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CM4D Upload Portal Requirements

Prerequisites

This is only required if you plan to install the Upload Portal on a machine that does not have an internet connection. With an internet connection, the prerequisite is downloaded during installation.

PRODUCT	PREREQUISITE
ATS Security and Configuration Manager	Microsoft .NET Core Hosting Bundle Runtime 2.1.7
CM4D Upload Portal	Microsoft .NET Core Hosting Bundle Runtime 3.1.10

Operating System

- Windows 10
- Server 2012 and higher

Database

- MSSQL 2012 or higher

CM4D Module Ports

The table below shows the default ports assigned by the various ATS installers. These defaults can should be used for reference only, as the ports may have been changed to another value during installation or later by a system administrator.

APPLICATION	DEFAULT PORT	TYPE	INSTALLER
ATS Configuration Manager	5000	Manager + Service	Configuration Manager
ATS Security Manager	4200	Module + Service	Configuration Manager
CM4D Upload Portal	4600	Module + Service	Upload Portal
CM4D Upload Portal API	5200	Service	Upload Portal
DataSmith Batch Proxy	3200	Service	Batch Proxy
DataSmith Translator	4500	Service	DS Translator

Quick Reference Guides

Install ATS Security and Configuration Manager

This guide contains the general steps for installing the ATS Security and Configuration Manager, which is a pre-requisite to installing CM4D Upload Portal.

> 🔗 For the full documentation, refer to the online ATS Security and Configuration Manager Help.

Prepare for Installation

1. **Download ATS Security and Configuration Manager installer**.
2. **Download and install the required .NET Core**. This is only required if you plan to install the Upload Portal on a machine that *does not have an internet connection*. With an internet connection, the prerequisite is downloaded during installation.
   - Microsoft .NET Core Hosting Bundle Runtime 2.1.7

Run the Installer

1. Run the ATS Security and Configuration Manager install executable (as Administrator).
2. Click Next.
3. Agree to the terms and conditions, then click Next.
4. The default installation folder is **C:\Program Files (x86)\Applied Tech Systems\ATS Configuration Manager**.
   a. To change the install folder, click Browse.
   b. Select the new folder and click Select Folder.
   c. Click Next.
5. Enter the database information.
   a. Enter the Server Name, or leave the default (local) if installing on the local machine. The default (local) is automatically resolved to the computer name in the installed configuration files.'
   b. Enter the user credentials to access the database. This user must have a sufficient privilege level to create and modify databases.
      i. To use the current Windows user account, leave the Trusted Connection box checked.
      ii. To use a SQL login, uncheck the Trusted Connection box and enter a username and password.
   c. Set the database.
      i. To allow a new database to be created by the installer, enter a unique name.
      ii. To choose an existing database, click the ellipses button and select a database from the dropdown menu.
   d. Click Test Sql Connection to confirm that the user connection is successful.
      i. If the connection is successful, click Next.
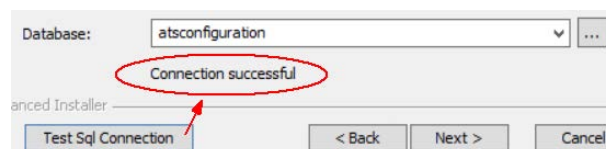
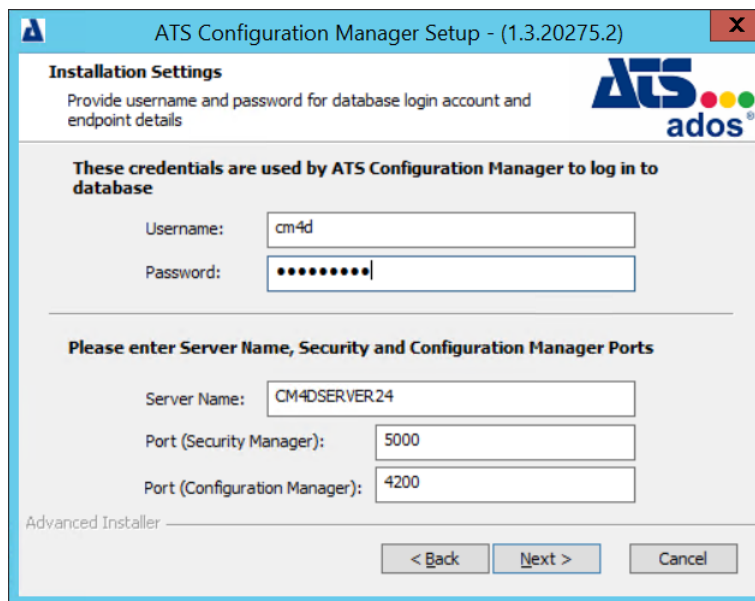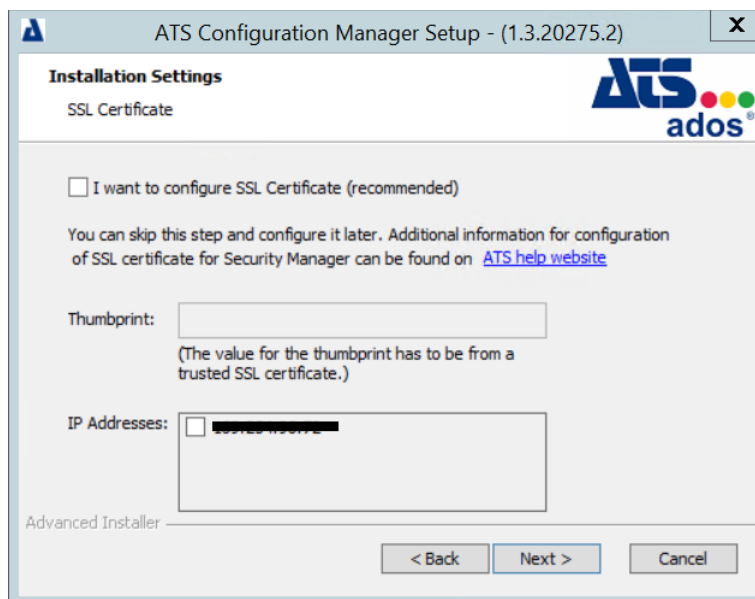ii. If the connect fails, correct the user login and retest.
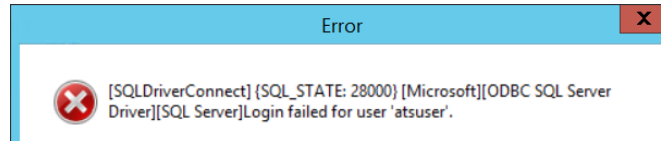
6. Enter the database credentials that the Configuration Manager uses to access the database. This does not have to be the same as the database user entered in the previous page.

7. To use SSL, check the box and enter the required information.

    a. Enter the SSL certificate Thumbprint.
    b. Select the IP Address.
    c. Click Next.

8. Click Install.

Log in to ATS Security and Configuration Manager

1. Browse to the Security Manager URL (http://servername:port/).
2. Log in using the default username (**Admin**) and password (**Admin2018!**).
3. When prompted, set a new password for the Admin user. Once logged in, you should also change the default **Guest** user password (**Guest2018!**).
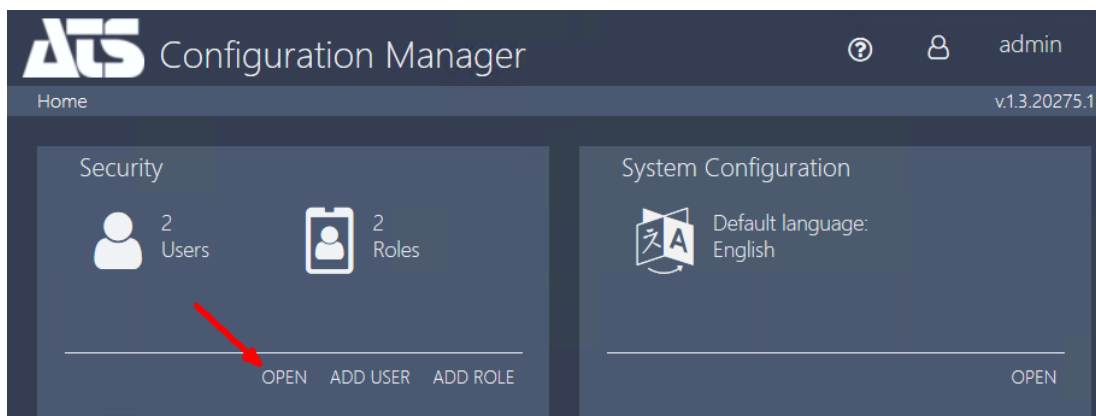

4. Once the password has been successfully changed, click the link to log in with the Admin account.
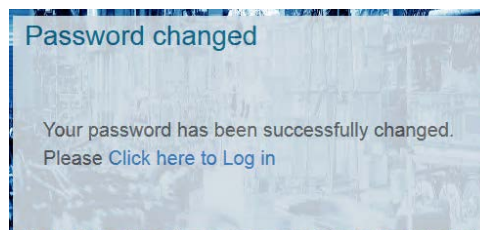
5. On the Security card, click Open.

6. Create users, roles, applications, etc.

Install CM4D Upload Portal

This guide contains the general steps for installing and configuring **CM4D Upload Portal**. The CM4D Upload Portal is installed in three parts:

1. **CM4D Upload Portal** - CM4D Upload Portal and CM4D Upload Portal API Services (see page 10 for detailed steps)
2. **DataSmith Batch Proxy** - DataSmith Batch Proxy API Service (see page 15 for detailed steps)
3. **DataSmith Translator** - DataSmith Translator Service (see page 16 for detailed steps)

> **Notice**
> The CM4D Upload Portal installation process requires a user with administrative access to ATS Security and Configuration Manager.

Prepare for Installation

1. **Access ATS Security and Configuration Manager**.
   - Download and/or install the ATS Security and Configuration Manager. See page 3 for a brief installation guide or visit ATS-HELP for the full ATS Security and Configuration Manager documentation.
   - Log in to Security Manager as a user with Administrator privileges.
2. **Download ATS installers**.
   - ATS CM4D Upload Portal
   - ATS CM4D DataSmith Batch Proxy
   - ATS CM4D DataSmith Translator
   - ATS Licensing Server (only needed if not already running v4.0+). For more information on ATS Licensing, visit ATS-HELP for the full ATS Licensing Server documentation.
3. **Download and install the required .NET Core**. This is only required if you plan to install the Upload Portal on a machine that *does not have an internet connection*. With an internet connection, the prerequisite is downloaded during installation.
   - Microsoft .NET Core Hosting Bundle Runtime 3.1.10

Run Installers

> **Notice**
> Before the Upload Portal can be installed, you must have Configuration Manager and Security set up, and have Admin privileges in ATS Security Manager. See page 3 for a brief installation guide or visit ATS-HELP for the full ATS Security and Configuration Manager documentation.

Install CM4D Upload Portal

1. Run the CM4D Upload Portal install executable (as Administrator).
2. Click Next.
3. Agree to the terms and conditions, then click Next.
4. The default options are to install both the services and CM4D configuration, and to install the Upload Portal to **C:\Program Files (x86)\Applied Tech Systems\ATS Upload Portal**. Most installations will use the defaults provided, but you can modify how it is installed.

a. To change the features installed, uncheck the options.
b. To change the installation folder, go to the tab and either enter a folder path or browse to a folder.

5. Enter the database information. This database is created entirely by the installer, including the database object, tables and procedures.
   a. **Server** - Enter the database server name, or leave the default (local) if installing on the local machine. The default (local) is automatically resolved to the computer name in the installed configuration files.
   b. **Trusted Connection** - Enter the user credentials to access the database management system. This user must have a sufficient privilege level to create and modify databases.
      i. To use the current Windows user account, leave the Trusted Connection box checked.
      ii. To use a SQL login, uncheck the Trusted Connection box.
   c. **Database** - Set the database for the CM4D Upload Portal, DataSmith Translator and DataSmith Batch Proxy services.
      i. To allow a new database to be created by the installer, enter a unique name.
      ii. To choose an existing database, click the ellipses button and select a database from the dropdown menu.
   d. **Test SQL Connection** - Click to confirm that the selected user can connect to the database server.
      i. If the connection is successful, continue.
      ii. If the connect fails, correct the user login and retest.
   e. Click Next.

6. Provide the database login credentials and service endpoint details.
   a. **Credentials** - Enter the database connection information. This user must have a sufficient privilege level to create and modify databases.
      i. Enter a username for the SQL login account.
      ii. Enter a password for the SQL login account.
   b. **Server Name** - Enter the Server Name of the machine hosting the CM4D Upload Portal.
   c. **Port (Upload Portal)** - The default port for the CM4D Upload Portal is 4600. To change the port, enter a new port number.
   d. **Port (Upload Portal API)** - The default port for the CM4D Upload Portal API is 5200. To change the port, enter a new port number.

7. Provide the Security Manager endpoint and Application ID for the Upload Portal.
   a. **Security Manager Endpoint** - Enter the endpoint URL for the ATS Security Manager, including the port (http://servername:4200/).
   b. **Upload Portal Application ID** - The Upload Portal Application ID must be generated by adding the CM4D Upload Portal as a new Application in the ATS Security and Configuration Manager.
      i. Browse to the ATS Security Manager URL (http://servername:4200/) and log in with a user with Admin access.
      ii. On the Security card, click Open.
      iii. On the Applications card, click Add Application.
      iv. Enter the information about the new application.
         1. **Name** - Enter a name for the application, such as 'CM4D' or 'Upload Portal'.

       2. **Description** (optional) - Enter a description for the application that can be seen in the Applications grid card.

       3. **Access Rights URL** - Enter the address endpoint for the CM4D Upload Portal, including the server name and port (http://servername:4600/) entered in the previous install window.

       4. Click Save.

     v. Click on the grid row of the new application to open the Application properties.

         1. In the Access ID field, copy the string (⧉).

     vi. Go back to the Upload Portal installation window.

   c. Paste the Application ID from the Application properties in the Upload Portal Application ID field of the installer window.

8. Click Next.

9. The default endpoints are provided based information provided in previous installation steps.

   a. **Security Manager Endpoint** - Enter the endpoint URL for the ATS Security Manager, including the port (http://servername:4200/).

   b. **CM4D API Endpoint** - Enter the endpoint URL for the CM4D Upload Portal API, including the port (http://servername:5200/).

10. Click Next.

11. Click Install.

12. When prompted about restarting the Configuration Manager service, click OK.

13. Click Finish.

The Upload Portal web page is launched automatically in the default browser. You must install DataSmith Batch Proxy and DataSmith Translator, and then configure ATS Security and Configuration Manager before the Upload Portal can be used.

Install DataSmith Batch Proxy

1. Run the DataSmith Batch Proxy install executable (as Administrator).

2. Click Next.

3. Agree to the terms and conditions, then click Next.

4. The default installation folder is **C:\Program Files (x86)\Applied Tech Systems\ATS CM4D Datasmith Batch Proxy**.

   a. To change the install folder, click Browse.

   b. Select the new folder and click Select Folder.

5. Click Next.

6. Enter the server name, port and Security Manager endpoint.

   a. **Server Name** - Enter the Server Name of the machine hosting the CM4D Upload Portal.

   b. **Port (DataSmith Batch Proxy API)** - The default port for the DataSmith Batch Proxy API is 3200. To change the port, enter a new port number.

   c. **Security Manager Endpoint** - Enter the endpoint URL for the ATS Security manager, including the port (http://servername:4200/).

7. Click Next.

8. Click Install.

9. Click Finish.

Install DataSmith Translator

1. Run the DataSmith Translator install executable (as Administrator).
2. Click Next.
3. Agree to the terms and conditions, then click Next.
4. The default installation folder is **C:\Program Files (x86)\Applied Tech Systems\ATS CM4D Datasmith Translator\.**
   a. To change the install folder, click Browse.
   b. Select the new folder and click Select Folder.
5. Click Next.
6. Enter the server name and port.
   a. **Server Name** - Enter the Server Name of the machine hosting the CM4D Upload Portal.
   b. **Port (DataSmith Translator)** - The default port for the DataSmith Translator is 4500. To change the port, enter a new port number.
7. Click Next.
8. Click Install.
9. Click Finish.

Once the three services are successfully installed, complete the configuration of the CM4D Upload Portal in the ATS Security and Configuration Manager.

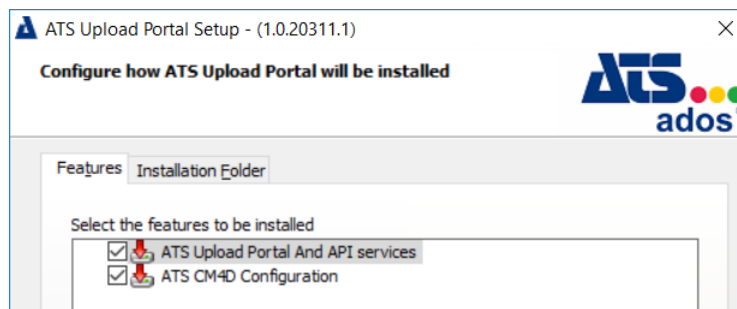## Installations

Install CM4D Upload Portal

The CM4D Upload Portal must be installed on the same machine as the ATS Security and Configuration Manager. See page 3 for a brief installation guide for ATS Security and Configuration Manager or visit ATS-HELP for the full documentation.
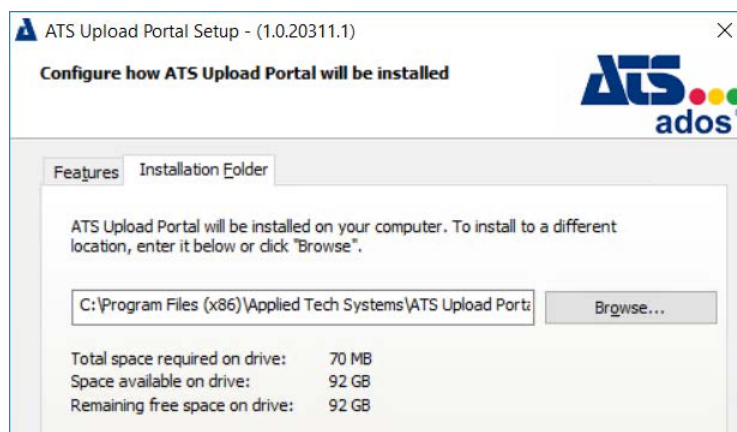
Run the CM4D Upload Portal Installer

> 🛑 **Notice**
> The CM4D Upload Portal installation process requires a user with administrative access to ATS Security and Configuration Manager.
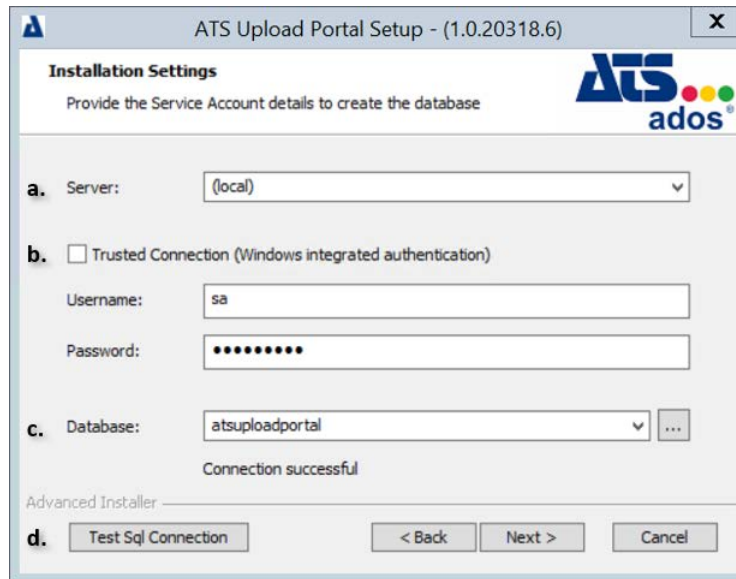
1. Run the CM4D Upload Portal install executable (as Administrator).
2. Click Next.
3. Agree to the terms and conditions, then click Next.
4. The default options are to install both the services and CM4D configuration, and to install the Upload Portal to **C:\Program Files (x86)\Applied Tech Systems\ATS Upload Portal**. Most installations will use the defaults provided, but you can modify how it is installed.
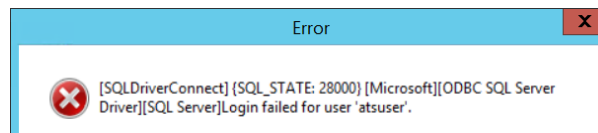   a. To change the features installed, uncheck the options.

   b. To change the installation folder, go to the tab and either enter a folder path or browse to a folder.

5. Enter the database information. This database is created entirely by the installer, including the database object, tables and procedures.

a. **Server** - Enter the database server name, or leave the default (local) if installing on the local machine. The default (local) is automatically resolved to the computer name in the installed configuration files.

b. **Trusted Connection** - Enter the user credentials to access the database management system. This user must have a sufficient privilege level to create and modify databases.
   i. To use the current Windows user account, leave the Trusted Connection box checked.
   ii. To use a SQL login, uncheck the Trusted Connection box.

c. **Database** - Set the database for the CM4D Upload Portal, DataSmith Translator and DataSmith Batch Proxy services.
   i. To allow a new database to be created by the installer, enter a unique name.
   ii. To choose an existing database, click the ellipses button and select a database from the dropdown menu.

d. **Test SQL Connection** - Click to confirm that the selected user can connect to the database server.
   i. If the connection is successful, continue.
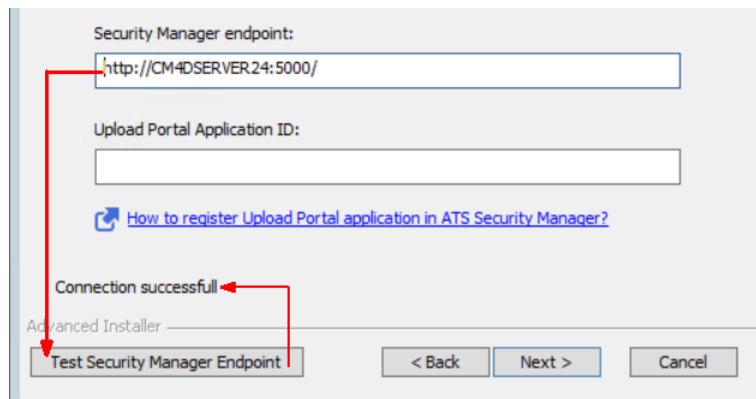   ii. If the connect fails, correct the user login and retest.

e. Click Next.

6. Enter the database connection information. This user must have a sufficient privilege level to create and modify databases.
   a. **Username** - Enter a username for the SQL login account.
   b. **Password** - Enter a password for the SQL login account.
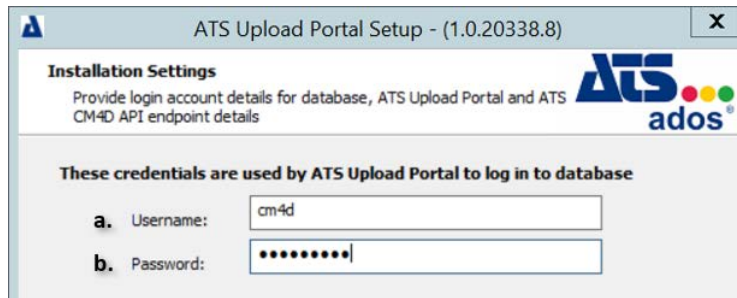
7. Click Next.
8. Provide the service endpoint details.
    a. **Type** - Select the security type, either http or https.
    b. **Server Name** - Enter the Server Name of the machine hosting the CM4D Upload Portal.
    c. **Port** (Upload Portal) - The default port for the CM4D Upload Portal is 4600. To change the port, enter a new port number.
    d. **Port** (Upload Portal API) - The default port for the CM4D Upload Portal API is 5200. To change the port, enter a new port number.
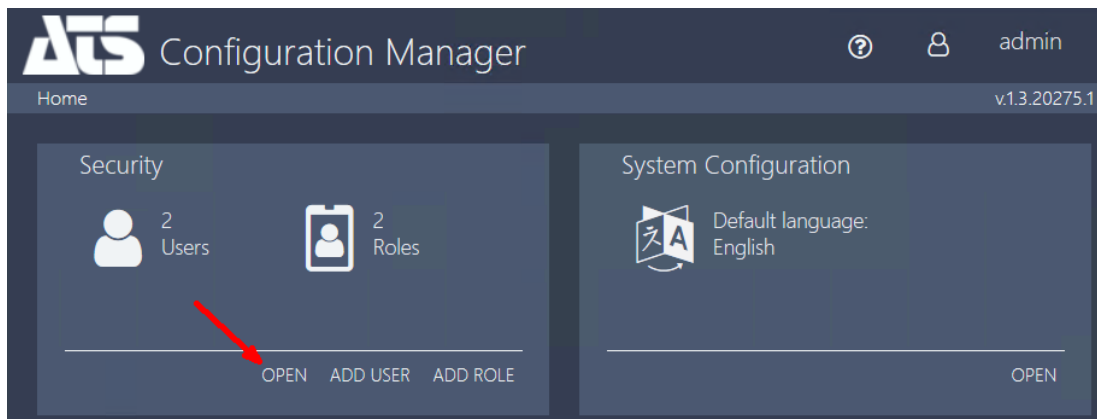   e. **SSL Certificate** (https only) - Select a certificate.
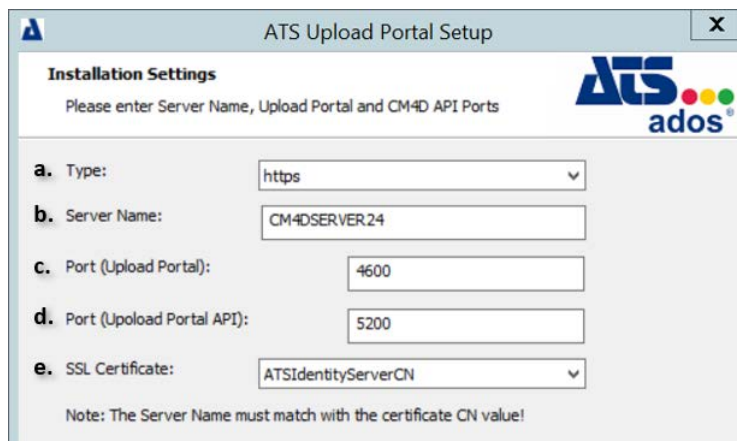
9. Provide the Security Manager endpoint and Application ID for the Upload Portal.
    a. **Security Manager Endpoint** - Enter the endpoint URL for the ATS Security Manager, including the port (http://servername:port/).
    b. **Test Security Manager Endpoint** - Click to confirm you can connect to the endpoint. If the server name or port are incorrect, the test will show the connection failed.
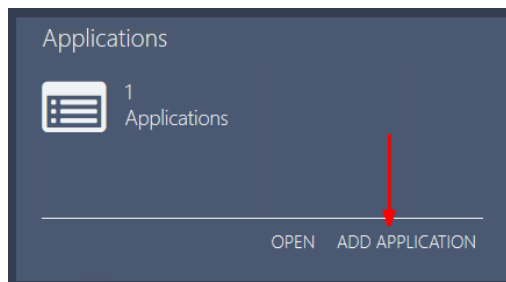
c. **Upload Portal Application ID** - The Upload Portal Application ID must be generated by adding the CM4D Upload Portal as a new Application in the ATS Security and Configuration Manager.

 i. Browse to the ATS Security Manager URL (http://servername:port/) and log in with a user with Admin access.

 ii. On the Security card, click Open.

 iii. On the Applications card, click Add Application.


 iv. Enter the information about the new application.

  1.) **Name** - Enter a name for the application, such as 'CM4D' or 'Upload Portal'.

  2.) **Description** (optional) - Enter a description for the application that can be seen in the Applications grid card.

  3.) **Access Rights URL** - Enter the address endpoint for the CM4D Upload Portal, including the server name and port (http://servername:port/) entered in the previous install window.

  4.) Click Save.

d. Click on the grid row of the new application to open the Application properties.

e. In the Access ID field, copy the string (⧉).
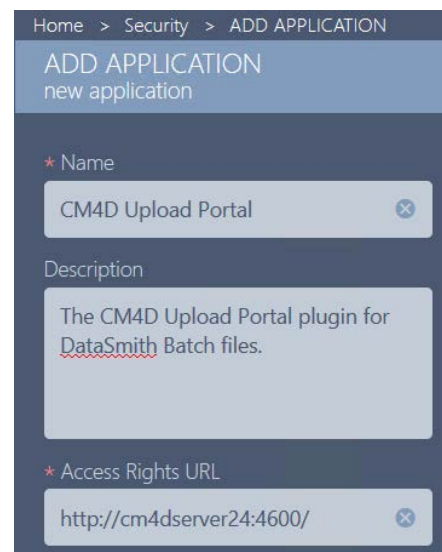
> ⓘ If the application was added successfully, the new row of the Applications grid should have the Status 'Created'.
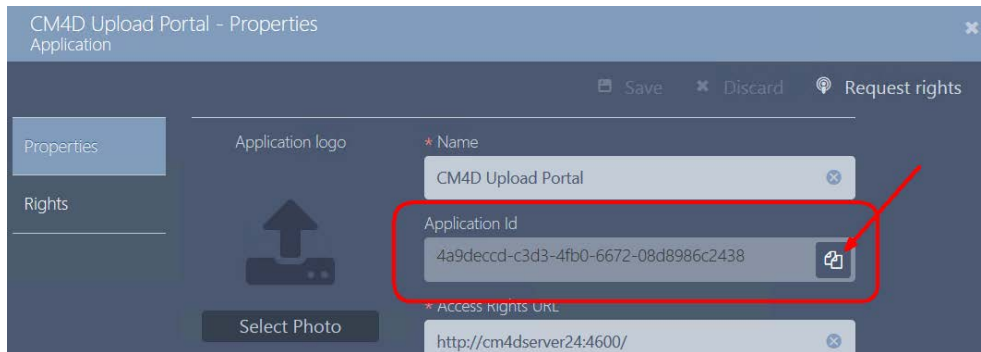
10. Go back to the Upload Portal installation window.
11. Paste the Application ID from the Application properties in the Upload Portal Application ID field of the installer window.
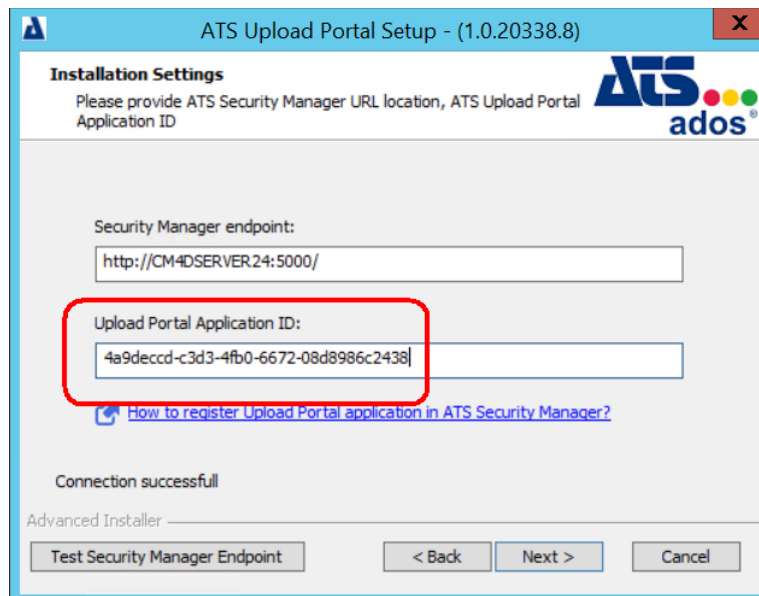

12. Click Next.
13. The default endpoints are provided based information provided in previous installation steps.
    a. **Security Manager Endpoint** - Enter the endpoint URL for the ATS Security Manager, including the port (http://servername:port/).
    b. **CM4D API Endpoint** - Enter the endpoint URL for the CM4D Upload Portal API, including the port (http://servername:port/).
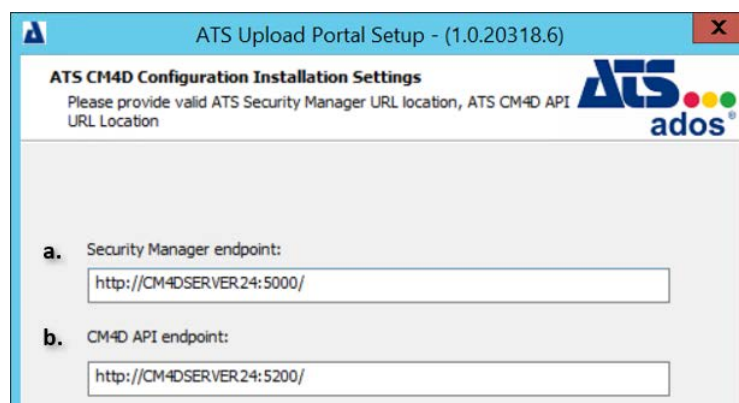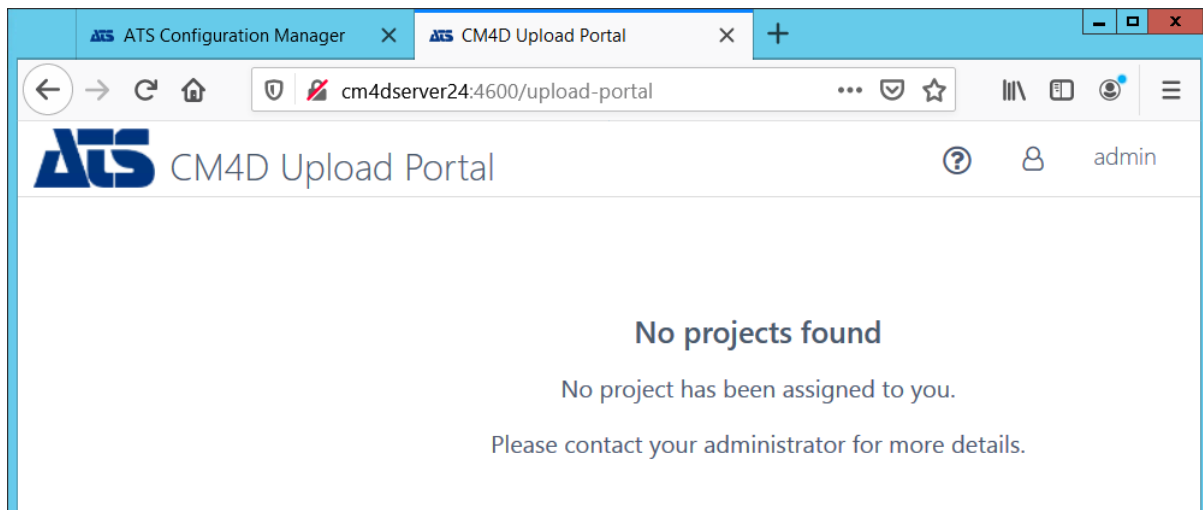
14. Click Next.
15. Click Install.
16. If prompted about restarting the Configuration Manager service, click OK.
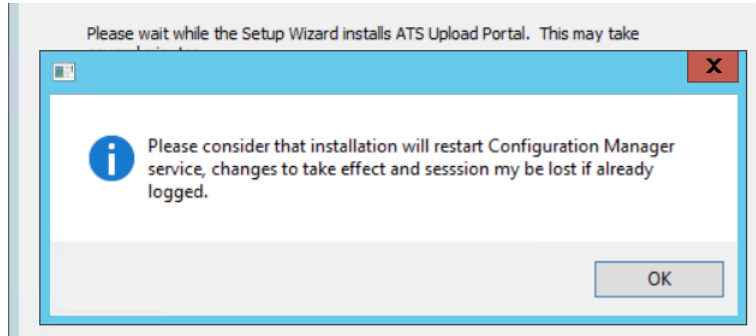
17. Click Finish.

The Upload Portal web page is launched automatically in the default browser. You must complete the configuration in the ATS Security and Configuration Manager before the Upload Portal can be used.

Once the CM4D Upload Portal installation is finished, continue with the DataSmith Batch Proxy and DataSmith Translator installations.

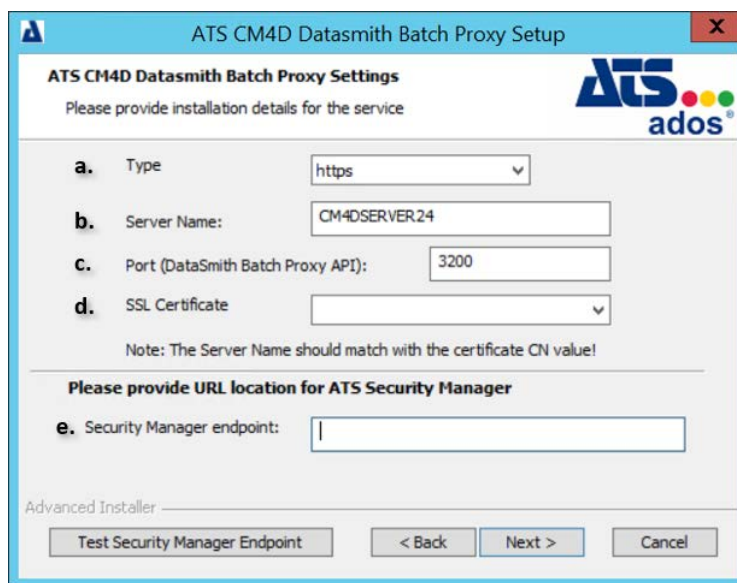## Install DataSmith Batch Proxy

The DataSmith Batch Proxy must be installed on the same machine as CM4D Upload Portal and DataSmith Translator. See page 6 for a brief overall installation guide.

Run the DataSmith Batch Proxy Installer

1. Run the DataSmith Batch Proxy install executable (as Administrator).
2. Click Next.
3. Agree to the terms and conditions, then click Next.
4. The default installation folder is **C:\Program Files (x86)\Applied Tech Systems\ATS CM4D Datasmith Batch Proxy**.

        a. To change the install folder, click Browse.

        b. Select the new folder and click Select Folder.

5. Click Next.

6. Enter the server name, port and Security Manager endpoint.

        a. **Type** - Select the security type, either http or https.

        b. **Server Name** - Enter the Server Name of the machine hosting the CM4D Upload Portal.

        c. **Port (DataSmith Batch Proxy API)** - The default port for the DataSmith Batch Proxy API is 3200. To change the port, enter a new port number.

        d. **SSL Certificate** (https only) - Select a certificate.

        e. **Security Manager Endpoint** - Enter the endpoint URL for the ATS Security manager, including the port (http://servername:port/).

10. Click Next.

11. Click Install.

12. Click Finish.

Once the DataSmith Batch Proxy installation is finished, continue with the DataSmith Translator installation. If the DataSmith Translator is already completed, complete the configuration of the CM4D modules in the ATS Security and Configuration Manager.
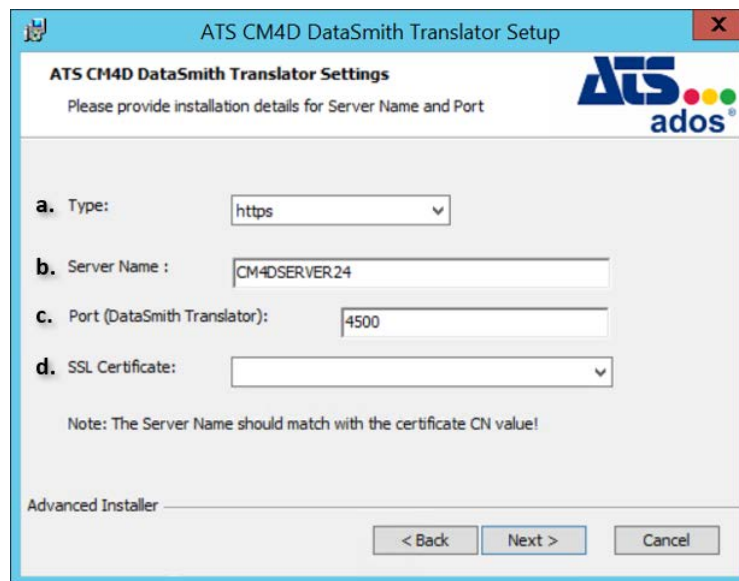
Install DataSmith Translator

The DataSmith Translator must be installed on the same machine as CM4D Upload Portal and DataSmith Batch Proxy. See page 6 for a brief overall installation guide.

Run the DataSmith Translator Installer

1. Run the DataSmith Translator install executable (as Administrator).

2. Click Next.

3. Agree to the terms and conditions, then click Next.

4. The default installation folder is **C:\Program Files (x86)\Applied Tech Systems\ATS CM4D Datasmith Translator**.

        a. To change the install folder, click Browse.

       b.   Select the new folder and click Select Folder.

5.   Click Next.
6.   Provide the service endpoint details.
       a.   **Type** - Select the security type, either http or https.
       b.   **Server Name** - Enter the Server Name of the machine hosting the CM4D Upload Portal.
       c.   **Port (DataSmith Translator)** - The default port for the DataSmith Translator is 4500. To change the port, enter a new port number.
       d.   **SSL Certificate** (https only) - Select a certificate.

7.   Click Next.
8.   Click Install.
9.   Click Finish.

Once the DataSmith Translator installation is finished, continue with the DataSmith Batch Proxy installation. If the DataSmith Batch Proxy is already completed, complete the configuration of the CM4D modules in the ATS Security and Configuration Manager.