



Configuring File Access for
Axiom Software

KaufmanHall
axiom software

Introduction

This document is provided to assist customers in configuring file access for Axiom Software, in order to perform tasks where files must be read from or saved to various file share locations on the customer’s network. This applies to processes such as import utilities and file processing.

- Required file access 2
- Step-by-step instructions 3
 - Importing Files From a Network Share Local to the Application Server3
 - Importing Files From a Network Share Not Local to the Application Server.....4
 - Reading and/or Exporting Files to a Network Share via the Axiom Scheduler.....4
 - Reading and/or Exporting Files to a Network Share via the Axiom Desktop Client6

Required file access

The following file and folder permissions are required, depending on what task is being performed and in what context:

Task being performed	Where to configure permissions ¹	Account	Required permission	Instructions
Import – Running an import from a network share local to the application server	Axiom Application Server ²	Network Service Account	<ul style="list-style-type: none"> Folder share: At least Read permissions Folder security: At least Read, Read & Execute, and List Folder Contents 	Importing Files From a Network Share Local to the Application Server
Import – Running an import from a network share not local to the application server	Axiom Application Server ²	Application Server Computer Account	<ul style="list-style-type: none"> Folder share: At least Read permissions Folder security: At least Read, Read & Execute, and List Folder Contents 	Importing Files From a Network Share Not Local to the Application Server
File Processing – Running via Scheduler	Axiom Scheduler Service	Scheduler Service Computer Account	<ul style="list-style-type: none"> Folder share: Full Access Folder security: Modify, Read & Execute, List Folder Contents, Read and Write 	Reading and/or Exporting Files to a Network Share via the Axiom Scheduler
File Processing – Running via Axiom Software Client	Axiom Desktop Client	User's Domain Account	<ul style="list-style-type: none"> Folder share: Full Access Folder security: Modify, Read & Execute, List Folder Contents, Read and Write 	Reading and/or Exporting Files to a Network Share via the Axiom Desktop Client

¹ For cloud systems using the Cloud Integration Service with a Remote Data Connection, these steps must be performed on the server hosting the Cloud Integration Service instead of the Application Server or the Scheduler Server.

² If the import uses the "file watcher" feature, then the Axiom Scheduler Service must also have access to the designated folder, in order to monitor the folder for new or updated files.

Step-by-step instructions

The following instructions are provided to assist your IT department in configuring the necessary file access. Steps may be slightly different depending on your server operating system. If you need assistance, please contact Axiom Support.

IMPORTANT: Axiom Support strongly recommends placing all import source files on the Axiom Application Server itself, using a network share local to the Application Server.

Importing Files From a Network Share Local to the Application Server

Follow these instructions if the import source files will be placed in a network share that is located on the Axiom Application Server.

1. On the C:\ drive of the application server, create a folder titled: **AxiomFiles**.
This is the folder where the import source files will be read from. Your imports must be configured to read from this location. (You can use a different folder name; these instructions assume a folder named “AxiomFiles”.)
2. Right-click on the **AxiomFiles** folder and choose **Properties**.
3. In the Properties window, click the **Sharing** tab, and then click the **Advanced Sharing** button.
4. In the Advanced Sharing window, check **Share this folder**, and then click the **Permissions** button.
5. In the Permissions window, click the **Add** button.
6. In the Select Users... window, in the “Enter the object names to select” box, type **NETWORK SERVICE**, and then click **OK** to close the window.
7. In the Permissions window, select the **NETWORK SERVICE** account. In the Allow column, grant at least **Read** permission.
8. Click **OK** to close the Permissions window, and then click **OK** to close the Advanced Sharing window.
9. In the Properties window, click the **Security** tab, and then click the **Edit** button.
10. In the Permissions window, click the **Add** button.
11. In the Select Users... window, in the “Enter the object names to select” box, type **NETWORK SERVICE**, and then click **OK** to close the window.
12. In the Permissions window, select the **NETWORK SERVICE** account and make sure the following permissions are granted in the Allow column at minimum: **Read & Execute**, **List Folder Contents**, and **Read**.
13. Click **OK** to close the Permissions window, and then click **Close** to close the Properties window.

Importing Files From a Network Share Not Local to the Application Server

Follow these instructions if the import source files will be placed in a network share that is *not* located on the Axiom Application Server.

1. Right-click on the folder where the import source files will be placed, and choose **Properties**.
2. In the Properties window, click the **Sharing** tab, and then click the **Advanced Sharing** button.
3. In the Advanced Sharing window, check **Share this folder**, and then click the **Permissions** button.
4. In the Permissions window, click the **Add** button.
5. In the Select Users... window, click the **Object Types** button.
6. In the Object Types window, select the check box for **Computers**, and then click **OK** to close the window.
7. In the Select Users... window, in the "Enter the object names to select" box, type the name of your application server, and then click **OK** to close the window.
8. In the Permissions window, select the application server name (something like AXIOMAPP\$). In the Allow column, grant at least **Read** permission.
9. Click **OK** to close the Permissions window, and then click **OK** to close the Advanced Sharing window.
10. In the Properties window, click the **Security** tab, and then click the **Edit** button.
11. In the Permissions window, click the **Add** button.
12. In the Select Users... window, click the **Object Types** button.
13. In the Object Types window, select the check box for **Computers**, and then click **OK** to close the window.
14. In the Select Users... window, in the "Enter the object names to select" box, type the name of your application server, and then click **OK** to close the window.
15. In the Permissions window, select the application server name (something like AXIOMAPP\$), and make sure the following permissions are granted in the Allow column at minimum: **Read & Execute, List Folder Contents, and Read**.
16. Click **OK** to close the Permissions window, and then click **Close** to close the Properties window.

Reading and/or Exporting Files to a Network Share via the Axiom Scheduler

Follow these instructions if you will be running File Processing in Scheduler to perform any of the following processing actions: Save as Snapshot, Export to Delimited File, File Collect, or Batch.

Assign a Service Account to the Axiom Scheduler Service

1. Create a Domain User Account within Active Directory which will be used as the Service Account for the Axiom Scheduler Service.
2. On the server hosting Axiom Scheduler Service, click **Start** and then go to **Administrative Tools**.
3. Launch **Computer Management**.
4. In the Computer Management window, expand **Local Users and Groups**, and then click **Groups**.
5. In the list of groups, double click the **Administrators** group.

6. In the Properties window, click the **Add** button.
7. In the Select Users... window, in the “Enter the object names to select” box, type the name of the Domain User Account that you created in step 1, and then click **OK** to close the window.
8. Click **OK** to close the Properties window, and then close the Computer Management window.
9. Back in Administrative Tools, launch **Services**.
10. In the Services window, right-click on **Axiom EPM Scheduler Service** and choose **Properties**.
11. In the Properties window, click the **Log On** tab, and then select **This account**.
12. Click the **Browse** button.
13. In the Select User window, click the **Locations** button.
14. In the Locations window, select **Entire Directory**, and then click **OK** to close the window.
15. In the Select User window, in the “Enter the object name to select” box, type the name of the Domain User Account that you created in step 1, and then click **OK** to close the window.
The name of the Domain User Account should now display next to “This account” on the Log On tab of the Properties window. This account is now the Service Account for the Scheduler Service.
16. Enter the password for the Domain User Account into the **Password** and **Confirm Password** fields, and then click **OK** to close the window. Click **OK** to both subsequent confirmation messages.
17. In the Services window, right-click on **Axiom EPM Scheduler Service** and choose **Restart**. Once the service has restarted, close the window and any other remaining windows.
18. Log off the server and then log back in as the Domain User Account to create a local profile on the server.

IMPORTANT: If you are using multiple Scheduler Servers, repeat this process on each server, using the same Domain User Account.

Assign Network Share Permissions to the Service Account

1. Right-click on the folder that you want to use as the target folder for file processing, and then choose **Properties**.
2. In the Properties dialog, click the **Sharing** tab, and then click the **Advanced Sharing** button.
3. In the Advanced Sharing window, check **Share this folder** (if it is not already checked), and then click the **Permissions** button.
4. In the Permissions window, click the **Add** button.
5. In the Select Users... window, in the “Enter the object names to select” box, type the name of the Domain User Account that was designated as the Service Account for Axiom Scheduler Service, and then click **OK** to close the window.
6. In the Permissions window, select the Domain User Account. In the Allow column, grant **Full Control**.
7. Click **OK** to close the Permissions window, and then click **OK** to close the Advanced Sharing window.
8. In the Properties window, click the **Security** tab, and then click the **Edit** button.
9. In the Permissions window, click the **Add** button.
10. In the Select Users... window, in the “Enter the object names to select” box, type the name of the Domain User Account, and then click **OK** to close the window.

11. In the Permissions window, select the Domain User Account, and make sure the following permissions are granted in the Allow column at minimum: **Modify, Read & Execute, List Folder Contents, Read and Write**.
12. Click **OK** to close the Permissions window, and then click **Close** to close the Properties window.

Reading and/or Exporting Files to a Network Share via the Axiom Desktop Client

Follow these instructions if you will be running File Processing from the Axiom Desktop Client to perform any of the following processing actions: Save as Snapshot, Export to Delimited File, File Collect, or Batch.

1. Right-click on the folder that you want to use as the target folder for file processing, and then choose **Properties**.
2. In the Properties dialog, click the **Sharing** tab, and then click the **Advanced Sharing** button.
3. In the Advanced Sharing window, check **Share this folder** (if it is not already checked), and then click the **Permissions** button.
4. In the Permissions window, click the **Add** button.
5. In the Select Users... window, in the "Enter the object names to select" box, type either of the following names, and then click **OK** to close the window.
 - The name of the Domain User Account for the specific Axiom Software user who will be performing the process.<OR>
 - The name of a Domain Group that the Axiom Software user belongs to.
6. In the Permissions window, select the account or group name that you entered in the previous step. In the Allow column, grant **Full Control**.
7. Click **OK** to close the Permissions window, and then click **OK** to close the Advanced Sharing window.
8. In the Properties window, click the **Security** tab, and then click the **Edit** button.
9. In the Permissions window, click the **Add** button.
10. In the Select Users... window, in the "Enter the object names to select" box, type the same account or group name, and then click **OK** to close the window.
11. In the Permissions window, select the account or group name, and make sure the following permissions are granted in the Allow column at minimum: **Modify, Read & Execute, List Folder Contents, Read and Write**.
12. Click **OK** to close the Permissions window, and then click **Close** to close the Properties window.