



Coresuite Administration Assistant

VERSION 7.35

Manual



Coresuite Administration Assistant

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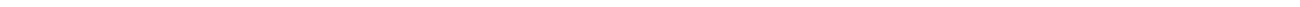
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Introduction

1



1 Introduction

This document describes the functionality and handling of the Coesuite Administration Assistant (CAA).

1.1 Overview

The Coesuite Administration Assistant (CAA) is a new external tool available to be used together with the Coesuite Installer version 6.70 or later.

This tool completes the harmonization we introduced with the new installer and is supported for all environments (SQL onPremise, SQL OnDemand, HANA onPremise and HANA OnDemand).

The CAA primarily allows for the simplified handling of module(sip) installations and provides an overview of all connected companies and their installed modules (sips).

It provides the option to work simultaneously with multiple companies and to perform bulk operations such as:

- Install Modules
- Remove Modules
- Install Licenses

In addition, it simplifies the process of providing version and system details for the Support Team.

1.2 What's New?

To see the latest changes for the Coesuite Administration Assistant (CAA), please refer to our [Release Notes](#). Plans for future changes may be reviewed in our [Roadmap](#).

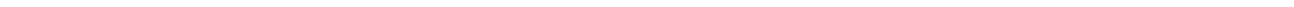
1.3 Notes

Notes can always be found in the documentation. Useful tips and warnings are marked with the listed symbols below:

Icon	Term
	Warning
	Notice
	Example
	Syntax

Installation

2



2 Installation

This chapter will help you with the first installation of Coresuite Administration Assistant. Follow the descriptions in the sub chapters.

[System requirements](#)
[Installation](#)

2.1 System requirements

Please refer to our general [System Requirements](#).

The Coresuite Administration Assistant requires:

- a) that the environment is updated to Coresuite 6.70 or later - please check our "[IMPORTANT ANNOUNCEMENT regarding Coresuite Installer and Framework version 6.70 or higher](#)" FAQ
- b) Microsoft .NET Framework 4.7.2. You can find the installer and instructions here: [Microsoft .NET Framework 4.7.2 offline installer for Windows](#)

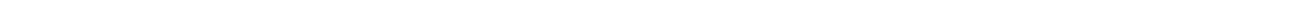
2.2 Installation

To install the Coresuite Administration Assistant, run the setup program named "*Coresuite Administration Assistant.msi*" and follow the instructions on screen.

To run the application, locate the shortcut created during the installation or alternatively, find the installation directory and run the application executable "*Coresuite Administration Assistant.exe*".

Working with the application

3



3 Working with the application

[Overview Main Window](#)

[Companies Tab](#)

[Tasks Tab](#)

[Settings Tab](#)

3.1 Overview Main Window

After starting the application, you will be presented with the main screen.

From here you can configure companies, modules and select tasks to execute.

You will be able to see any available company databases and a screen log which is used to display messages from the application.



The Coresuite Administration Assistant has a simple and intuitive main screen consisting of the following major elements:

- 1 [Companies](#)
This is where you can configure the settings for the company databases (Companies) for which you want to perform any of the available tasks.
- 2 [Tasks](#)
This is the default tab from where most of the operations (tasks) such as installing and removing modules are performed.
- 3 [Settings](#)
This tab offers a number of settings that specify the behaviour of the application itself.
- 4 Current Version
The currently installed version of CAA is displayed here.
- 5 Resize handle
You can resize the window. When you close CAA, the window size will be saved and used automatically the next time you start it.

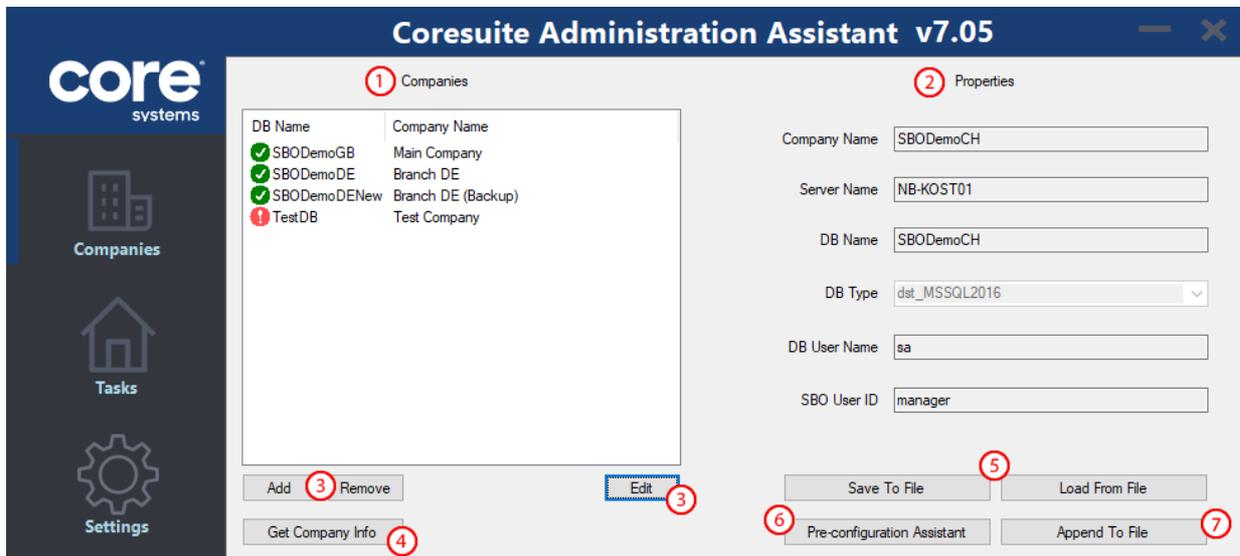
3.2 Companies Tab

This is where you can configure the connection settings for the company databases (Companies) for which you want to perform any of the available tasks.

You can add, remove, edit, save and load those settings.

You can also access the Pre-configuration Assistant which helps you to bulk configure the connection settings for multiple company databases automatically.

The **Get Company Info** button allows to get detailed information of any of the selected company databases.



1 Companies

This part of the screen displays the list company databases you are currently working with.

Depending on your settings, this list is automatically populated with the list of company databases you were working with during your previous session.

2 Company Properties

This part of the screen displays the connection properties of any company database selected from the "Companies" list.

3 [Add, Remove, Edit](#)

These buttons allow you to add, remove and edit connection details for the company databases in the "Companies" list.

4 [Get Company Info](#)

This button opens an overview of all modules/sips available in the company databases selected from the "Companies" list. This info can be easily saved in a file and forwarded to Support.

5 [Save/Load File](#)

These buttons allow you to save your current list of company connection properties in a file or load any previously saved file. This way we can easily switch between different sets of companies lists.

6 [Pre-configuration Assistant](#)

This button opens the Pre-configuration Assistant screen which allows to easily setup multiple company databases and save those settings in a file.

7 [Append To File](#)

This button opens the Append To File screen which allows to add company databases to your existing ones and save their settings in a file.

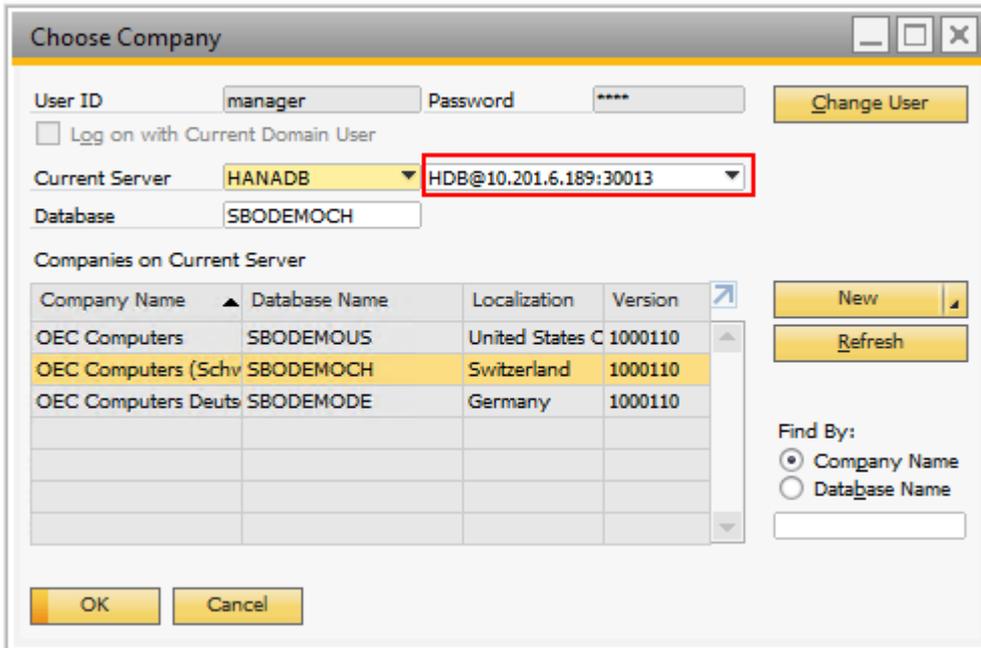
3.2.1 Working with HANA 2.0

SAP Business One version 10.0 runs only on HANA 2.0.

The way to connect to a HANA 2.0 server is slightly different than connecting in previous HANA versions.

With HANA 2.0 the server name includes a prefix.

Also the port number changes depending on the tenant used.

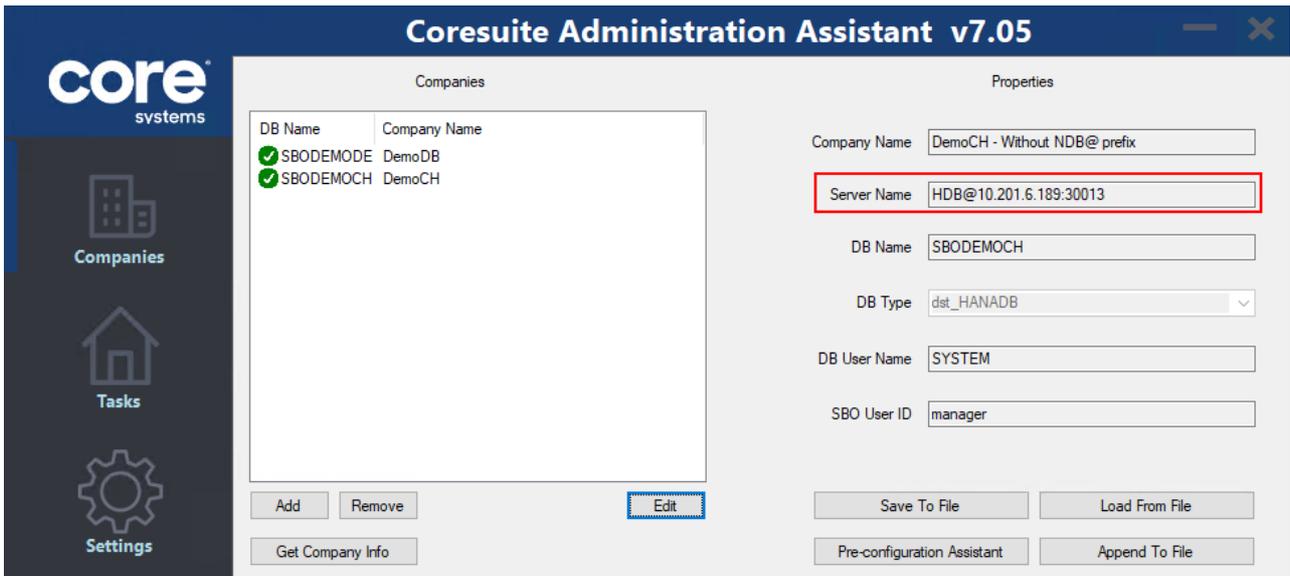


You may have noticed in your HANA server or in SAP Business One Company Selection Screen that the server name appears in the following format:

{prefix}@{address}:{port}

for example: **HDB@10.201.6.189:30013**

As a guideline, when you want to connect to a company via CAA, use the server details as they appear in the SAP Business One Company Selection Screen:



3.2.2 Add / Remove / Edit

By clicking "Add", the Company Details screen appears.

You can use this option to add a single company database to your list of "Companies".

By clicking "Edit", you can edit the connection properties of a selected company database.

By clicking "Remove", the currently selected company database is removed from your "Companies" list.

Field description

Field name	Description
Company Name	The name of the company.

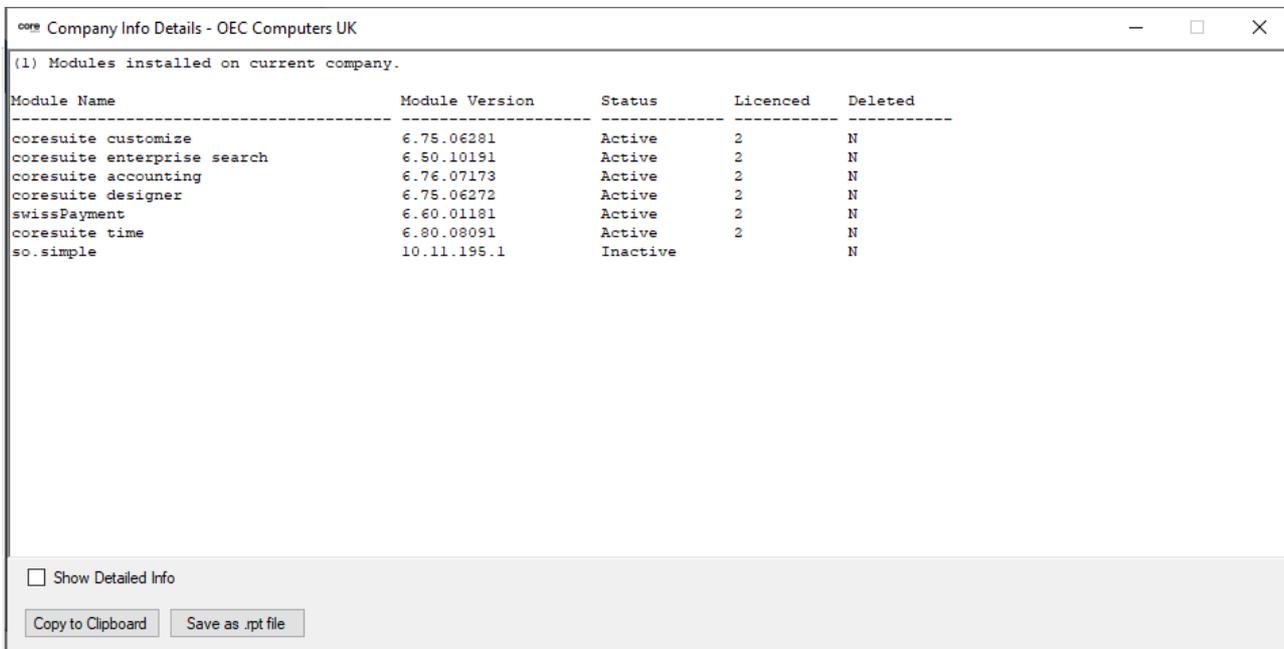
	This field is not required for the actual connection. You can use this field to enter the actual company name or simply enter the DB name, as this is the name that helps you identify your company in the list of "Companies" .
Server Name	The name of the server. For SQL servers, the actual server name or IP address of the server is sufficient, for HANA servers, the port must also be provided e.g. 192.168.2.1:30015
DB Name	The name of the actual database.
DB User Name	The name of the user connecting to the database e.g. sa/SYSTEM or the alternative sa/SYSTEM user.
DB User Password	The password for the above user.
SBO User ID	The name of the user connecting to SAP Business One e.g. manager.
SBO User Password	The password for the above user.
Server Type	The server/database type. List of types is taken from SAP Business One SDK.
Language	Any error messages produced by the SDK will be shown in the selected language.
Use Trusted	Use this option (SQL only) if you have configured your SQL DB Users accordingly.

Show Password	Use this option to display the actual Passwords. For safety reasons you cannot see passwords when editing a company. In order to make a password visible, you must clear it first.
Clear	Click this to clear the respective password.

3.2.3 Get Company Info

When selecting a company database from the "Companies" list and clicking "Get Company Info", a new window displaying an overview of all modules/sips available in the selected company database, appears. Checking "Show Detailed Info" results in additional info about the company database and its environment to be displayed.

You can send this information to the Clipboard and/or save it as a .rpt file by using the appropriate buttons. When saving, the application automatically saves the full details, ignoring the "Show Detailed Info" tick. When contacting Support, this information should always be included in your ticket.



3.2.4 Save To File / Load From File

The "Companies" list including the connection settings for the company databases can be easily saved to a file. This enables you to work with various sets of company databases .

- 1 Save To File
This option allows you to save the current list of company databases, conveniently storing it as a json file.
- 2 Load From File
This option allows you to quickly load a previously saved list of company databases. A Windows File Dialog appears and prompts you to choose a file with a json extension.

3.2.5 Pre-configuration Assistant

The Pre-configuration Assistant supports you in configuring the connection settings for multiple company databases in one go.

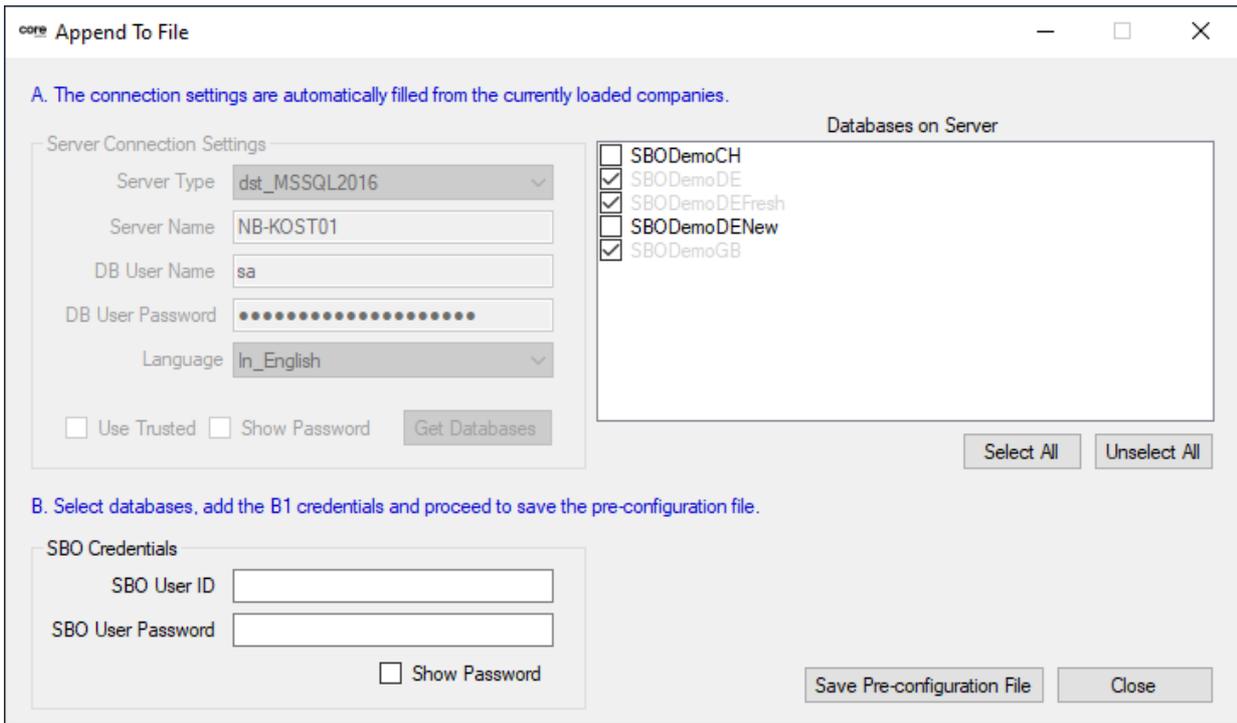
Field description

Field name	Description
A. Connection Settings for the Server you want to access	
Server Type	The server/database type. List of types is taken from SAP Business One SDK.
Server Name	The name of the server. For SQL servers, the actual server name or IP address of the server is sufficient, for HANA servers, the port must also be provided e.g. 192.168.2.1:30015
DB User Name	The name of the user connecting to the database e.g. sa/SYSTEM or the alternative sa/SYSTEM user.
DB User Password	The password for the above user.
Language	Any error messages produced by the SDK will be shown in the selected language.
Use Trusted	Use this option (SQL only) if you have configured your SQL DB Users accordingly.
Show Password	Use this option to display the DB User Password.
Get Databases	Using the Connection Settings described below you establish a connection to the server you want. After pressing 'Get Databases', all databases that are potentially SAP Business One company databases will appear in the list. Select any of those and then proceed to B.
B. Specify the connection details for the selected company databases (All fields are optional. If you leave any blanks, you will have to fill them in later for each company database as described in the Add / Remove / Edit section above)	

SBO User ID	The name of the user connecting to SAP Business One e.g. manager.
SBO User Password	The password for the above user.
Show Password	Use this option to display the SBO User Password.
Save Pre-configuration File	This option allows you to save the pre-configuration, conveniently storing it in as json file.

3.2.6 Append To File

The Append To File screen allows you to add additional companies in your list from the same server. Companies already in the list appear checked and grayed out.



Field description

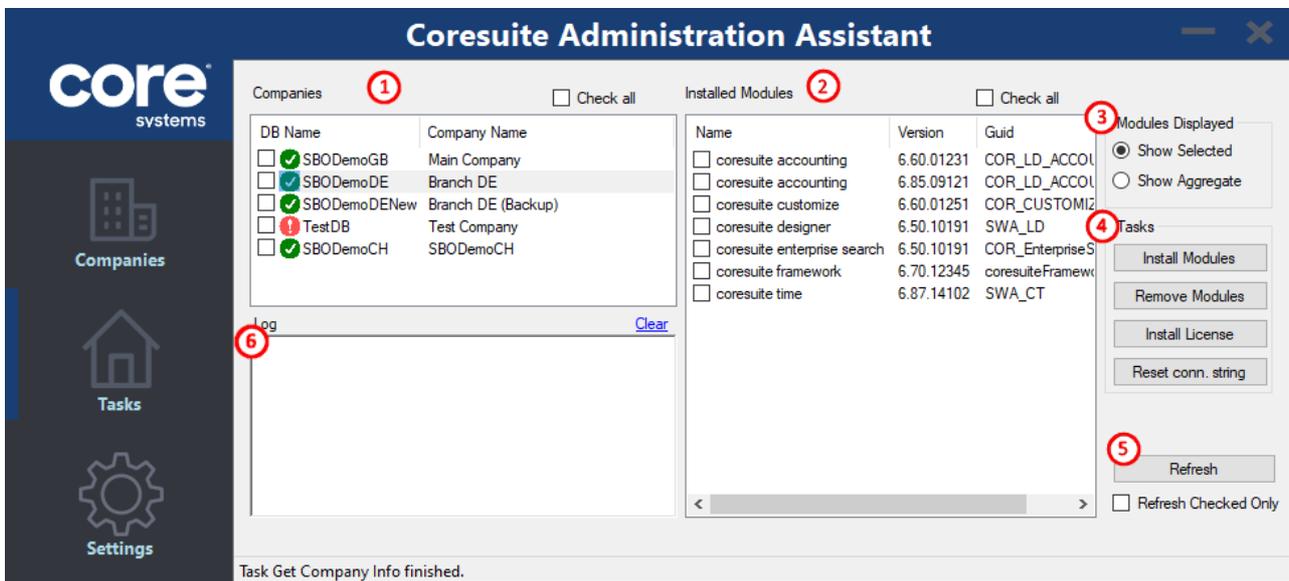
Field name	Description
A. Connection Settings for the Server you want to access (The following settings are automatically filled-in from the already existing companies in your list and cannot be modified.)	
Server Type	The server/database type. List of types is taken from SAP Business One SDK.
Server Name	The name of the server. For SQL servers, the actual server name or IP address of the server is sufficient, for HANA servers, the port must also be provided e.g. 192.168.2.1:30015
DB User Name	The name of the user connecting to the database e.g. sa/SYSTEM or the alternative sa/SYSTEM user.
DB User Password	The password for the above user.
Language	Any error messages produced by the SDK will be shown in the selected language.
Use Trusted	Use this option (SQL only) if you have configured your SQL DB Users accordingly.

B. Specify the connection details for the selected company databases	
(All fields are optional. If you leave any blanks, you will have to fill them in later for each company database as described in the Add / Remove / Edit section above)	
SBO User ID	The name of the user connecting to SAP Business One e.g. manager.
SBO User Password	The password for the above user.
Show Password	Use this option to display the SBO User Password.
Save Pre-configuration File	This option allows you to save the pre-configuration, conveniently storing it in as json file.

3.3 Tasks Tab

The Tasks tab is the "heart" of Coresuite Administrator Assistant.

When starting the application, it focuses directly on this tab. The application automatically loads the last list of company databases and starts refreshing the company info(s).



1 Companies

This section of the screen displays the list company databases that are currently available to work with. The displayed list is in sync with the "Companies" list in the "Companies" tab.

2 Installed Modules

This section of the window displays all modules/sips included in the currently SELECTED company database **OR** the aggregate of all modules/sips included in all CHECKED company databases. This is controlled by the "Modules Displayed" option.

3 Modules Displayed

- "Show Selected" only displays all modules/sips in the currently SELECTED company database.
- "Show Aggregate" displays all modules/sips in all CHECKED company databases.

4 Tasks

This section displays the various tasks that can be performed for all CHECKED company databases.

- [Install Modules](#)
- [Remove Modules](#)
- [Install Licence](#)

Additional windows appear for each task when selected.

- 5 Refresh
Use the "Refresh" button to manually re-run the connection settings check and to refresh all company details. To narrow the list of where the refresh should be applied, choose "Refresh Checked Only".
- 6 Log
When a task runs, all relevant information is displayed in this section including timestamps.
- 7 Status bar
The status bar indicates the general progress of any task.

NOTE

	SELECTED company database - company database highlighted in the "Companies" list
	CHECKED company databases - company database in the "Companies" list marked with a tick.

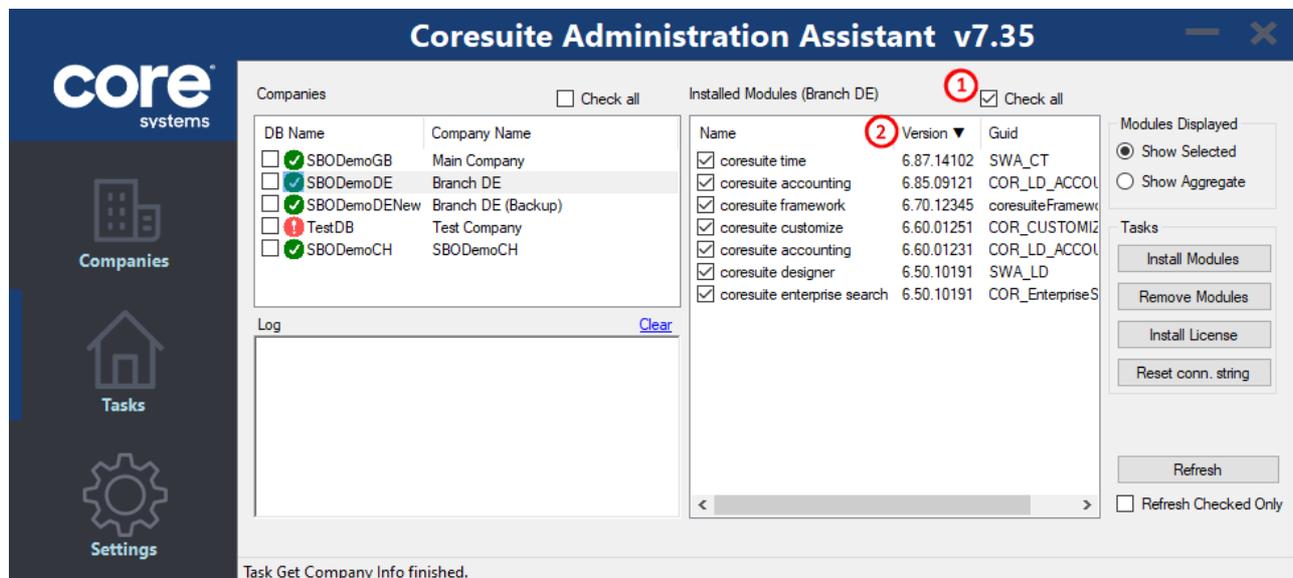
3.3.1 Checking and Sorting

You can check multiple companies and/or multiple modules at the same time.

1. If you want to check/uncheck all, use the respective checkboxes.
In the screenshot below, the "Check all" checkbox has been clicked.

By double clicking on a module, all the modules in the list with the same GUID will be checked/unchecked.

2. You can also sort modules by any column by clicking on the column header.
In the screenshot the modules are sorted by Version descending. This is also indicated by the down arrow in the column header.



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Companies Check all

DB Name	Company Name
<input checked="" type="checkbox"/> SBODemoGB	Main Company
<input checked="" type="checkbox"/> SBODemoDE	Branch DE
<input checked="" type="checkbox"/> SBODemoDENew	Branch DE (Backup)
<input type="checkbox"/> TestDB	Test Company
<input checked="" type="checkbox"/> SBODemoCH	SBODemoCH

Log [Clear](#)

Installed Modules (Branch DE) Check all

Name	Version	Guid
<input checked="" type="checkbox"/> coresuite time	6.87.14102	SWA_CT
<input checked="" type="checkbox"/> coresuite accounting	6.85.09121	COR_LD_ACCOU
<input checked="" type="checkbox"/> coresuite framework	6.70.12345	coresuiteFramew
<input checked="" type="checkbox"/> coresuite customize	6.60.01251	COR_CUSTOMIZ
<input checked="" type="checkbox"/> coresuite accounting	6.60.01231	COR_LD_ACCOU
<input checked="" type="checkbox"/> coresuite designer	6.50.10191	SWA_LD
<input checked="" type="checkbox"/> coresuite enterprise search	6.50.10191	COR_EnterpriseS

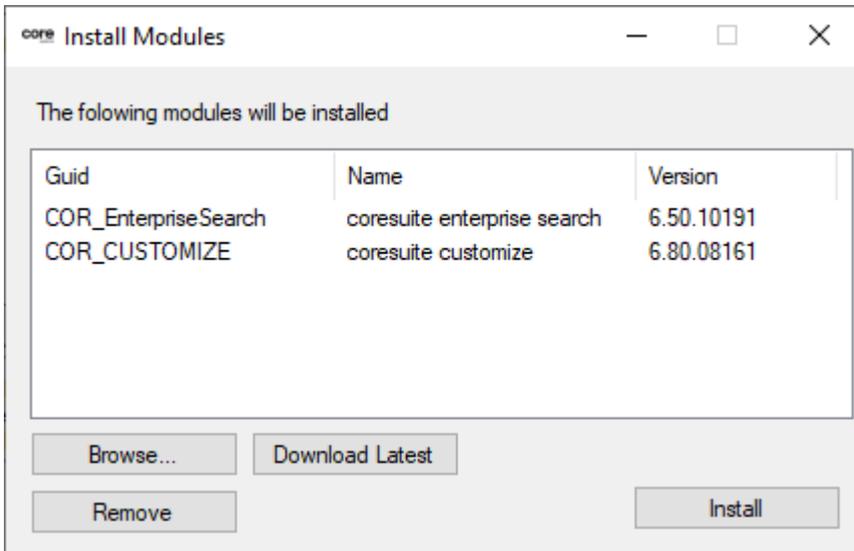
Modules Displayed
 Show Selected
 Show Aggregate

Tasks
 Install Modules
 Remove Modules
 Install License
 Reset conn. string
 Refresh
 Refresh Checked Only

Task Get Company Info finished.

3.3.2 Install Modules

To install any modules/sips, start by checking the required company database(s) in the "Companies" List and proceed by clicking on the "Install Modules" button. The following screen appears:



You can do both, browse to the directory where your modules/sips are located, and download the latest versions of our official modules to add them to the list of modules/sips to be installed. Before using the "Install" button, you can also modify this list by using the "Remove" button.

All modules/sips in the above list will be imported and marked as 'To Install' across all checked company databases.

NOTE



The actual "installation" is only completed, once you (re-)start the Coresuite addon in the respective database.

3.3.3 Remove Modules

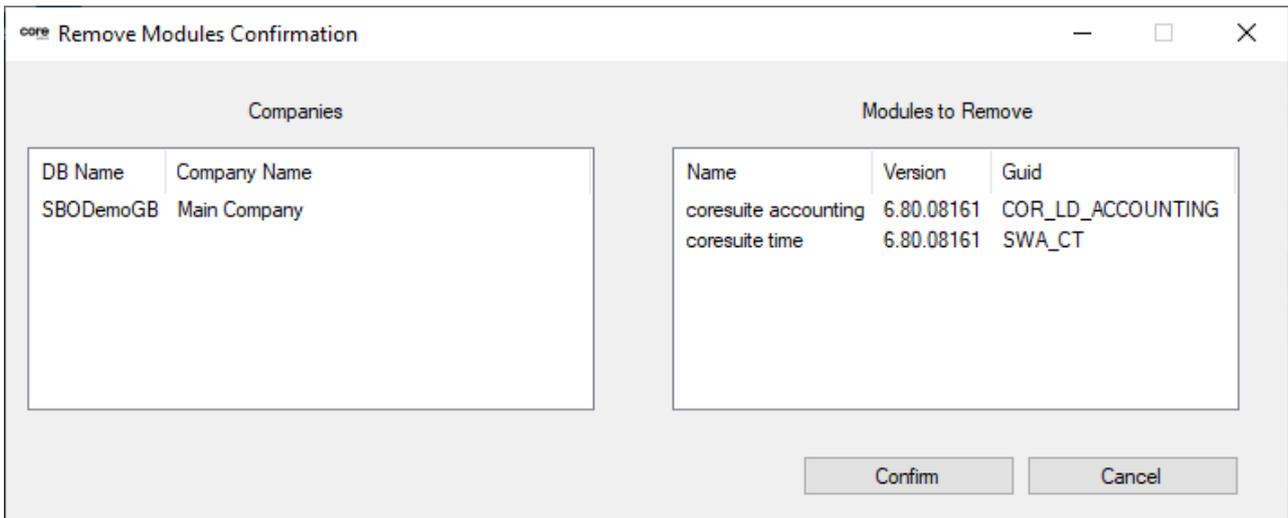
This option can be used for both: downgrading module(s)/sip(s) or completely removing a module(s)/sip(s).

For downgrade or remove module(s)/sip(s) from a single company database, follow the steps described in section [Remove/Downgrade module\(s\)/sip\(s\) - Single Database](#).

For downgrade or remove module(s)/sip(s) from multiple company databases, follow the steps described in section [Remove/Downgrade module\(s\)/sip\(s\) - Multiple Databases](#)

3.3.3.1 Remove/Downgrade module(s)/sip(s) - Single Database

To remove/downgrade any modules/sips, start by checking the required company database in the "Companies" List. Check the relevant rows in the "installed Modules" list and proceed by clicking the "Remove Modules" button. The following screen appears:



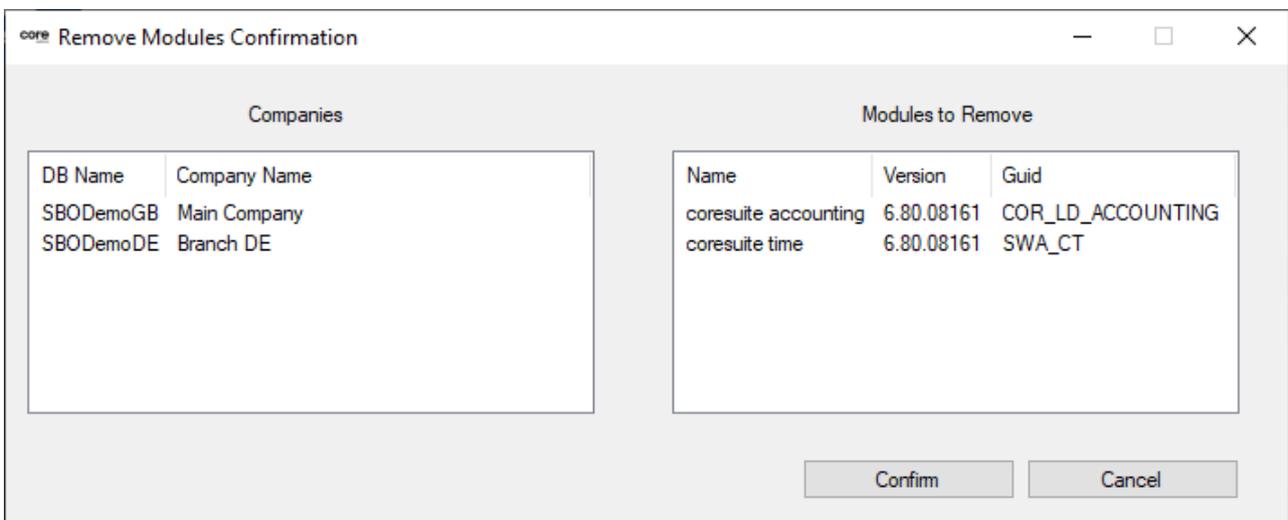
The screen displays the checked company database and the checked module(s)/sip(s) to be removed. Upon confirmation, the checked module(s)/sip(s) are removed from the checked company database.

NOTE

	The actual "Remove/Downgrade" is only completed, once you (re-)start the Coresuite addon in the respective database.
--	--

3.3.3.2 Remove/Downgrade module(s)/sip(s) - Multiple Databases

To remove/downgrade any modules/sips, start by checking the required company databases in the "Companies" List. Check the relevant rows in the "installed Modules" list and proceed by clicking the "Remove Modules" button. The following screen appears:



The screen displays the checked company databases and the checked module(s)/sip(s) to be removed. Upon confirmation, the checked module(s)/sip(s) are removed from the checked company database. As not all module(s)/sips(s) checked might be present in each of the checked databases, the application verifies where they are included and removes them accordingly.

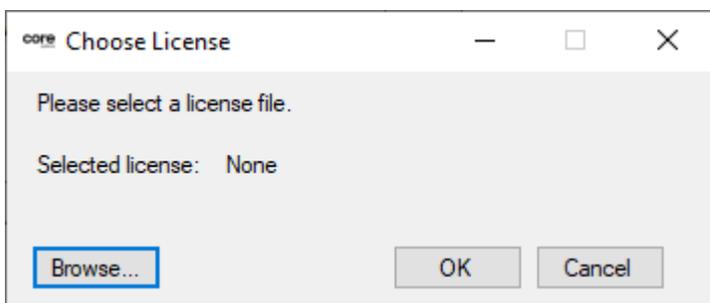
NOTE

 The actual "Remove/Downgrade" is only completed, once you (re-)start the Coresuite addon in the respective database.

3.3.4 Install Licence

This task allows for the installation of the Coresuite licence file in multiple company databases at once.

Check all the required company databases and click "Install License".
The following screen appears:



Browse for the licence file and click "OK".
The licence file will be added in all checked company databases.

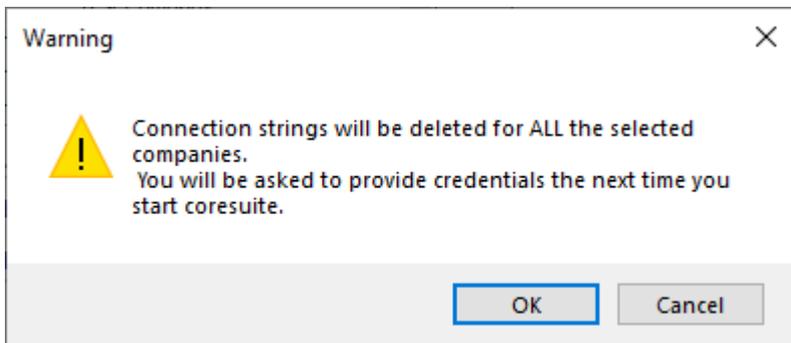
NOTE

 It is currently not possible to automatically download any licence file from within this application. Please download the licence file manually from our Licence Portal or use the file you received per email.

3.3.5 Reset Connection String

This task allows for the reset of the Connection String in multiple company databases at once.

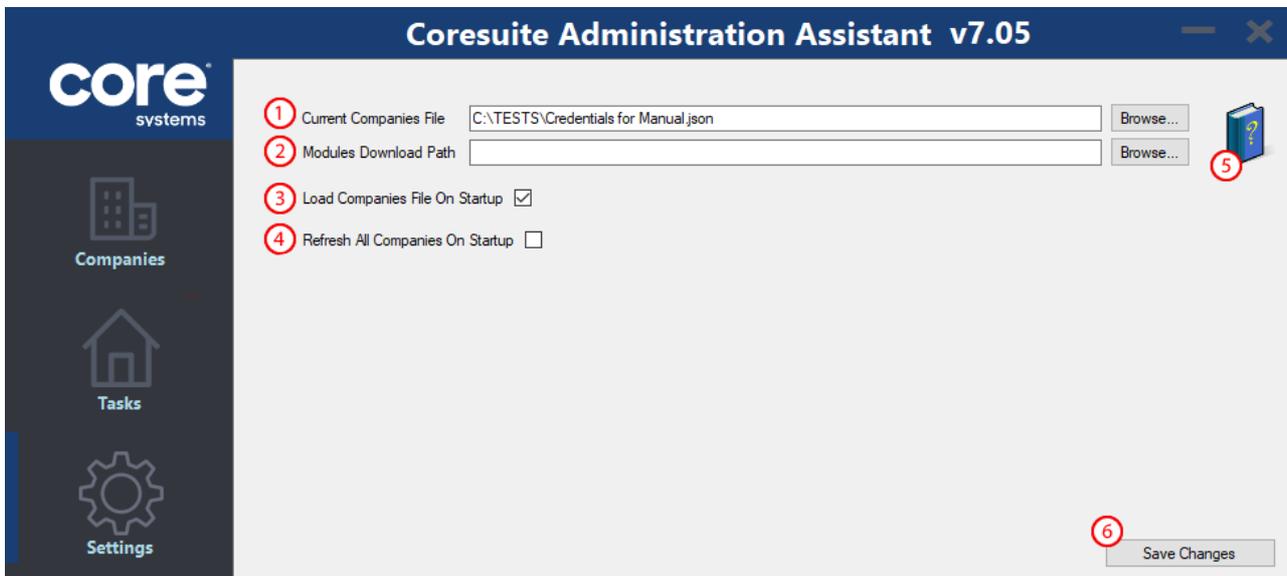
Check all the required company databases and click "Reset conn. string".
The following screen appears:



Click "OK" to proceed.
Please note that this task essentially deletes the ODBC credentials which are stored in table @SWA_SWA_CONF

3.4 Settings Tab

The Settings tab provides a number of options to define how the application behaves. There are currently three settings available for users to change.



- 1 Current Companies File**
This is the path to the currently loaded json file. Use this path to specify from where the json file should be loaded upon Startup.
- 2 Modules Download Path**
This is the default path where modules are downloaded. If left empty, the temp folder is used.
- 3 Load Companies File on Startup**
If this is checked, the above file is automatically loaded upon startup. If unchecked, the Companies list will be blank on Startup.
- 4 Refresh All Companies on Startup**
If this is checked, the company databases loaded on startup are automatically refreshed. This will take a moment but after that all information about the company databases will be up-to-date and readily available.
- 5 Manual Icon**
Click here to open the manual for CAA.
- 6 Save Changes**
Changes made to the settings above can be saved by pressing this button.



CONTACT

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