

CARM Server

Version 4.65

Administrator's Guide

English

APIS Informationstechnologien GmbH

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Introduction

Welcome to the *APIS CARM Server*, the modularly expendable system for a centralized management of knowledge. Various components are available for this product. The *APIS Client Software* is connected to the *APIS CARM Server* via services (*CSS = CARM Server Service*). Stand-alone, i.e. independent of the client software (time- or event-controlled), tasks are executed by agents (*CSA = CARM Server Agent*). The following services and agents are available:

- *APIS CSS Catalogs* (included in scope of supply)
- *APIS CSS Modules* (optional)
- *APIS CSA Web Publisher* (optional)
- *APIS CSA PDF Publisher* (optional)
- *APIS CSA PDF Reporting* (optional)

The appendix contains a detailed description of the scope of supply provided by the services and agents.

The scope of supply of the *APIS CARM server* includes:

- CD-ROM *APIS CARM Server*
- Documentation (Administrator's Guide, User's Guide)
- PIN

Setting up the environment

Hardware

Specific hardware components are required to be able to use the ***APIS CARM Server***:

- PC with IA32 (x86) compatible processor
- 300 MB of free hard disk space
- CD-ROM drive
- minimum 1024 MB of free RAM
- network connection

Recommended are 4 GB RAM, a CPU as of 2 GHz, as well as a minimum of 1 GB hard disk drive space for the application data.

Software

The operating system platform for the ***APIS CARM Server*** is Microsoft Windows as of Windows 2000. Whether it is a Windows client or a Windows server, is irrelevant for the ***APIS CARM Server***. In addition to the operating system, a working SMTP server is required to request IQ certificates and notify the administrator. It is convenient to set up an e-mail address for the administrator of the ***APIS CARM Server***. If a web server (e.g. Microsoft IIS) is already started on the computer on which the ***APIS CARM Server*** is to be set up, you have to pay attention to avoid conflicts with the web service of the ***APIS CARM Server***. For this purpose, you can either change the port of the already running web service or of the ***APIS CARM Server*** web service. For a description of the respective settings, refer to Web service (page 4).

Network

A correctly configured network is required for the **APIS CARM Server** to work properly. The network adapter must be set up and working. This can be checked by means of the device manager. The TCP/IP protocol must be linked to this adapter. Depending on the available network configuration, the static IP address or the Domain Name System (DNS) name of the server computer can be specified in the workstation settings of the client software.

Installing the APIS CARM Server

Installation

Insert the provided installation disc in the CD-ROM drive. If the Autorun function is enabled in the operating system, the installation will start automatically. Otherwise, the `Setup.exe` file must be started manually in the root directory of the disc. The following guides you through the further steps of installation.

In addition to installing the program files, the Windows system service **APIS CARM Server** will be registered.

Basic configuration

The program `CarmConfig.exe` is intended for the basic configuration. You need administrator rights to start it. On the one hand, a directory for the application data is configured. The CARM Server needs read and write access to this directory. On the other hand, the Personal Identification Number (PIN) is specified, a four-digit code protecting the access to the CARM server license. The PIN is contained in the accompanying letter and should be kept in a safe place protected against unauthorized access. In case that the PIN is lost, the distribution partner may release and assign a new PIN.

Web service

The web service of the *APIS CARM Server* is pre-configured. The file `http.ini` in the program directory contains the settings.

Settings in the `[SERVER]` section:

- `PORT=`
Port address of web service (default: 80)
- `MAXTHREADS=`
Maximum number of simultaneously processed queries (default: 10)
- `THREADTIMEOUT=`
Maximum time in seconds until a query is aborted and a time-out error message displayed (default: 500)
- `AUTHORIZATIONTIMEOUT=`
Time in seconds to pass after the last request until another authentication becomes required (default: 300)

Settings in the `[TYPES]` section:

All document formats are pre-configured. No further settings are required.

The changes will be applied only after the *APIS CARM Server* was restarted.

Firewall permissions

Firewall permissions for the following programs are required:

- `CARM.exe`: UDP port 7291, TCP dynamic port range and TCP port 80 (default port for web service, see page 4)
- `CSAModuleAssistant.exe`: UDP dynamic port range, TCP dynamic port range

Start the APIS CARM Server

The *APIS CARM Server* can be used in the following two variants:

- With graphical user interface
The Windows system service `APIS CARM Server` was installed with the start type “automatic” and must be changed to “manual”. The *APIS CARM Server* is started by executing the program `CARM.exe`.
- As Windows system service
The Windows system service `APIS CARM Server` is automatically started when the operating system is started. To avoid a restart after the installation, the service can be manually started as well.

The graphical user interface

The graphical user interface provides buttons for settings and information.

Log-in/log-off

Settings can be configured when logged in. The factory default password is “Admin” (please note that password is case-sensitive!). To prevent unauthorized access, you should change this password (refer to Settings, page 6). For the same reason, it is recommended to log off the system after the settings were completely configured.

License details

Provides you with details on the licensee and the available services

Delete log entries

This command deletes the entries from the logging window.

Install language

The language selected in the following dialog will be the interface language for the outputs in the logging window as well as the log file and the web service.

Settings

General

Enter the e-mail address of the administrator of the *APIS CARM Server* here. This e-mail address is required by the *APIS CARM Server* to inform the administrator of the *APIS CARM Server* on incoming certificate requests (refer to IQ certificates, page 8). You can also select that the administrator is notified in case of serious errors. The dialog also provides for the option to change the administrator's password.

Any important events will be written in the logging window and a log file. If the log file exceeds the specified size, a successor file will be created.

E-mail

A MAPI profile can be used to send e-mails from the *APIS CARM Server* or SMTP settings can be stored.

CSS Modules

Various settings with regard to the *CSS Modules* can be configured:

- Option to notify module installers by e-mail, if a later version of the installed module was uploaded on the *APIS CARM Server*
- Option to enforce a certain status of modules uploaded on the *APIS CARM Server*
- CSS Modules access rights can be enabled to specifically control the access right to module categories
- Specification of a password for the web access. This password will be required if an internet connection to the *APIS CARM Server* is to be established by a web browser to view the saved module details. No password is assigned in the factory default settings.

CSA Web Publisher

The **CSA Web Publisher** requires the specification of the source directory for the FME documents or the target directory to which the exported HTML files are stored. By clicking on the button `CSA WEB Publisher batch`, you can view available batches, create new ones and select the active batch. The CSA Web Publisher checks for changes of the FME files in the source directory at a set time interval and updates the data in the target directory on the basis of the selected batch. A time interval set to 0 deactivates the agent.

CSA PDF Publisher

After having selected the source directory for the FME files or the target directory to which the PDF documents are stored, export batches can be created. By clicking on the button `CSA PDF-Publisher batch`, available batches can be viewed and new ones created. The active export batches can be selected in the task list. The **CSA PDF Publisher** checks for changes of the FME files in the source directory at a set time interval and updates the data in the target directory on the basis of the selected batches. A time interval set to 0 deactivates the agent.

CSA PDF reporting

The agent **CSA PDF Reporting** requires the specification of the source directory for the FME documents or the target directory to which the exported PDF files and the report are stored. By clicking on the button `CSA PDF Reporting batch`, you can view available batches, create new ones and select the active batch. The agent checks for changes of the FME files in the source directory at a set time interval and updates the data in the target directory on the basis of the selected batch. A time interval set to 0 deactivates the agent.

Data back-up

If the data back-up is enabled, back-up copies of the data set are stored in the specified directory at the given time.

Exit

Quits the *APIS CARM Server*

IQ certificates

The access to the *APIS CARM Server* is controlled by means of certificates. A certificate is kind of an electronic key enabling a client to access the server and thus use its services. The certificate is granted for one *CARM Server Service (CSS)* respectively. The client software initiates the request of a certificate. The *APIS CARM Server* then generates an e-mail containing the data of the IQ user logged into the client and attaches the certificate. This email is sent by the server to the administrator, who can then grant the client access to the *APIS CARM Server* by simply forwarding the e-mail.

IQ Software and APIS CARM Server

For a description of the functions from the client software's point of view, refer to the User's Guide.

Appendix: Available services and agents

APIS CSS Catalogs

This service provides a centrally managed list of functions, failures, characteristics, preventive and detection actions. Full support of multi-lingual functions and easily operated connection in the Input Collector are ensured.

APIS CSS Modules

CSS Module provides a controlled environment for component-oriented re-use and administration of FMEA knowledge. Consistent documentation will be accomplished by creating a module history. Automatic replacement of contents with modules from the library enables the creation of FMEAs at the push of a button. Various updating mechanisms allow for affected users to be notified of changes in a module and thus to be able to react to these changes. Furthermore, information on all the installation locations of the modules is available.

APIS CSA Web Publisher

CSA Web Publisher can automatically create websites from FMEA documents located in a specified directory and make them available on the intranet. Thus, e.g. control plans can be viewed in the production department without knowledge of the client software being required.

APIS CSA PDF Publisher

CSA PDF Publisher can automatically create PDF files from FMEA documents located in a specified directory and make them available on the intranet. Thus, e.g. control plans can be viewed in the production department without knowledge of the client software being required.

APIS CSA PDF reporting

The agent ***CSA PDF Reporting*** provides for the structure-/variant-based export of FMEA documents located in a specified directory as PDF documents. All the exported documents are listed in a central report file together with status details on the individual structures/variants.