



Linedata Capitalstream

User Guides

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End User Guide

Applicability

This document is generally applicable to the Cloud version of Capitalstream.

About this Document

The Capitalstream user guide provides detailed instructions for using Capitalstream for end users.

View the *User Guide* in the online Help

[View the User Guide \(HTML Help\)](#)

Administrator's Guide

The system administrator's guide is available to assist system administrators in configuring and maintaining the Capitalstream application.

More information

For more detailed end-to-end configuration instructions or for more technical content see the following sections of this site:

- Feature Guides
- Integrations Guides
- Line of Business Model documentation

View the *Administrator's Guide* in the online Help

[View the Admin Guide \(HTML Help\)](#)

Cloud Admin Console Guide

About this document

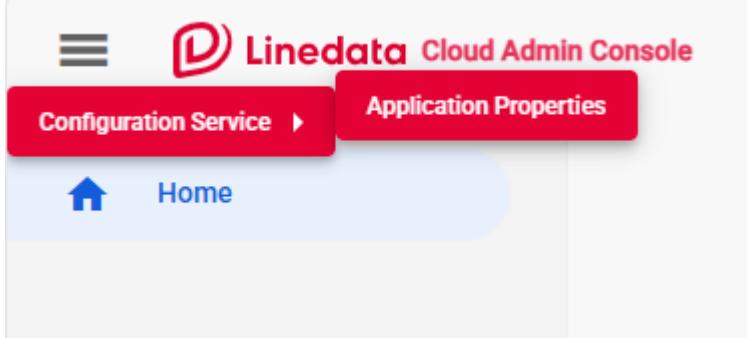
The Cloud Admin Console guide provides instructions for using the Cloud Admin Console for end users. The document includes the following topics:

- About this document
- Using Cloud Admin Console
- Application Properties
 - Adding New Configuration Properties
 - Updating Existing Configuration Properties
 - Deleting Configuration Property
- Application Property Actions
 - Copying one or more Configuration Properties
 - Copying Individual Configuration Property
 - Bulk Copy Configuration Properties
 - Export Configuration Properties
 - Import Configuration Properties
 - Importing / Copying Configuration Property to a New Profile
- User Setup
- Tips, tricks, and other notes

Using Cloud Admin Console

The Cloud Admin Console provides a central location to help you with managing configuration properties.

The root Menu, which gets enabled on clicking the hamburger icon in header (top-left corner), will provide a link for the application properties. Clicking the Linedata icon will take users back to the Landing page (i.e. Home screen) of the Cloud Admin Console.



Application Properties

Application properties allows a user to manage all the configuration properties that are available in the system.

The following operations can be performed from the application properties form.

- Search/Filter for the configuration properties based on **Key, Application, Profile, Category, Sub-category, and Modified Date Range**.
- **Add / Update** individual configuration properties
- Copy one or more configuration properties from one profile to another
- Export configuration properties
- Import configuration properties

All Core configuration properties are available for the default profile. Administrators can create profiles specific to the environment such as **qa**, **env1**, **3c**, and **env4**. If the Capitalstream instance does not find a configuration property in a profile (for example env1) then the system looks for the property in the **default** profile.

Adding New Configuration Properties

New Configuration properties can be created by clicking on **Add New** button in the service properties form.

A **Property Name / Key** should be unique across the application and profile.

While creating a property, the following fields are defaulted with a value and can be modified as needed.

- Label - master
- Application - capitalstream
- Profile - default

Properties can be grouped based on category & sub category. Properties can be classified in two categories- Functional and Technical. **Sub Category** lookup is a multi-select lookup which enables tagging a configuration properties with multiple sub-categories. This will allow users the flexibility to filter and search for properties by one or more sub-categories. Please note, as customer administrators you will only be able to view and edit properties in the Functional category.

Any changes to the Category/Sub-category be must be performed only in consultation with Linedata ES and Product teams.

The screenshot shows the 'Property Configuration' page in the Linedata Cloud Admin Console. The form includes fields for Property Name (checklist.description.short), Value (false), Description (Property to enable checklist description to be displayed long or shc), Label (master), Application (capitalstream), Profile (default), Service Name, Category (Functional), Sub Category (Checklist), System Property, Service Restart Required, Created By (CACSuperAdmin@capitalstream.com), Modified By, and Last Modified Date. Action buttons at the top right include Copy, Save & Apply, Clear Value, and Close.

Last Modified Date

Property Configuration form also includes the **Last Modified Date** field to allow easy indication of when a property was last modified. This will also allow users to filter and access properties that have been modified in a recent release.

Updating Existing Configuration Properties

The value of multiple existing configuration properties can be updated directly in the Service Properties form by modifying the value column in the multi-row table and then clicking on the **Save & Apply** button.

Delete	Select for Action	Key	Value	Application	Profile	Service Restart Required
<input type="checkbox"/>	account_date.formatter	LONG_DATE	capitalstream	default	<input type="checkbox"/>	
<input type="checkbox"/>	AddRecommendChangeDecTRXStatus	DUEDIL,DOCPREP,CLOSING	capitalstream	default	<input type="checkbox"/>	
<input type="checkbox"/>	agency_date.formatter	LONG_DATE	capitalstream	default	<input type="checkbox"/>	
<input type="checkbox"/>	aggregate_bal_qtd.formatter	currency	capitalstream	default	<input type="checkbox"/>	
<input type="checkbox"/>	aggregate_bal_ytd.formatter	currency	capitalstream	default	<input type="checkbox"/>	

If there is a need to update other fields of a configuration property then it can be carried out by clicking on the Property Key link of the corresponding property in the multi-row table, which opens up the Property Configuration form containing all other fields.

Deleting Configuration Property

Configuration properties can be deleted from the Application Properties form by clicking on the **delete** icon in the multi-row table for a property. On clicking the delete icon, a message will be displayed to prompt the user to confirm if they want to proceed with the deletion. Upon confirmation, the configuration property will be deleted from the system. This action cannot be undone so do not delete any Capitalstream core properties.

Delete icon will not be displayed for configuration properties which have the **System Property** checkbox enabled.

Application Property Actions

The Cloud Admin Console gives the administrators the ability to copy, import, and export of application properties from one profile to another.

Copying one or more Configuration Properties

The system administrator has the ability to copy configuration properties from one profile to another in the same environment.

User can select one or more properties to be copied from one profile to another. Multiple Configuration Properties can be selected for copying by checking the **Select to Copy** checkbox in the multi-row table for the corresponding configuration properties and then clicking on **Copy** action link in the Config Property Actions button on the **Service Properties** form.

On the **Copy Configuration Properties** form, the configuration properties selected for copying will be listed. Users will have the ability to amend their selection and exclude previously selected properties for copying by unchecking the **Select To Copy** checkbox in the multi-row table for a property. Selected configuration properties from this screen will be copied to the target profile. In the Copy Configuration Properties form the following fields are also available to allow users to specify the instructions for copying:

- **Source Profile** - Indicates the source profile from which configuration properties are being copied. This field will be non-editable when properties have been pre-selected for copying.
- **Target Profile** - Indicates the target profile to which the configuration properties needs to be copied
- **Override Properties in target profile?** - Indicates if any existing properties in target profile needs to be overridden. This checkbox is enabled by default, if the override option is not selected then only the properties that do not exists in the target environment will be copied

Copy Configuration Properties

Copy Configuration Properties from one profile to another

Select to Copy	Key	Value	Application	Profile
<input checked="" type="checkbox"/>	account_date.formatter	LONG_DATE	capitalstream	default
<input checked="" type="checkbox"/>	account_date.title	Contract_Date	capitalstream	default
<input checked="" type="checkbox"/>	account_status.title	Account_Status	capitalstream	default
<input checked="" type="checkbox"/>	account_type.title	Account_Type	capitalstream	default

Copying Individual Configuration Property

Property Configuration also includes a **Copy** button and individual configuration properties can be copied by clicking on the **Copy** button on this form as well.

Property Configuration

Property Name *	Value *	Description
checklist.description.short	false	Property to enable checklist description to be displayed long or short
Label	Application *	Profile *
master	capitalstream	default
Service Name	Category *	Sub Category *
	Functional	Checklist
<input type="checkbox"/> System Property	<input type="checkbox"/> Service Restart Required	Created By
Modified By	Last Modified Date	CACSuperAdmin@capitalstream.com

Bulk Copy Configuration Properties

The system administrator has the ability to copy configuration properties from one profile to another in the same environment.

To copy configuration properties in bulk from one profile to another:

1. Navigate to the Copy Configuration Properties form by clicking on the **Copy** action link in the **Config Property Actions** button on the Service Properties form.

Delete	Select for Action	Key	Value	Application	Profile	Service Restart Required
<input type="checkbox"/>	account_date.formatter	LONG_DATE		capitalstream	default	<input type="checkbox"/>
<input type="checkbox"/>	AddRecommendChangeDecTRXStatus	DUEDIL,DOCPREPCLOSING		capitalstream	default	<input type="checkbox"/>
<input type="checkbox"/>	agency_date.formatter	LONG_DATE		capitalstream	default	<input type="checkbox"/>
<input type="checkbox"/>	aggregate_bal_qtd.formatter	currency		capitalstream	default	<input type="checkbox"/>
<input type="checkbox"/>	aggregate_bal_ytd.formatter	currency		capitalstream	default	<input type="checkbox"/>

2. In the Copy Configuration Properties form the following fields are available.

- **Source Profile** - Indicates the source profile from which configuration properties are to be copied
- **Target Profile** - Indicates the target profile to which the configuration properties needs to be copied
- **Override Properties in target profile?** - Indicates if any existing properties in target profile needs to be overridden. This checkbox is enabled by default, if the override option is not selected then only the properties that do not exists in the target environment will be copied

← Service Properties

Copy Configuration Properties

Copy Configuration Properties from one profile to another

Source Profile * **default**

Target Profile * **qa**

Override Properties in target profile?

Submit

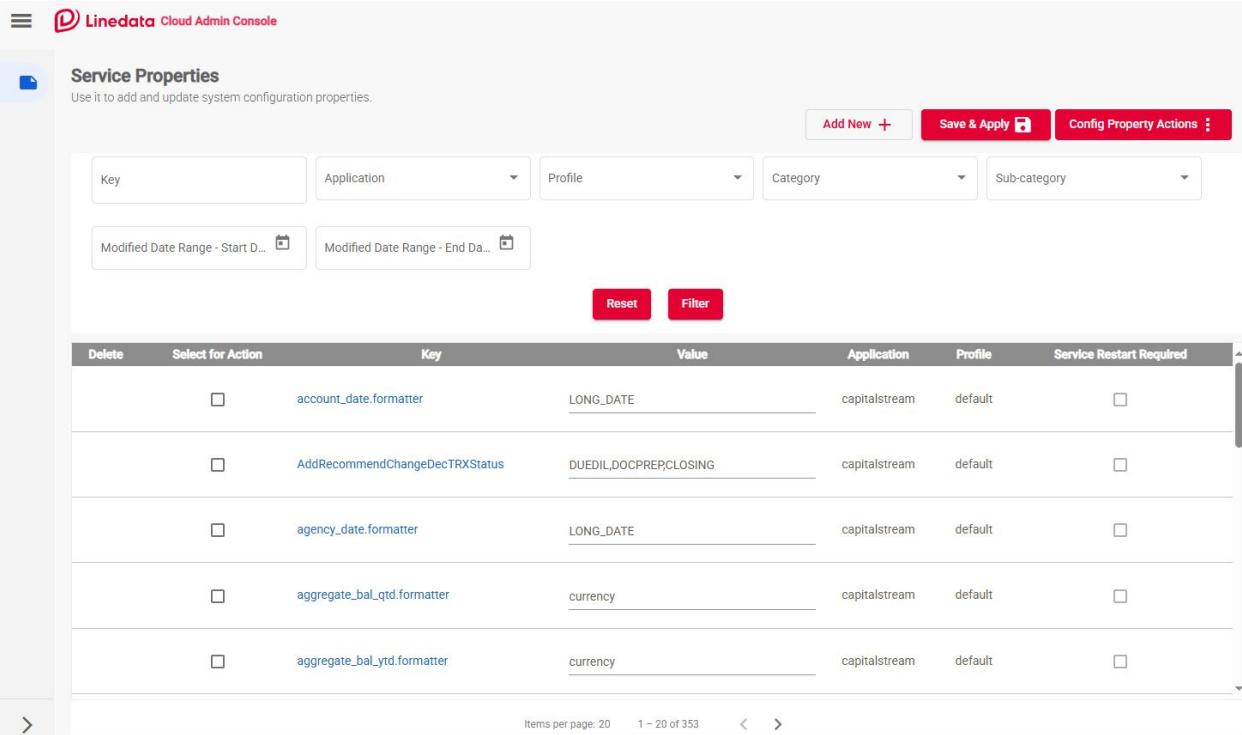
3. On clicking the **Submit button**, the configuration properties are copied from the **Source Profile** to the **Target Profile** and a message appears informing that configuration properties are copied successfully.

Export Configuration Properties

The Export Configuration properties feature enables you to migrate changes from one environment to another. Configurations properties are exported in the json format and are downloaded as a json file, which can be used to import into another environment.

To export configuration properties in bulk for a profile or application, follow the steps below:

1. Navigate to the **Export Configuration Properties** form by clicking on the **Export** action link in the Config Property Actions button on the Service Properties form.



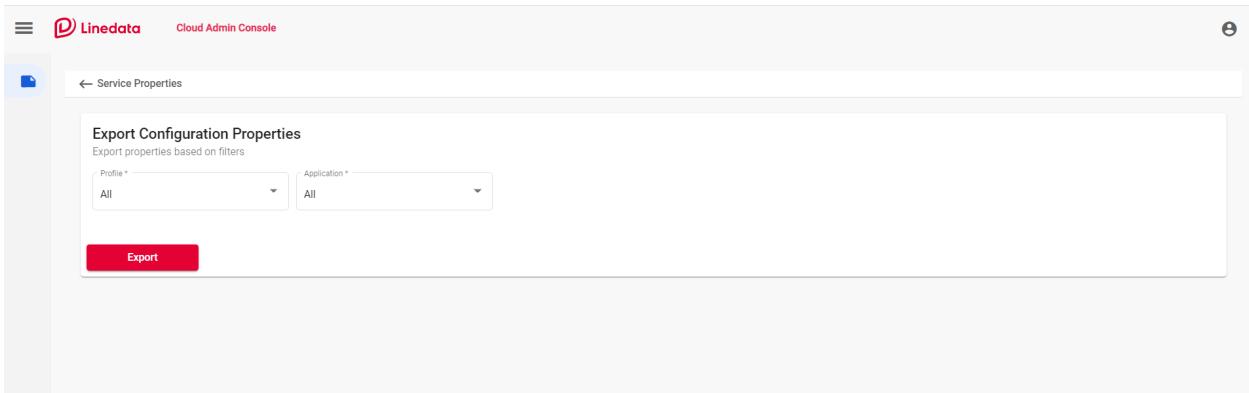
The screenshot shows the 'Service Properties' section of the Linedata Cloud Admin Console. At the top, there are dropdown menus for 'Key', 'Application', 'Profile', 'Category', and 'Sub-category'. Below these are two date range filters: 'Modified Date Range - Start Date' and 'Modified Date Range - End Date'. On the right, there are buttons for 'Add New', 'Save & Apply', and 'Config Property Actions'. The main area displays a table of configuration properties with columns: Delete, Select for Action, Key, Value, Application, Profile, and Service Restart Required. The table contains five rows of data, each with a checkbox in the 'Select for Action' column and a 'Delete' link in the first column. The 'Value' column for the first row contains 'LONG_DATE'. The 'Application' and 'Profile' columns for all rows show 'capitalstream' and 'default' respectively. The 'Service Restart Required' column has an unchecked checkbox for each row. At the bottom of the table, there are navigation arrows and a message indicating 'Items per page: 20' and '1 - 20 of 353'.

Delete	Select for Action	Key	Value	Application	Profile	Service Restart Required
Delete	<input type="checkbox"/>	account_date.formatter	LONG_DATE	capitalstream	default	<input type="checkbox"/>
Delete	<input type="checkbox"/>	AddRecommendChangeDecTRXStatus	DUEDIL,DOCPREPCLOSING	capitalstream	default	<input type="checkbox"/>
Delete	<input type="checkbox"/>	agency_date.formatter	LONG_DATE	capitalstream	default	<input type="checkbox"/>
Delete	<input type="checkbox"/>	aggregate_bal_qtd.formatter	currency	capitalstream	default	<input type="checkbox"/>
Delete	<input type="checkbox"/>	aggregate_bal_ytd.formatter	currency	capitalstream	default	<input type="checkbox"/>

2. In the Export Configuration Properties Section, properties can be exported based on the following filters:

- Profile
- Application

Profile & Application filter fields in the **Export Configuration Properties** form are dropdown fields and will list all the profiles and applications available in the system. For example, If there is a need to export only properties belonging to the "dev" profile then we can do so by selecting "dev" in the Profile field.



If no filters are specified, then all the configuration properties in the system will be exported.

3. Click on the **Export** button and the configuration properties will automatically get downloaded as json file in the browser. The name of the json file will reflect the profile and application selected for export and will also include the timestamp of when the export was initiated. File Name for bulk exports will follow the naming convention **[APPLICATION]_[PROFILE]_[DATE & TIME]_Full Export.json**

The Export Configuration properties feature also provide the ability to export a sub-set of properties, in addition to the bulk export capabilities. Multiple configuration properties can be exported by checking the **Select for Action** checkbox against configuration properties on **Service Properties** form and then clicking on the **Export** action link under **Config Property Actions** Button. On the **Export Configuration Properties** form, the configuration properties selected for export will be listed. Users will have the ability to amend their selection and exclude previously selected properties for exporting by unchecking the **Select** checkbox in the multi-row table for a property. Selected configuration properties from this screen will be exported on clicking the **Export** button. The configuration properties will automatically get downloaded as json file in the browser. The name of the json file will reflect the profile and application of the properties selected for export and will also include the timestamp of when the export was initiated. File Name for such partial exports will follow the naming convention **[APPLICATION]_[PROFILE]_[DATE & TIME]_Partial Export.json**

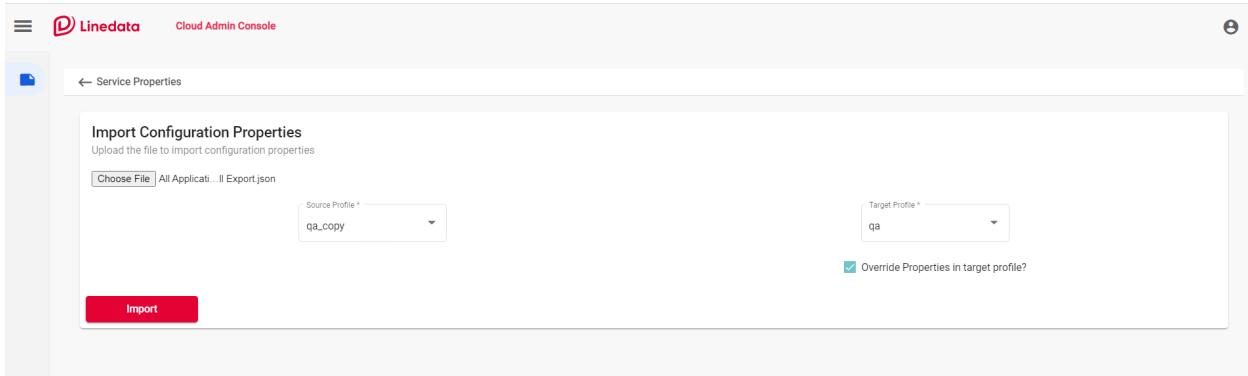
The screenshot shows the 'Service Properties' section of the Cloud Admin Console. At the top, there are dropdown menus for 'Profile' (set to 'default') and 'Application' (set to 'capitalstream'). Below these, a red 'Export' button is visible. A table below lists configuration properties with columns for 'Select', 'Key', 'Value', 'Application', and 'Profile'. Three properties are selected: 'account_date.formatter' (Value: LONG_DATE, Application: capitalstream, Profile: default), 'account_date.title' (Value: Contract_Date, Application: capitalstream, Profile: default), and 'account_status.title' (Value: Account_Status, Application: capitalstream, Profile: default).

Select	Key	Value	Application	Profile
<input checked="" type="checkbox"/>	account_date.formatter	LONG_DATE	capitalstream	default
<input checked="" type="checkbox"/>	account_date.title	Contract_Date	capitalstream	default
<input checked="" type="checkbox"/>	account_status.title	Account_Status	capitalstream	default

Import Configuration Properties

To import configuration properties, follow the steps below:

1. Navigate to the Import Configuration properties form by clicking on the **Import** action link in the Config Property Actions button on the **Service Properties** form.
2. In the Import Configuration Properties section, click **Browse** or **Choose File** (depending on the web browser you are using), navigate to and select the json file containing the exported properties you wish to import.
3. Prior to clicking the **Import** button, specify the following information:
 - a. **Source Profile** - Indicates the source profile from which the configuration properties are to be copied. The options displayed in the **Source Profile** lookup are populated by parsing and reading the **.json** file that was selected for importing. The **All** option is displayed if the multiple profile properties are available in the json file.
 - b. **Target Profile** - Indicates the target profile to which the configuration properties needs to be imported. Configuration properties are imported to all the available profiles in the target environment when a user chooses the **All** option in the Target profile.
 - c. **Override Properties in target profile?** - Indicates if any existing properties in the target profile needs to be overridden. This checkbox is enabled by default, if override option is not selected then only properties that do not exist in the target environment will be copied.



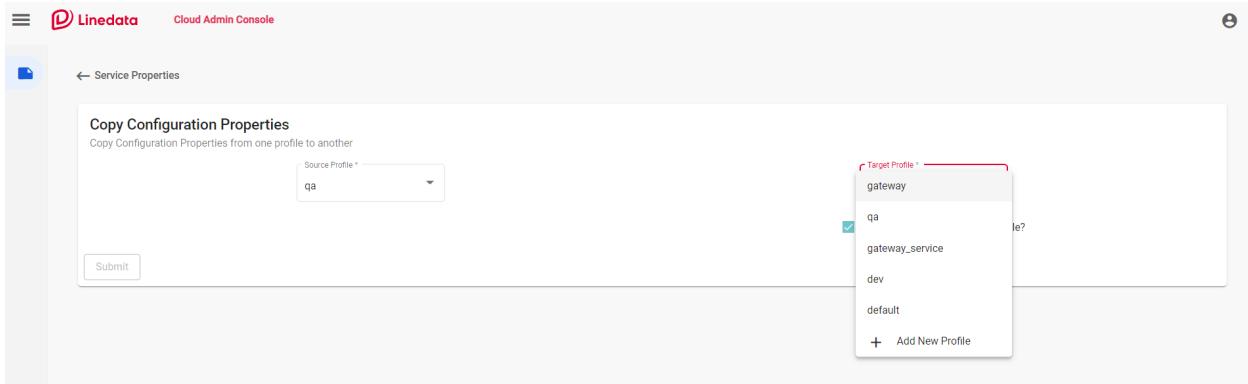
- Upon clicking the **Import** button, the import process is triggered and if the import is successful, a message appears informing that the import was successful.

Importing / Copying Configuration Property to a New Profile

Configuration properties can be imported or copied to any of the existing profile and a new profile can also be created to import / copy configuration properties.

To copy / import configuration properties to a new profile, follow the steps detailed below:

- In the **Target Profile** dropdown, select **Add New Profile** option.



2. On selecting **Add New Profile** option, a popup will be displayed to enter the new **Profile** name.

3. Upon saving the new profile name, it will be defaulted as the **Target Profile** and will be available for selection.

4. On clicking **Submit** button, the configuration properties will be imported / copied to the new profile.

New profile name will be saved to the database only on importing / copying configurations to it.

User Setup

Please contact the Linedata support to setup users in the Cloud Admin Console.

Tips, tricks, and other notes

- While importing configuration properties, the maximum file upload size allowed is 10MB
- A user is able to export one profile at a time
- **Application** and **Profile** Details are not tracked in the logs for the modified properties

- **Created By, Modified By** and **Last Modified Date** fields will be empty for all the existing configuration properties. **Created By** and **Modified By** fields are updated only upon saving the property.
- User lands on the same screen after performing Copy, Delete and Export/Import Operations
- Last modified date is displayed as per browser time zone.
- Custom configuration properties must be mapped to a category and sub-category in the system.