-style-type: none">• Multiple File Extensions - use a comma separator (dmo, dat, xlsx) to set more than one file extension• No Extension Restrictions - leave the field empty to allow any file extension
MIME Type	<p>Specify the types of files allowed for upload to this project (Text, Excel, Text and Excel, All Types). Uploaded files that do not match the MIME type will be rejected and will not be submitted to DataSmith Batch for processing.</p>
Select Image	<p>Add an image to display on the project card. Images are not resized to fill/fit the card.</p> <ul style="list-style-type: none">• Minimum Resolution: 400x255 pixels• Maximum File Size: 3MB• Supported Images Types: JPG, JPEG, PNG, GIF
Show in Upload Portal	<p>Enable to show the project card in the Upload Portal. Uncheck to remove a project from the system. When a project is disabled, the rights to that project are removed from the system. Re-enabling a project requires user rights to be reassigned.</p>
Upload Project	<p>Enter a name for the project for which the job is assigned; must be unique. This name is used to label the Rights when for the project when adding it to a user Role and is what the users see on the project card in the Upload Portal.</p> <ul style="list-style-type: none">• Maximum Characters: 20

CM4D Settings

 The CM4D **Settings** tab contains the service endpoints for the DataSmith Batch Proxy and DataSmith Translator services. Each endpoint service must be added to see any available jobs from that server and must have both services.

Service Endpoint

The Service endpoint grid card lists all defined service endpoints and its properties.



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

- **Open** - Opens the endpoint properties blade.

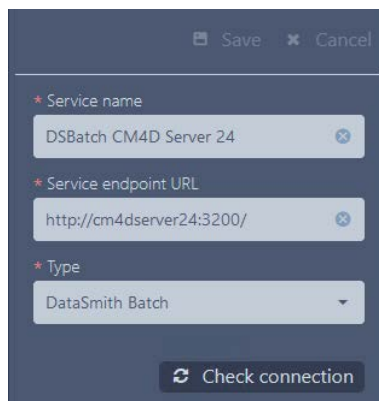
Service Endpoint The server URL for the service, including server name and port.

Service Name The label assigned to the service endpoint. This label is used to identify the server hosting the DataSmith Batch service and jobs.

Type The service type - **DataSmith Batch Proxy** or **DataSmith Translator**.

Service Endpoint Properties

The service endpoint properties is where you enter the service connection information, including the server name, port and type.



Check Connection Click to test the endpoint information to confirm that it connects successfully.



On save/check, the endpoint fails to connect.

- Check the endpoint URL for accuracy - connection type (http or https), server name and port.
- Check the CM4D API service on the endpoint - if stopped, start the CM4D API service and then check the Service Endpoint connection again.

Service Endpoint URL Enter the URL for the service, including the port (http://cm4dserver24:3200/).

Service Name Enter a name for the service. This is the label that appears in the Jobs grid in the 'Endpoint' column.

Type The service type - **DataSmith Batch Proxy** or **DataSmith Translator**.