

CAS genesisWorld x14 Installation and setup





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1 Before you start

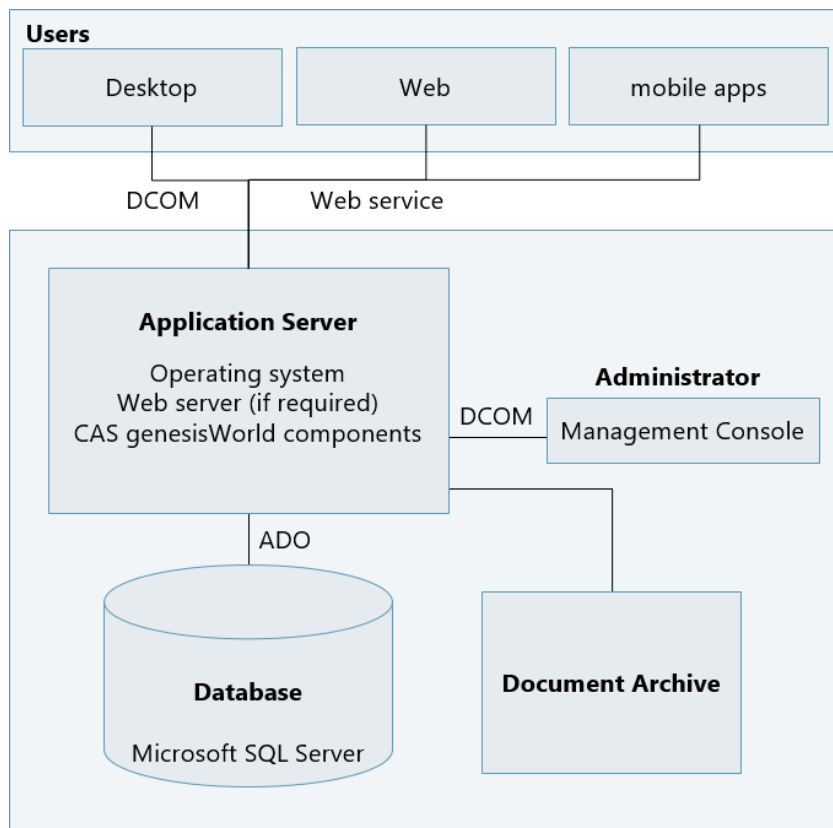
This manual explains the essentials for administrators. The second manual, "First Steps", explains the basic functions and deployment of CAS genesisWorld to help users manage their customers and their own organization.

If you have any further questions, please refer to the following sources for more information:

- Most of our CAS genesisWorld programs offer online help pages that you can open with the F1 key or the respective button.
- On the Internet, at <https://www.cas-crm.com/service-support/support/knowledge-database.html> you find the most frequently asked questions including the answers.
- If you could not find the answer to your questions here, then please contact your CAS partner for more information. If your questions could not be answered, please inform yourself at your CAS partner.

1.1 CAS genesisWorld architecture

The figure explains the client-server architecture including the different CAS genesisWorld components.



To avoid ambiguity, when referring to **computers** in this manual we mean hardware, and when referring to **servers** we mean software.

- Users work with CAS genesisWorld Desktop, CAS genesisWorld Web or the CAS genesisWorld SmartDesign Mobile App. The CAS genesisWorld SmartDesign Mobile App client consists of 3 mobile apps for the iOS, Android and Windows operating systems. The names of the clients are used in abbreviated form here in the manual.
- As administrator, you mostly work with the following clients:

In the Management Console, you define defaults and user accounts and administer licenses.

Using the database wizard you manage an application server connection to one or more databases of a database system and create a folder for the document archive.

Using the Server Manager, you manage application server services, monitor the connection to the database, and set up a reverse proxy or load balancing to name but a few.

Communication between components

The desktop clients communicate with a CAS genesisWorld Application Server via the RPC service using the DCOM protocol (Distributed Component Object Model). This also applies to the connection between the Application Server and the Management Console.

The Application Server accesses the database using ADO (ActiveX Data Objects).

The communication between an application server and CAS genesisWorld Web as well as the Mobile Apps for CAS genesisWorld is enabled via a web service.

1.2 Editions, modules, and extensions

CAS genesisWorld is available in different editions. The Standard Edition offers central functions for relationship and information management. Further editions offer combinations of modules for various industries or specific company requirements.

As extensions of CAS genesisWorld, modules offer functions, for example, for finding and resolving duplicates, creating and managing receipts, or order and project management.

CAS genesisWorld can still exchange data with other systems. This includes existing interfaces, for example, to the telephony system, Microsoft Outlook or Microsoft Word. And it also includes interfaces for a paid module and/or integration, for example, for an ERP (Enterprise Resource Planning) system or to exchange data for a marketing tool via e-mail.

For extensions, user guides or online help pages are available, which describe the respective functions and features in more detail for administrators and users.

This manual explains the basics. On the [CAS genesisWorld knowledge hub](#) page, you will find links to all available CAS genesisWorld documents. For more information on the various editions and extensions, please contact your CAS Partner.

2 Requirements and planning

We recommend the following order if you are installing CAS genesisWorld for the first time:

- ✓ Install a database system.
- ✓ Plan the configuration depending on your requirements:
 - Number of users
 - The number and type of clients: Desktop client, CAS genesisWorld Web and Mobile Apps
 - How you want to use CAS genesisWorld
 - Hardware and software requirements
- ✓ Prepare your network for the document management folders and for the document archive and create a Windows user account for the Application Server.
- ✓ Install CAS genesisWorld.
- ✓ Schedule the distribution of the software updates with the update service. Once you have configured the first update service, you can update more application servers and desktop clients using this service.
- ✓ Define services and settings in the Server Manager, for example, for CAS genesisWorld Web.
- ✓ Use the CAS genesisWorld Database Wizard to create a CAS genesisWorld database.
- ✓ Plan the assignment of rights for users, groups and functions.
- ✓ Enter the licenses in the Management Console, create the user accounts, groups and resources as well as the defaults in the Management Console.

Please contact one of our CAS Partners if you require custom planing and configuration to your needs. For information about CAS Partners, partner solutions and partners in your area, go to our website at www.cas-crm.com.

2.1 Database system

CAS genesisWorld requires a database system. If you have not installed a database system yet, we recommend that you install the database system before installing CAS

genesisWorld. To ensure better performance, install the system on a separate computer and not on the same computer as that of the application server.

For a list of database systems supported by CAS genesisWorld see the help documentation on hilfe.cas.de in [Release notes](#).

You can manage the Microsoft SQL Server using the SQL Server Management Studio. If the Management Studio is not installed automatically, we recommend installing it manually.

Microsoft SQL Server requirements

- The Microsoft SQL server can be installed with either a case-sensitive or case-insensitive sort order. CAS genesisWorld always requires the case-insensitive character set.

The Microsoft SQL Server must be set up so that the case-insensitive character set is used automatically as the settings of the Microsoft SQL Server are the fallback values for the creation of a new database.

- You need administrator rights to the database system for CAS genesisWorld to create a new database. You can set up the database connection by either using Windows authentication or a database user.

If you set up the database connection using a database user, the database user must have at least ownership rights (**db_owner**) to the database.

- Do not rename the Microsoft SQL Server or the corresponding computer during operation. You can only rename the server if you reinstall the Microsoft SQL Server.

2.2 Planning the configuration

A full installation of CAS genesisWorld can be made on a single computer as **single user installation** with a database system, at least one database and an application server and a desktop client.

When planning a **multi-user operation**, you distribute the database system and the database as well as one or several application servers on several computers and thus define the configuration of CAS genesisWorld.

2.2.1 Multi-user operation

The following questions should be considered for a multi-user operating system:

- How many CAS genesisWorld components are deployed: for example, desktop client, CAS genesisWorld Web, Mobile Apps, more than one database?
- How many third-party systems are used, for example, ERP, Exchange or Evalanche?

- How many users use clients, third-party systems and how intensively?

A high workload can also result, for example, from intensive use of the notification and action service or replication with multiple databases.

- Do users often work with archive files, such as Microsoft Word documents, Microsoft Excel tables, graphic files, and so on?

Depending on your answers, we recommend the following:

- We recommend using multiple application servers in case of high capacity utilization.
- The database system and one or several application servers can be distributed on several computers.
- If you want to manage a lot of documents in CAS genesisWorld, we recommend you set up the Document Archive on a computer other than the database computer or the Application Server.
- We recommend you do not install third-party systems that use high storage or processor capacity, such as e-mail servers or ERP systems, on the same computer on which you install the CAS genesisWorld Application Server.
- CAS genesisWorld Web, Mobile Apps and modules such as Helpdesk or Survey online can be accessed externally. Thus, due to data protection reasons, we recommend that you set up a separate and protected application server.

For more detailed information about the modules, please refer to [System requirements](#):

- Hardware requirements for the individual components
- Parameters for application and database servers by number of users
- Example configuration

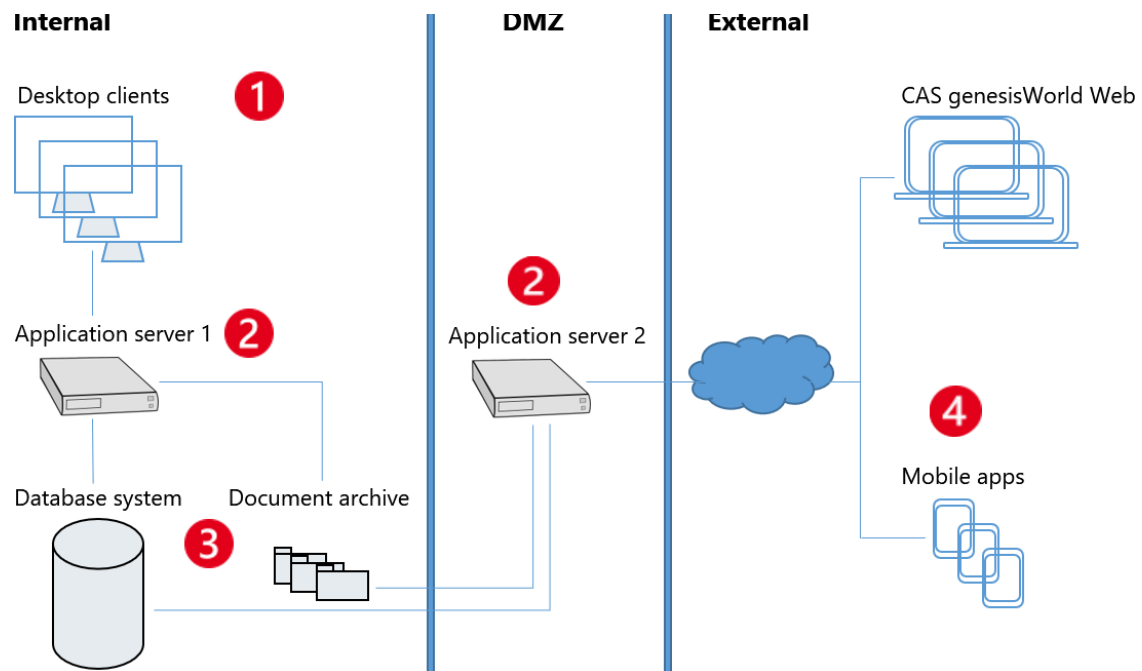
2.2.2 Example scenario for server and clients

The figure illustrates the basic scenario with a configuration with internal and externally accessible clients.

The following areas are distinguished initially: **Internal** in the company's network, **DMZ** (Demilitarized Zone) with controlled access for security reasons, and **External** with the clients that access CAS genesisWorld outside the network.

- 1 In the internal network, desktop clients are installed locally on users' computers.
- 2 Application server 1 is installed on a separate computer.

Application server 2 is installed on a separate computer in the **DMZ** (Demilitarized Zone) area. Depending on your requirements, the services for CAS genesisWorld Web and/or the Mobile Apps are activated on this application server. Portals such as Helpdesk, Survey or Event Management can be installed on this computer. Instead of one you can also use more application servers respectively.



- 3 The database system and the document archive are each installed on a further computer, which is accessed by application server 1.

The application server 2 accesses, secured through the **DMZ** area, the database and the Document Archive directly.

For the application server 2, you must set the required ports for the deployed clients and modules.

By deploying a reverse proxy, security settings for the externally accessible application server can be made.

? Online help Server Manager: [Using a reverse proxy](#)

- 4 In the **External** area, users of CAS genesisWorld Web, Mobile Apps or other portals log on to the application server 2.

Users of CAS genesisWorld Web, Mobile Apps or other portals access the database and the Document Archive via application server 2.

2.2.3 Hardware and software requirements

Binding specifications without knowledge of the requirements are difficult. For special system environments stricter requirements may apply, for example, for remote desktop servers and terminal servers.

Please refer to the [Release notes](#) document on hilfe.cas.de for more detailed information on the supported operating systems, supported software components of CAS genesisWorld, versions of the available and supported third-party systems, and more. Known limitations are also described in the document.

CAS genesisWorld can only be installed on released operating systems.

You need the Microsoft Internet Information Services (IIS) if you deploy modules with websites, for example, teamWorks, Helpdesk online, Survey online, or Event online. On some operating systems, the Microsoft IIS are not installed by default and must be installed manually.

In multi-user operation, the server versions of the respective Windows operating system must be used for the application servers.

2.3 Network preparations

Please consider the following points when configuring a multi-user operation in the network:

- You will need a specific Windows user account for the application server.
- With CAS genesisWorld Web and the Mobile Apps, users can actively access archive files that are saved in the Document Archive of CAS genesisWorld.
- The CAS genesisWorld components such as the application server, desktop client, document archive or portal files (e.g. for Helpdesk) are stored in dedicated folders.

2.3.1 Windows user for the Application Server

A personal Windows user account is required for registering the Application Server if you deploy CAS genesisWorld in the network.

The user account must have local administrator rights to the computer on which you set up the Application Server.

By using this account, you ensure that the application server remains active, even if no Windows user is otherwise logged on to the computer with the application server. Otherwise, the Application Server is shut down after the last Windows user has logged off.

Additionally, the user account is needed to access the Document Archive. Other user accounts should not have access to the CAS genesisWorld Document Archive folder.

The Document Archive can be located on a different computer than the application server. Then the user account for the Application Server must also be granted access rights to the computer with the folder for the Document Archive.

You do not need a separate Windows user for a single-user installation.

2.3.2 Document management of archive files

So-called archive files are, for example, Microsoft Word documents, Microsoft Excel tables, graphics or PDF files. An archive file can be any file that is created and edited on a computer with any program.

Archive files in CAS genesisWorld are managed in meta document data records by establishing an invisible link to the respective file. Document data records are stored in the database. Archive files are usually stored in the Document Archive.

The Document Archive is a protected folder which only the application server can access and which is set up in the database wizard, see chapter "CAS genesisWorld architecture" on page 6. Archive files are always accessed via CAS genesisWorld. Thus, user access rights are taken into account, changes to the document data record are logged, and access to an archive file is only possible via CAS genesisWorld.

Archive files can also be saved as file references in the desktop client. This is not possible in CAS genesisWorld Web and the mobile apps. There are a number of reasons why we do not recommend saving as a file reference, particularly because access to an archive file is not possible via the Internet.

Please note

The Document Archive can become very large. When installing, you should ensure that the corresponding hard drive is equipped with enough free memory. If your Document Archive requires a lot of memory, we do not recommend that you set up the Document Archive on the same computer as the database or the Application Server.

The path for the Document Archive can be changed with the Database Wizard, for example, if the archive is to be moved.

When deploying several application servers, all application servers must be able to access the same Document Archive, that is, the same folder.

When deploying several databases or tenants, we recommend that you set up a separate Document Archive for each tenant.

We do not recommend merging several Document Archives. Document archives are almost impossible to separate.

2.3.3 Installation folders

CAS genesisWorld is installed in several folders by default.

Application server

- ..\Program Files (x86)\CAS-Software\CAS genesisWorld\Client
Desktop client, Management Console, DocumentPort

- ..\Program Files (x86)\Common Files\CAS-Software\Server\JavaServices
Files, for example, for CAS genesisWorld Web, Mobile Apps, SmartSearch or Open sync.
- ..\Program Files (x86)\Common Files\CAS-Software\Server
Files for the Application Server and the Server Manager, Configuration wizard for the update service.
- ..\Program Files (x86)\Common Files\CAS-Software\UpdateService
Files for the update service.
- ..\Program Files (x86)\Common Files\CAS-Software\DBAssistant
Files for the Database Wizard.
- ..\Program Files (x86)\Common Files\CAS-Software\Web
Dashboards for the CAS genesisWorld Desktop Client.
- ..\Program Files (x86)\CAS-Software\CAS genesisWorld\ClientInstallation
Installation files for the CAS genesisWorld Desktop Clients.

This folder is configured as default for the update service and cannot be changed for the update service in the configuration wizard.

Document archive

You can select any folder as the Document Archive. The selected folder does not need to be located on the same computer on which the Application Server is installed. When you execute a software update, the preset folder for the Document Archive remains unchanged.

- ..\Program Files (x86)\CAS-Software\genesisWorld\Archive
Suggested folder for the Document Archive on the computer on which you install the Application Server.
- ..\Program Files (x86)\Common Files\CAS-Software\Server\Archives_Archives
Folder containing example files for the Document Archive. This folder is always created during the installation of an Application Server.

Desktop client

- ..\Program Files (x86)\CAS-Software\CAS genesisWorld
Suggested folder for the desktop client. You can select any folder for this purpose.
- ..\Program Files (x86)\CAS-Software\CAS Word Add-In
Folder for the Microsoft Word Add-In.

- ..\Program Files (x86)\CAS-Software\CAS Outlook Add-In
- Folder for the Microsoft Outlook Add-In.
C:\Program Files (x86)\CAS-Software\CAS Smart Add-on
Folder for the CAS Smart Add-on.

2.4 Specific programs and special considerations for modules

The following CAS genesisWorld programs are available.

Programs for users

- The CAS genesisWorld **Desktop Client** is only available for Microsoft Windows.
The desktop client is installed on both the client computers and the Application Server.
- **CAS genesisWorld Web** is automatically installed with the Application Server.
- Each user can install a mobile app on their mobile device. The apps can be found in the respective App Store of the mobile device and are available in the **CAS genesisWorld SmartDesign** group.
- Using the **CAS Word Add-In**, users can write Microsoft Word form letters by making use of CAS genesisWorld data.

The CAS Word Add-In is installed automatically with the Desktop Client if you work with the configuration wizard. The CAS Word Add-In is not automatically installed via MSI. A manual installation is possible, if users, for example, only deploy CAS genesisWorld Web.

- With the **CAS Outlook Add-In**, different functions for the interplay of Microsoft Outlook and CAS genesisWorld are possible, for example, archiving e-mails and attachments, transferring contacts, tasks and appointments, as well as responding to appointment invitations.

The CAS Outlook Add-In is automatically installed with the desktop client if you deploy the configuration wizard. The CAS Outlook Add-In is not installed automatically via MSI. A manual installation is possible, if users, for example, only deploy CAS genesisWorld Web.

The Add-In is also available for Office 365. This version is not installed automatically and can be downloaded from the Microsoft AppSource store.

- The **CAS Smart Add-on** is required to work with the telephony integration and when editing CAS genesisWorld Web archive files.

Users can download and then install the add-on from the **Settings** app in CAS genesisWorld.

- With the **CAS genesisWorld DocumentPort**, several files are adopted as document data records at once to CAS genesisWorld. The files are saved as archive files in the Document Archive.

The DocumentPort is automatically installed along with the CAS genesisWorld Desktop Client and is available both on the client computers and the Application Server.

Programs for administrators

- The CAS genesisWorld **Management Console** should not be installed on the same computer as the application server.

In the Management Console, the administrator defines, for example, user accounts or rights, and sets defaults for user accounts. These settings are made in the database and you define them when logging on to the Management Console. When deploying several databases or tenants, the settings for each database must be made separately.

If several application servers are connected to a database, the settings for the connected database in the Management Console can be defined via any application server. When logging on to the Management Console, select the application server and the database.

- With the Server Manager, you register CAS genesisWorld, define settings for the application server, monitor the connection to the database, and so on.
- Use the Database Wizard to create and manage a database for CAS genesisWorld with the deployed database system.
- With the Configuration wizard, you can configure the CAS genesisWorld update service and systematically keep them up to date.

When deploying several application servers, the database and the Document Archive must be connected via the Database Wizard. The relevant services can be activated via the Server Manager.

The Database Wizard and the Server Manager should always be opened on the application server for which you want to define the settings. Both programs open directly without a logon window for the current application server and the currently connected database.

Extensions and modules

In most cases, modules do not require a separate installation, but are automatically installed along with CAS genesisWorld and are activated by entering the corresponding licenses.

When working with portals and modules, a separate installation is required for, for example, Helpdesk, Event online or Survey online. A separate setup must be installed and configured.

For further information, please refer to the corresponding user guides on [CAS genesisWorld knowledge hub](#).

3 Installing CAS genesisWorld

The installation works the same for different editions.

- ✓ Start the **setup.exe** file on the computer on which you want to install CAS genesisWorld programs.
- ✓ Select the language for the installation wizard.

The system now checks if further elements are needed for CAS genesisWorld, for example, Crystal Report Viewer to display reports or specific drivers for the CAS genesisWorld application server.

Missing elements on the computer are automatically installed.

- ✓ Click **Install**.

The installation wizard is started. During the process, the wizard checks whether there is enough space on the hard drive for the selected installation.

After the installation, additional memory space is required for CAS genesisWorld, for example, for the Document Archive, see chapter "Document management of archive files" on page 13.

- ✓ Click **Next**.

The individual installation steps are described on the following pages.

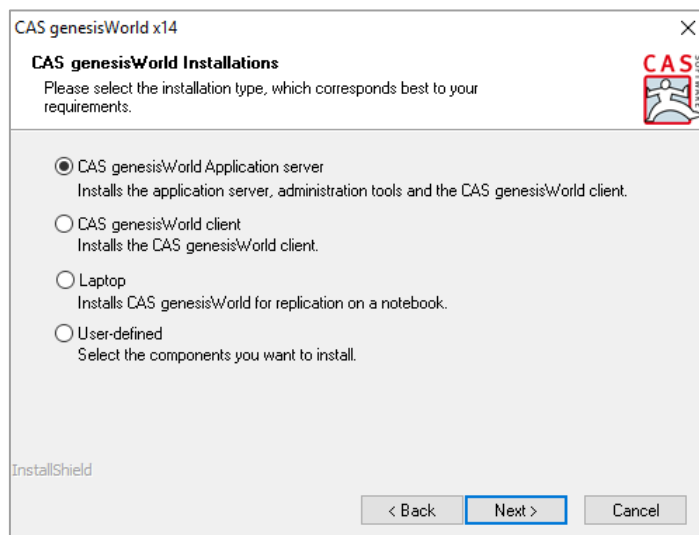
3.1 Selecting the setup type

Depending on the setup type, different programs are installed on the computer.

CAS genesisWorld Application Server

If you select the **CAS genesisWorld Application Server** option, all CAS genesisWorld programs are installed in the computer.

This variant is best suited for Application Servers or a single-user installation.



CAS genesisWorld Client

If you select the **CAS genesisWorld client** option, you install a desktop client and the Management Console.

After you have clicked **Next**, the **Select application server** page opens. On this page, you enter the name of the computer or the IP address of the Application Server.

Laptop

The **Laptop** option is only relevant if you are using the replication function.

[? User guide replication](#)

User-defined

After having selected the **User defined** option, you can decide which CAS genesisWorld components you want to install.

If you select the user-defined installation, the Management Console and the update service are always installed.

- **Windows client**

The **Client program files** include the desktop client, the Management Console, and the update service. The **Client program files** option cannot be deactivated if you have selected the **Windows client** option.

- **Application server**

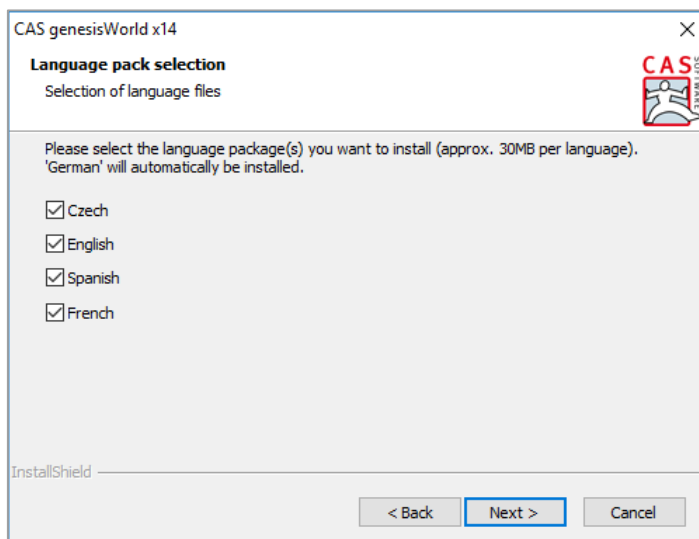
You cannot deactivate the **Server program files** option. Those files include all program files which are necessary for the Application Server. This also includes the Server Manager.

The **Database Wizard** is required for the connection of CAS genesisWorld with a database.

The **Client installation files** include the files that are necessary to install desktop clients on further computers.

3.2 Languages

CAS genesisWorld is delivered in multiple languages. The selected language packages are installed for all programs of CAS genesisWorld. If you do not install the language packages, CAS genesisWorld is only available in German.



You can install language packages at a later time: Install the last used installation file again and select the desired languages.

The language packages must be installed on each computer on which they are required. Additionally, you need to install the language packs on the Application Server so that the input help options can be adopted in the database.

You cannot deinstall the language packages at a later time.

3.2.1 Different languages

Once the language packages are installed, users can select the respective languages. Settings and selection options differ depending on the program of CAS genesisWorld.

- The Management Console and the desktop client are automatically started in the language that is defined in the regional and language options of the operating system. If there is no CAS genesisWorld language pack for the language of the operating system, the programs open in English.

A different language can be selected in the logon window. Alternatively, the language can be defined via parameters in both programs.

🔗 Online help for the desktop client: [Quick access to CAS genesisWorld](#)

- Server Manager, Database Wizard, and DocumentPort are opened in the language that has been selected for the desktop client. If no language was set for the desktop client, the language of the operating system is included. If the language of the operating system is not supported by CAS genesisWorld, the programs open in English.
- CAS genesisWorld Web is opened in the default language of the used browser. If there is no CAS genesisWorld language package available in the browser language, CAS genesisWorld Web is opened in English.

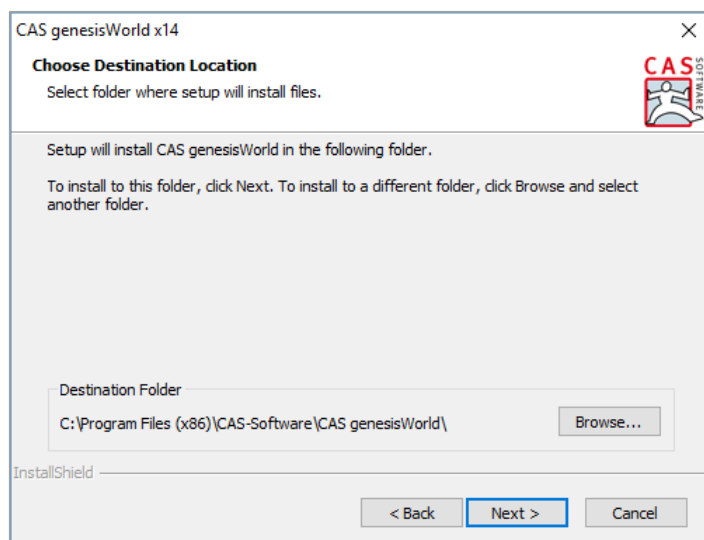
A different language can be selected in the logon window.

- The mobile apps are opened in the language of the operating system. If the language of the operating system is not supported by CAS genesisWorld, the mobile apps open in English.

A different language can be selected in the Settings.

3.3 Selecting the target path

If the installation also includes the desktop client or the Management Console, then you can change the folder for these program files, see the chapter on "Which folder are they installed to?" on page 13.



3.4 Registering the Application Server

On the **Registration of the Application Server** page of the installation wizard, you enter a Windows user who has local administrator rights on this computer. We recommend using a personal user account, for example, CASuser.

CAS genesisWorld x14

Registration of the application server
Please select how to register the CAS genesisWorld-Server.

Please enter the name and the password of a user. This account is used to run the server. Consider that this user has local administrator privileges and full rights on the document archive.

Current user:
CASuser
Password:
●●●●●●●●●●●●●●●●●●●●●●

InstallShield

< Back Next > Cancel

If you work in a network with multiple domains, you must additionally enter the name of the respective domain. The domain is always separated from the user name using a backslash and entered as follows: **domain\user**.

After the installation, you can change the user account which has been entered in the **Server Manager**.

3.5 Proxy settings

CAS genesisWorld x14

Proxy settings
Please enter if you use a proxy server

If you access the internet through a proxy server, please enter the server address and port in the boxes below.
You can change these settings later in the Management Console in the Miscellaneous area.

Use a proxy server

Proxy server: Port:

Authentication data (optional):
User name:
Password:

InstallShield

< Back Next > Cancel

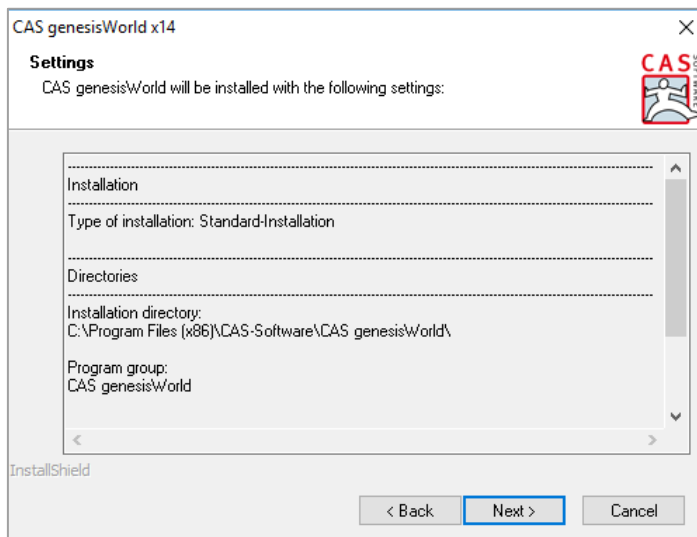
If you are using a proxy server for the application server services to access the internet, you enter the proxy server data in this step.

The proxy server is used for all services and functions for which CAS genesisWorld needs access to the internet. Such services and functions include, for example, the Unternehmensverzeichnis directory, geo-referencing, and the address wizard. You can change the settings for the proxy server after the installation.

🔗 Online help Management Console: [Connections](#)

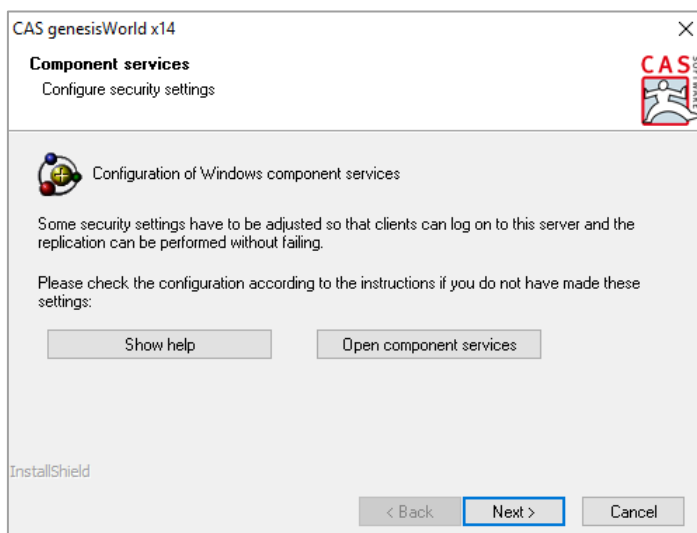
3.6 Summary of settings

All of your previously entered setup information is displayed on the **Summary of settings** page.



3.7 Component services

After the selected programs have been installed, you can define the component services settings for the Application Server.




You need to define the component services settings, so that desktop clients and the Management Console can log on to the Application Server.

- ✓ Using the **Open component services** button, you open the settings for the Windows component services.
- ✓ Using the **Show help** button, you open the corresponding help page in the online help pages of the Management Console.

Please note

The connection between the desktop client and the CAS genesisWorld Application Server is established via the DCOM protocol (Distributed Component Object Model). For this purpose, the RPC (Remote Procedure Call) interface is used.

The settings for the component services of the operating system are also required if the Management Console and desktop clients are to access the application server via the network and eventually across domains.

 Online help Management Console: [COM connection: Required settings](#)

3.8 Finishing the installation

You can only make changes to an existing installation of CAS genesisWorld by directly calling the **setup.exe** file.



After you have installed CAS genesisWorld for the first time, you need to create a new database for CAS genesisWorld. You create a database using the Database Wizard, which you can start in the last installation step.

After a CAS genesisWorld update, you may have to update the database. The update is performed in the Database Wizard.

- ✓ Activate the **Start database wizard** option if you want to create, connect, or update a database for CAS genesisWorld.

3.8.1 I cannot activate the Application Server

Sometimes, after finishing the installation, the "Application Server could not be activated on the ... computer" message appears.

This message can also be displayed if the CAS genesisWorld Application Server has been shut down or users cannot log on using the desktop client.

In this chapter, you can find possible causes and troubleshooting tips.

Checking DCOM settings

CAS genesisWorld uses the DCOM protocol and the RPC interface. Therefore, you must define settings for the component services on the computer on which an application server runs.

- ✓ Open the **Component Services** in the Windows administration on the computer with the Application Server.
- ✓ Open the properties of **My Computer** in the **Component Services** window.
- ✓ Open the **Default Protocols** tab and check whether the **Connection-oriented TCP/IP** entry is at the top of the list.

The order of the listed protocols is relevant to Windows and therefore the connection-oriented TCP/IP protocol, which is important for CAS genesisWorld, must be located at the top of the list.

- ✓ Via the **Properties** of the protocol, you can limit the area for the DCOM port to which a server responds on the server side.

When logging on to CAS genesisWorld, a DCOM connection is requested at port 135. However, the server replies at any port. With the defined settings, you can prevent a random server reply. The server can thus be accessed in spite of a firewall.

Please keep in mind during planning that a desktop client can require about 3 to 10 DCOM connections.

- ✓ On the **COM Security** tab, you can adjust the access permissions as well as the launch and activation permissions.

🔗 Online help Management Console: [COM connection: Required settings](#)

Any changes made to the component services will require you to re-start your computer.

Checking the firewall

Check whether your firewall blocks access to the Application Server.

3.9 Prepare productive deployment

For you to be able to set up CAS genesisWorld, several steps must be taken.

3.9.1 Setting up the database

CAS genesisWorld requires a database. To be able to set up the database, a database system must be installed, see chapter "Database system" on page 8.

You create the CAS genesisWorld database in the Database Wizard. You also use the Database Wizard to make changes to the database, see chapter "The Database Wizard" on page 42.

✓ Open the Database Wizard on the Application Server.

 Click **New database**.

The individual steps of creating a new database are described on the following pages.

User information

On the **User information** page, you enter the **Name** of the contact person for CAS genesisWorld in your organization and the name of the **Company**. This information is saved along with the licenses information.

Licensing

✓ Select the **Trial version (60 days runtime)** if you choose to test CAS genesisWorld or wish to enter the licenses later.

✓ If you select **Full version** or **Laptop version**, you subsequently enter the serial number.

The **Laptop version** option is only relevant if you use the replication function and have installed CAS genesisWorld on a laptop.

Users with the respective permission activate the licenses after the database was configured in the Management Console, see chapter "Activating licenses", on page 27.

Accessing the database

On the **Access to database** page, you enter the data of the database computer.

✓ In the **Name of database computer** field, you enter the name of the computer on which your database system has been installed.

If you are using database instances, you need to include the instance information as follows: **computer\instance**.

CAS genesisWorld database wizard

Access to database

To establish a database connection, the database system must be properly installed and started.
If required, enter the name of the computer with the installed database in the following format: "ComputerName\Instance".

Name of database computer

Use Windows authentication ⓘ

User name

Password

- ✓ You can log on to the database system using either your **User name** and **Password** or, alternatively, you can enable the **Use Windows authentication** function.

When logging on with the Windows authentication you use the Windows user that has been entered for the Application Server to log on to the database system.

In both cases, the required permissions for the Microsoft SQL Server must exist in the user account.

- ⓘ Online Help Database Wizard: [Connecting the database](#)

Document archive

On the **Document Archive** page, select the folder in which the archive files are saved, see chapter "Document management of archive files" on page 13.

CAS genesisWorld database wizard

Document Archive

Select the folder in which you want CAS genesisWorld to store the documents.

CAS genesisWorld saves documents in the central Document Archive. Only the application server should have access to the folder of the Document Archive. CAS genesisWorld users do not need access. Make these settings in the Windows release and access rights administration. Click "Next" to select the displayed folder. In order to select another folder, click "Browse...".

Target folder

Creating a database

On the **Create database** page, you enter information for the database.

- ✓ Enter a **Database name**.

The database is saved under this name in the database system and the name is displayed in CAS genesisWorld.

CAS genesisWorld database wizard

Create database

Define the settings for the new database.

Enter the name of your database:

Database name

Please select the database collation:

Collation Restrict selection to accent-insensitive collations

Unicode

Please select the language for the default database entries.

- ✓ Select the **Collation** you want to use to create the database.
- ✓ If required, activate the **Unicode** option.
- ✓ Click **Finish** to create the database.

3.9.2 Activating licenses

You need a unique activation key for each CAS genesisWorld installation. This activation key is generated by CAS Software AG and does not contain customer-specific data.

You always need the activation key if you want to add or remove license numbers to/from CAS genesisWorld.

You must activate licenses within 30 days. Otherwise, you can no longer execute administrative tasks in the Management Console.



Open the **Licenses** area in the Management Console.

- ✓ Fill in the fields and select whether you want to license CAS genesisWorld as a productive system or test system.

The activation is carried out online. The Application Server sends the respective data to the registration server of CAS Software AG.

If the application server does not have access to the internet, you select **Create activation file** and send the file to your CAS Partner.

3.9.3 CAS genesisWorld Web, desktop client and Mobile Apps

CAS genesisWorld Web and the Mobile Apps do not need any additional installation, only the application server must be installed. Some settings are required in the Server Manager and in the Management Console.

When working with CAS genesisWorld Web, users require one or several released browsers and for the Mobile Apps the corresponding app for the device from the respective store.

URL for CAS genesisWorld Web

When working with a local installation, CAS genesisWorld Web can be accessed with the respective port after the installation at `http://localhost:9090/smartdesign`.

You find the URL in the `smartdesign_config.properties` file in the application server folder under `..\Program Files (x86)\Common Files\CAS-Software\Server\JavaServices\configuration`.

In the Server Manager, go to **Services > Webservice** and enter the URL in the **External URL** field. In this field, you also change the ports.


Server Manager settings

- ✓ Start the **Web Services** and **CAS genesisWorld Web** in the **Services** tab for CAS genesisWorld Web.
- ✓ For Mobile Apps, start the **Web Services** and **CAS genesisWorld Mobile Apps**.

Management Console settings

Directly after the installation, the **Administrator** user account is already set up in the Management Console. Use this user account to get a first overview about the clients for users in CAS genesisWorld.

- ✓ You can directly log on to the Desktop Client with the **Administrator** user account.

 For CAS genesisWorld Web and the Mobile Apps: open the Management Console > **User management > Users > Properties**, and go to the **More rights** tab to activate the rights for **SmartDesign** and Mobile Apps.

Afterwards, you can log on to these clients using the **Administrator** user account.

4 Distributing and updating CAS genesisWorld

Software updates are regularly released about every 4 weeks and a main version is released once a year.

After the first installation of an application server and a desktop client, additional clients and application servers as well as further components and maybe single user installations for several computers can be added if required.

There are 2 possible ways to distribute programs and components of CAS genesisWorld on computers and to update them with software updates. We recommend to plan and test both alternatives. Before switching to another type of installation and distribution, you have to completely deinstall CAS genesisWorld from the respective computer.

You can always only deploy one of the update procedures on a computer. However, you can use both processes on different computers.

- The following components of CAS genesisWorld can be distributed and installed using the update service: Application server, desktop client and add-ins for Microsoft Outlook and Microsoft Word.

The CAS Smart Add-on and the Crystal Reports components cannot be updated with the update service.

- The following components can be updated with MSI packages: Desktop client, Add-Ins for Microsoft Outlook and Microsoft Word and components for Crystal Reports.

Application servers cannot be updated with MSI packages.

4.1 Using the update service

The update service is based on a Windows service which helps you to install and update CAS genesisWorld automatically. The Windows service requires administrator rights. This means that CAS genesisWorld can automatically be updated on any user's computer even if the corresponding user does not have administrator rights on their computer.

The update service is configured with the configuration wizard. A time schedule and several configurations are possible, for example, to define different procedures for the application server and desktop clients.

After the setup, the service searches - depending on the time schedule and other settings - for an update and then installs the update. There are no actions required by the administrator.

The update service is automatically installed together with CAS genesisWorld.

On an Application Server, the update service is automatically deactivated after CAS genesisWorld has been installed. On a client computer, the update service is automatically activated with the default configuration after CAS genesisWorld has been installed.

Please note

The installation of an annual main version is not possible with the update service.

The update service can only be used together with Windows domains.

The update service uses the **CASUpdateManager** Windows service. If the Windows service is not running, you cannot use the update service.

You need administrator rights in Windows to configure the update service.

4.1.1 Configuration wizard

The update service is configured with the configuration wizard. Different configurations for different computers can be set up.

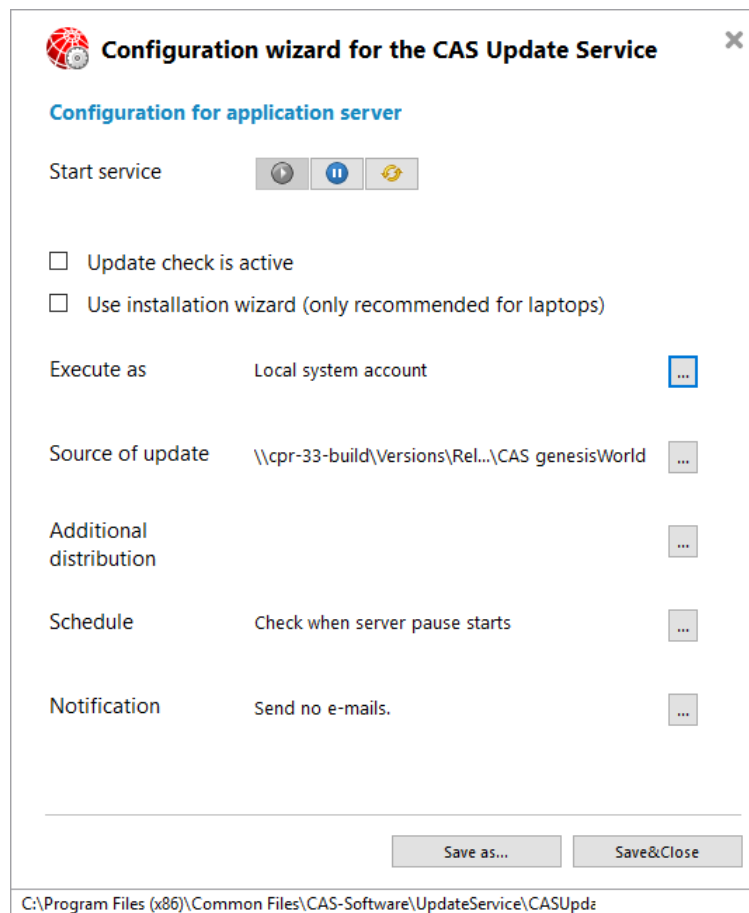
A configuration is always set up on an application server.

- ✓ Open the configuration wizard on an Application Server by double-clicking **CASUpdateServiceConfAssistant.exe** in the ..\Program Files (x86)\Common Files\CAS-Software\Server folder.

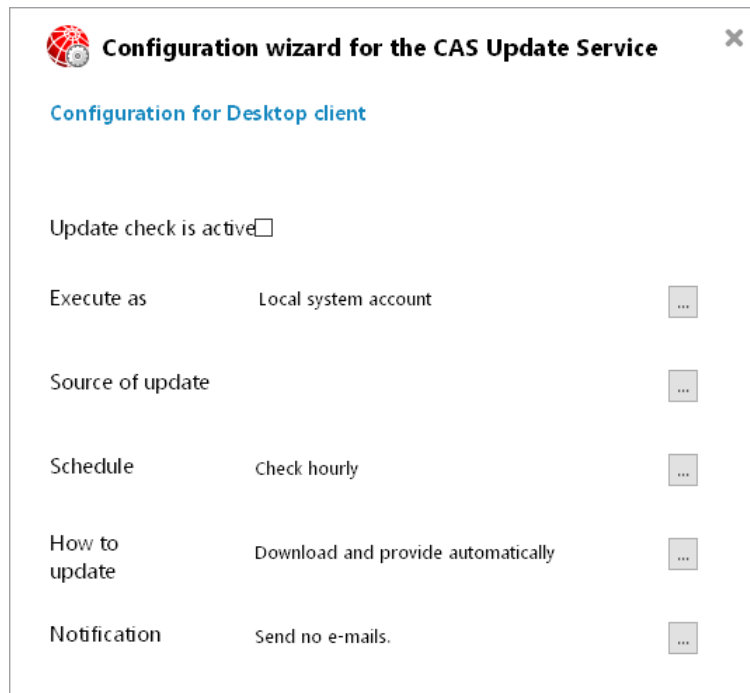
The configuration wizard opens in the language which has been last used for the desktop client or the Management Console on this computer.

- ✓ If you select **Open configuration for this computer**, you open the update service settings that are currently applied on this computer.


With this option, the **Configuration for application server** opens.



- ✓ Alternatively, select **Create new configuration for Desktop clients**.



- ✓ If you select **Open configuration from file**, you load any configuration file which has already been created.

 Click on the button behind an option for the settings.

Start service



The **Start service** and **Stop service** buttons only exist for the configuration of an application server.

Stop the service before you change the settings for the application server. By doing so, you ensure that the changes are not executed while you are still configuring the service.



Using this button, you can check if a new update is available.

An available update is immediately installed without further queries. Users who are currently logged on are informed about the update status.

An immediate update will not change schedules set in the configuration wizard.

Update check is active

With the **Update check is active** option, the update check is executed for the computer on which this configuration file is stored.

Using the installation wizard

The **Use installation wizard (only recommended for laptops)** option is only available if you open the Application Server configuration. When using this option, the installation wizard is always opened when you run an update. By doing so, you can, for example, close blocking processes.

The option is only recommended for laptops, for example, when used for replication. We do not recommend this option for application servers.

Execute as

In the **Execute as** area, you define which Windows user is used to execute the Windows service. The default setting is the **Local system account**.

The Windows account requires the following rights:

- Windows administrator rights on the Application Server
- The **Log on as service** right to the clients on which updates are to be installed.
- At least read-only rights to the folder which contains the software update

Source of update

The **Source of update** is the folder in which you copy the files for the updates. The update service searches the update source folder by the defined schedule.

After the first installation, the ..\ClientInstallation folder is entered by default on the Application Server, see chapter "Installation folders" on page 13.

If you are already using CAS genesisWorld and switch to the update service, the **SetupNetworkPath** in the registry is checked during the first start of the configuration wizard and the ..\ClientInstallation path is entered as the initial update source.

- ✓ You can enter a different path in **SetupNetworkPath** of the registry. The update source must be a folder in your network which clients can access.

Additional distribution

The **Additional distribution** option is only available in configurations for Application Server updates. This setting is optional.

If you select the **Activate additional distribution** option and enter a corresponding folder, the software update file is copied to the entered folder after the Application Server has been updated. Thereby, you can provide an additional update source folder, for example, for desktop client updates. The update file is available as .cab file.

By providing this additional distribution option, you can prevent that desktop clients are updated before the application server.

Schedule

For application servers, the **When the server break starts** option is activated by default. This option is only available for application server updates.

For computers without an application server, the hourly check is set by default. This option is only available for client updates.

Please note

The server break is set in the Server Manager.

 Online help Server Manager: [Automatic operations tab](#)

If the Application Server is updated during the server break and the server break interval is not long enough for the update to be completed, the server break is automatically extended. After the update has been completed, the Application Server restarts automatically.

How to update

These settings are only available when configuring updates for desktop clients.

During an update, the programs which are updated must not be active. Beside CAS genesisWorld, these programs include Microsoft Word and Microsoft Office; the add-ins for those Microsoft products are updated as well.

✓ **Notify me if updates are available for download**

Users receive a notification and decide when an update is downloaded and installed.

✓ **Notify me if the installation process can be started**

The update is downloaded automatically. Users will then be notified and can decide when to install the update.

This option is the default setting.

✓ **Download and automatically install update**

The update is downloaded and installed automatically. After the installation, users are informed about the successful update.

The update is executed at the time defined in the **Schedule** area.

Notification

In the **Notifications** area, you define which information you want to receive after an update attempt.

The e-mail can include the following information:

- Which components were installed, and on which computers?
- Did any errors occur?
- If errors occurred, which ones occurred?

During each update attempt, the update service updates the **CASUpdate-Service.log** protocol file with information on the update attempt. The protocol file is saved in the folder which also includes the update service configuration file.

This protocol is created and updated even if you have not activated the e-mail notification function.

- ✓ Decide first for which events these messages are to be sent, define a language and enter the corresponding e-mail addresses of the recipients.
- ✓ In the **E-mail account settings** area, you define the settings for the **Outgoing mail server** of the e-mail account that is used to send the notifications.

OAuth2 is supported by Microsoft Exchange Online as an authentication method.

OAuth2 parameters can be saved to and loaded from a file in the following: Management Console, Server Manager and in the configuration wizard for the update service.

- 🔗 Online help Management Console: [OAuth2](#)

Creating a configuration file

After you have defined the update service settings, you can save the configuration in the **CASUpdateService.ini** configuration file.

The file is saved by default in the configuration wizard folder. You can also select a different folder by clicking **Save as** in the configuration wizard and selecting the desired folder.

Restart the update service after saving so that the update service adopts any changes to the settings.

If you require different settings for different computers, you can create multiple configuration files. Enter the corresponding settings for each configuration, click **Save as** and select the matching folders for the different files.

Distributing configuration files

The configuration file is not distributed automatically. To update the desktop clients, the corresponding configuration file must be distributed to the computers that are supposed to use those settings. You need to save the file in the `..\Program Files (x86)\Common Files\CAS-Software\UpdateService` folder on the respective computers.

You can manually copy the file into the corresponding folder or distribute it automatically, for example, using a Windows Group Policy.

On computers without an Application Server, the configuration file is checked every 30 seconds by default. If a change is detected, then the changed settings are used.

4.1.2 Update service example

The figure describes an example of how to proceed with the update service and several configuration files.

1 Preparing the update source

- ✓ Copy the CAB files for the software update into the `..\Central_installation` folder.

If you have received additional customizations from your CAS Partner, you should also copy those CAB files into the `..\Central_installation` folder.

2 Defining the configuration of the central Application Server

You define the following settings in the configuration wizard:

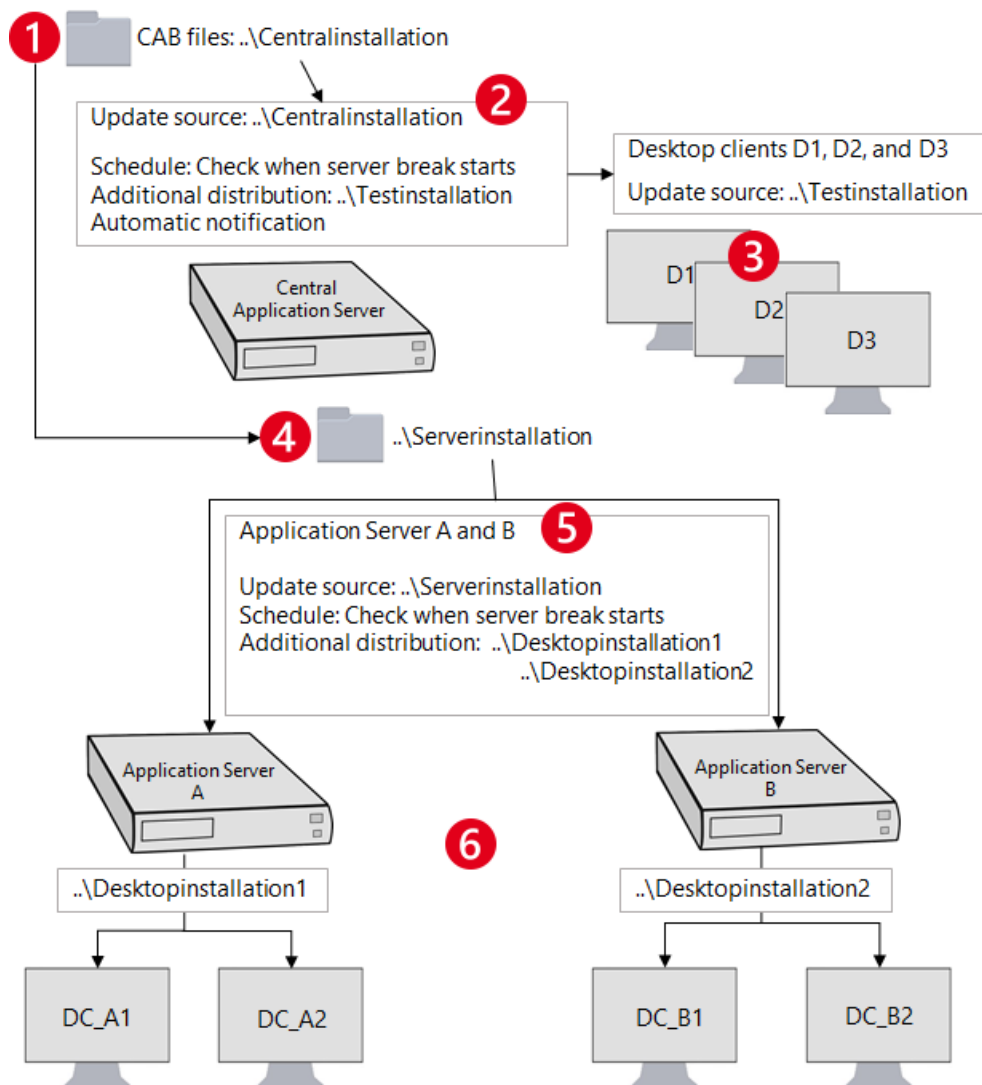
- ✓ **Source of update:** `..\Central_installation`
- ✓ **Additional distribution:** `..\Test_installation`

After you have successfully updated the central Application Server, the installation files are automatically copied to the ..\Test_installation folder. In the example, those files are used for a test installation of desktop clients.

✓ **Schedule:** Check when server break starts

At the start of the server break, the service checks whether new CAB files are available in the ..\Central_installation folder. Subsequently, the update is executed.

You define the time of the server break in the Server Manager.



✓ **Notification:** Send e-mail if errors have occurred and if the update was successful.

All entered users will receive a notification as soon as an update attempt has occurred on the central application server. With the settings in the example, recipients will receive an e-mail both if the update has been successful and if the update has been cancelled.

3 Testing the installation

If the update of the central application server has been successful, we recommend that you first test the installation of desktop clients on 2 to 3 computers. Thereby, you can identify possible problems early and find proper solutions.

The installation files are saved in the folder which has been defined under **Additional distribution** in the configuration file of the central Application Server. In our example, this folder is defined as `..\Test_installation`.

4 Preparing update sources for further application servers

After your test has been successful, you can update further application servers.

- ✓ Copy the CAB files into the `..\Server_installation` folder on the central Application Server.

This folder serves as the update source for further Application Servers.

5 Defining the configuration for further application servers

You define the following settings for additional application servers in the configuration wizard:

- ✓ **Source of Update:** `..\Server_installation`
- ✓ **Additional distribution:** `..\Desktopinstallation1` and `..\Desktopinstallation2`

In this example, we use two different configurations and therefore we need to create two separate configuration files. We need two separate folders as you can only enter one folder for each configuration file of the additional distribution.

- ✓ **Schedule:** Check when server break starts

6 Setting up desktop client updates

Finally, you configure the desktop client updates and distribute the configuration files.

- ✓ Enter `..\Desktopinstallation1` or `..\Desktopinstallation2` as **Source of update** in the configuration files for the desktop clients.
- ✓ Distribute the configuration files to the corresponding desktop clients.

When updating the desktop clients, the corresponding update files are taken from the respective entered folder.

4.1.3 Update procedure

The installation for desktop clients can be run in the foreground or background. An application server installation always runs in the background.

Software updates are cumulative. A software update with a higher version number includes previous updates. If the folder defined as update source contains multiple software update files, the software update with the highest version number is installed. You cannot select individual updates.

The update files are always first downloaded from the folder which has been defined in the configuration wizard. Once the files are downloaded, the installation process is started.

You can deinstall an update if required.

Foreground installation

With this type of installation, the installation steps are displayed. We recommend this type of installation for desktop clients, especially, if users are supposed to be able to react during the installation.

If the update service has been set up and activated, users are notified as soon as an update has been found and can decide whether they want to update CAS genesisWorld now or later.

Before installing, the system checks whether there is enough free space on your computer. If this is not the case, a hint is displayed and users can decide whether they want to continue installing anyway.

During the installation, the system checks whether blocking processes can be found. Such blocking processes include, for example, Microsoft Office products that are still running. Users can then terminate those processes and continue installing.

You can only choose between immediate and later update installation or terminate blocking processes if you install in the foreground.

Background installation

With this type of installation, the update is started automatically. If problems occur, such as blocking processes or lack of memory, the installation is canceled and an error message is displayed. If possible, steps that have already been carried out are undone and the initial state is restored.

In the update protocol, you can check whether and which errors have occurred. Additionally, you can receive notifications via e-mail, see chapter " Configuration wizard" on page 30.

Blocking processes have to remain inactive until the installation is complete.

Application servers are always updated in the background.

4.1.4 Restoring or returning to an earlier version

Using the update service, you can deinstall an update if required. For this purpose, you add the **Rollback_** prefix to the name of the last update file.

The installation of the previous version can only be executed if a backup of the previous version can be found on the computer.

4.2 Distributing MSI packages

Using MSI packages, you can define that the CAS genesisWorld software is to be installed on the respective computers once they have been started. Please note: updating with MSI packages requires that all programs and additional elements of CAS genesisWorld must be deinstalled and subsequently reinstalled.

CAS genesisWorld customizations by your CAS Partner can potentially also be distributed using MSI packages. Please contact your CAS Partner if necessary.

MSI packages can, for example, be distributed via a group policy.

Important information

- The Windows Active Directory must be set up and activated.
- The MSI packages must be available at a central location, for example, in a folder in the network. The folder containing the MSI packages must have been released to the respective Windows users, i. e. defined as a shared folder.
- Please note that you can only install one MSI package at a time.
- We recommend the software distribution via computers.
- During the software distribution process, the system checks every few hours whether the group policies have changed. The system also checks for group policy changes when the computer is started and/or a user logs on to Windows.
- If the **Immediately uninstall the software from users and computers** option has been activated, CAS genesisWorld is deinstalled immediately after the check.
- Before you install a new software version via MSI, you must always deinstall the previous version via MSI. Deinstalling manually is not possible.

You must consider the following restrictions when installing MSI packages:

- Installing via MSI packages and the use of the Update Service negate one another on the same computer.
- MST files to configure the installation are not supported.
- When installing with MSI packets, the **LANGUAGE** parameter determines which language packets are installed.

The default is: **EN,IT,FR,ES,NL,CS,HU,RO,PL,PT,TR.**

To install fewer language packets, simply enter the respective ISO codes using comma separation. For instance, **LANGUAGE=EN,IT** to only install English and Italian.

German is the default language and therefore does not need to be entered as a parameter.

4.2.1 Sequence of the MSI packages

During the installation of CAS genesisWorld, certain components require other components. Therefore, you must follow a specific order when installing the MSI packages. You can ensure that the required installation order is fulfilled by using individual MSI packages. If you compile all installation files in one MSI package, you cannot ensure that the correct sequence is kept.

First of all, install components 1 - 5 according to the given sequence. Afterwards, you can install CAS genesisWorld. If users are also to work with the Microsoft Word and Microsoft Outlook Add-Ins, install the add-ins after you have installed CAS genesisWorld.

1. Net Framework 4.6.2
2. SAP Crystal Reports runtime
3. CAS genesisWorld Crystal Report integration

SAP Crystal Reports runtime and the CAS genesisWorld Crystal Report integration are required to display reports in CAS genesisWorld.

You should use the current 32-bit version, even for a 64-bit system.

4. Microsoft Visual C++ 2008
5. CAS genesisWorld
6. CAS genesisWorld Add-In for Microsoft Word
7. CAS genesisWorld Add-In for Microsoft Outlook

4.2.2 Crystal Reports components

The free Crystal Reports integration and SAP Runtime are used as components to display reports in CAS genesisWorld. For more information on the version you require, please see the current release notes at [CAS genesisWorld knowledge hub](#).

A separate package must be created for both components which has to be installed before the desktop client package. The desktop client and the components cannot be installed simultaneously.

4.2.3 Software updates via MSI

During a software update, you remove the existing installation and then provide the updated version.

- ✓ The first step is to deinstall the existing version of CAS genesisWorld via MSI.
- ✓ Provide the new CAS genesisWorld installation via an MSI package.

The software updates are installed on the users' computers as soon as the computer has been restarted or the users logon to Windows.

4.3 Updating desktop clients on remote desktop servers

We recommend a manual installation to update desktop clients on remote desktop servers or terminal servers. You can perform a manual installation by using either the setup.exe file or the HotfixSetup.exe file.

You cannot use the update service on a remote desktop server.

Manually installing desktop clients

To be able to execute the installation, all CAS genesisWorld users must log off the remote desktop server.

- Before you start, switch to installation mode in the remote desktop server.
- ✓ Log on to the remote desktop server as a user with administrator rights.
- ✓ Open the registry.
- ✓ Delete the path that is entered at **SetupNetworkPath**.
- ✓ Install the desktop client for all users.

4.4 Software updates for partner solutions

Software updates for partner solutions can be installed using the update service and with MSI packages.

For further information about individual solutions, please contact your CAS Partner.

5 Administering application server and database

Installing and administering databases or setting up and controlling the application server for CAS genesisWorld is done with 2 programs: the Database Wizard and the Server Manager, see chapter "CAS genesisWorld architecture" on page 6. This manual explains you the basics.

5.1 Database Wizard

With the Database Wizard, you manage one or several CAS genesisWorld databases. This includes:

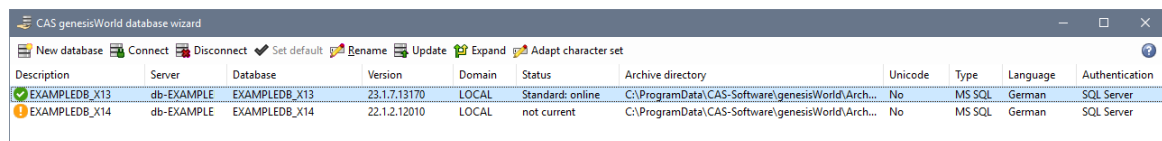
- Creating new databases
- Connecting the application server and the database
- When making software updates, the database model may change, for example, because new extensions through modules, new fields, or functions for fields are added. In such cases, the database must be updated using the Database Wizard.
- Defining the default database to which a logon is possible without entering a database name.

One application server can access several databases or tenants with different data, for example, for employees, suppliers and customers. Each database requires separate licenses.

Once you have installed the Application Server, you can then launch the Database Wizard on the computer the Application Server is running on. This computer must have access to the database server.

- ✓ In the CAS genesisWorld program group, click **Database Wizard**.

After you have started the Database Wizard, a window opens displaying a list of all available databases. In this window, you access all database functions.



The first time you install CAS genesisWorld, the access to an already created database is configured via the Database Wizard, see chapter "Setting up the database" on page 25.

- 🔗 [Online help Database Wizard](#)

Functions

You can call all functions of the Database Wizard via the buttons of the toolbar.

- 📁 With the **New database** button, you create one or several empty databases for CAS genesisWorld, see chapter "Setting up the database" on page 25.

The **Administrator** user account is automatically available in a new database. With this user account, you can then log on to the Management Console. You do not need a password for this first logon.

- 🔗 You control access of an application server to an existing database via the **Connect** or **Disconnect** buttons.

To be able to connect a database, you must have access to the database server. To do so, you require a database user with the **db_owner** role.


The folder for the Document Archive is also defined after clicking the **Connect** button.

The corresponding database will not be deleted with the **Disconnect** button. The database is deleted in the management area of the database system. Please note that you may also have to disconnect existing connections on the management area to be able to delete the database.


✓ With **Set default**, you define the default database in CAS genesisWorld.

When starting most CAS genesisWorld programs, a drop-down list from which to select the database is displayed.

If a database is not selected, then the system automatically connects users to default database.

 If you change the name of the database with **Rename**, the new name is displayed when logging on to a client.


The name of the database in the database system is not changed.


 With the **Update** button, the database model of an existing database is adjusted, for example, after a software update.

The product information document for each software updates informs users whether an update is required. An update is usually required for each main version once a year.

Before updating a database that uses the Microsoft SQL Server database system, the compatibility level is detected automatically and then displayed. You can only perform an update if the compatibility level of the database is at least 100. The syntaxes of different Microsoft SQL Server versions can vary and the compatibility level indicates whether the database's behavior is compatible with the Microsoft SQL Server version you want to use.

Make sure that a current backup of the database exists before updating.

 Via the **Expand** button, new data record types or additional fields are added to a database using script files.

 With the **Adapt character set** button, you change the collation of the selected database or activate the Unicode collation.

 Online Help Database Wizard: [Adapting the character set](#)

5.2 Server Manager

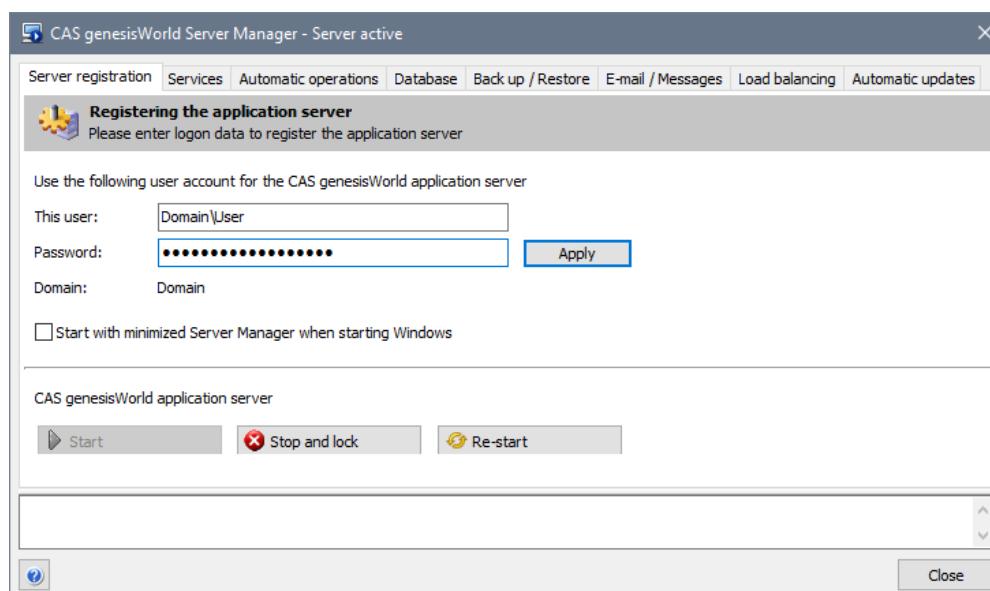
With the Server Manager, you control the application server, for example, the registration activities, the connection to the database, the load balancing or the services and ports such as the CAS Authentication Server which is used to authenticate CAS genesisWorld Web, the mobile apps, the Microsoft Outlook Add-In and the CAS Smart Add-on.

In the Online Help for the Server Manager you will also find descriptions of options for monitoring CAS genesisWorld.

- ✓ In the CAS genesisWorld program group, click **Server Manager**.

The settings in the Server Manager are automatically saved every time changes are made. The log file is displayed in the lower pane of the window.

- 🔗 Online Help [Server Manager](#)



- ✓ On the **Server registration** tab, you enter the Windows user account for the CAS genesisWorld Application Server with the corresponding rights. The first registration is done during installation, see "Registering the Application server" on page 21.

On the **Server registration** tab, you can also stop and lock the Application Server if needed, for example, for urgent maintenance issues.

- ✓ In the **Services** tab, you administer Web Services and other services for functions, integrations and modules of CAS genesisWorld.

Some services are set up as default services and automatically activated after the first CAS genesisWorld installation.


Using the **CAS Authentication Service** you have the option of using token-based authentication for CAS genesisWorld Web, the mobile apps, the Microsoft Outlook Add-In and the CAS Smart Add-on.

- 🔗 Online help Server Manager: [CAS Authentication Server](#)

You can change the basic settings for logging on to clients in the Server Manager and in the Management Console, for more detailed information see "Options for logging on" on page 80.

You can activate additional services depending on the functions, integrations and module. The more services are active, the more working memory is required.

In this tab, you also define the **Ports** for the services. To deploy similar ports for several clients and/or services and for security reasons, we recommend to deploy a reverse proxy.

 Online help Server Manager: [Using a reverse proxy](#)

- ✓ On the **Automatic operations** tab, you can define the server break for CAS genesisWorld.


A server break is recommended, for example, when checking and installing updates, see chapter "Configuration wizard", on page 30.

We recommend you plan server breaks during times in which few people are working.

- ✓ On the **Database** tab, you can test and monitor the connection between the Application Server and the CAS genesisWorld database.
- ✓ On the **E-mail/Messages** tab, you define whether and in which cases the Server Manager sends e-mail notifications.

To so, you can define cases and an e-mail account.

- ✓ On the **Loadbalancing** tab you can define settings for distributing desktop client log ons between the application servers. Thus you can manage the load of multiple application servers regarding desktop clients.

 Online help Server Manager: [Desktop client logons](#)

You can also perform loadbalancing for CAS genesisWorld Web and the mobile app. To do this you change settings in the Internet Information Services (IIS), on the Application Server and in RabbitMQ.

 Online Help Server Manager: [Mobile solutions](#)

In system landscapes you can monitor CAS genesisWorld using the data which is made available through the different components.

Using different programs you can call and save this data. And of course, you can also analyze this data if you wish.

A number of KPIs are available. For instance, for the Application Server you can access information on sessions, processes or other metrics from Com+. Likewise for CAS genesisWorld Web, there are memory-related or CPU- and process-related metrics.

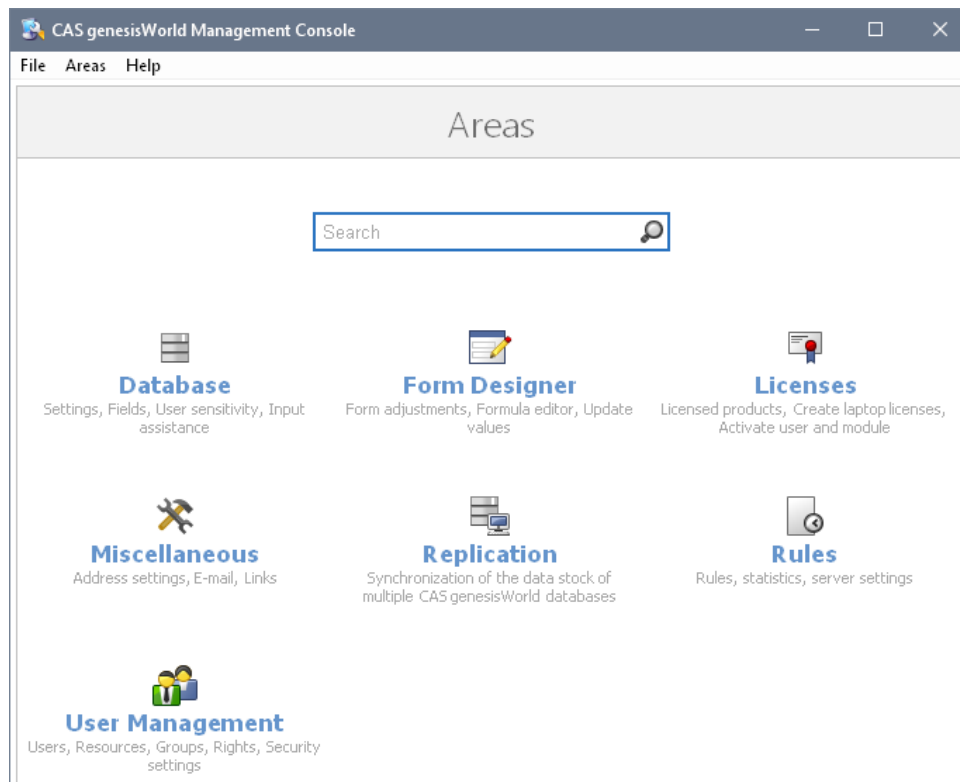
 Online help Server Manager: [Monitoring CAS genesisWorld](#)

6 Customizing CAS genesisWorld

After you have installed the program and defined the settings in the Database Wizard and Server Manager, you configure CAS genesisWorld. This includes, for example, user accounts, rights, defaults for the interface and automatic functions, such as notifications or actions.

For more basic information about views, company-specific workflows as well as processes and automatic functions, please refer to the "[First steps](#)" manual.

Many necessary settings are defined in the Management Console. If special functions are required, more settings can also be defined in the Desktop Client, in the App Designer for CAS genesisWorld Web and via integrations, such as the Form & Database Designer.



This manual covers the basics. For further information and details on all functions, please refer to the corresponding user guides or online help pages.

Starting the Management Console

You can find the Management Console in the **CAS genesisWorld** program group.

After starting the Management Console, you can see an overview of the available areas. Which areas are available to you in the Management Console depends on the edition and existing extensions. You can use the search function to find further areas and functions.

Activating modules for users

The deployment of functions and access to data record types basically depends on the licenses that are activated for a user account.

Functions for integrations are only displayed in the Management Console and can only be set if the corresponding license is entered.



Select the **Licenses** area.

Licenses for user accounts and licenses for integrations and/or modules must be activated for users.

The activation is always made for individual user accounts and is not possible for groups.

Licenses can only be activated for a specific number of users. If the maximum number of users has been reached, no further user accounts can be activated.

If a license does not refer to a number of user accounts, user accounts must not be activated.



In the **User management** area, go to the **Properties** window to view the activated licenses for one user account in the **Licensed modules** tab.

6.1 Create user accounts, resources and groups

You create user accounts, resources and groups in the Management Console in the **User management** area and in the respective folders. The process and several functions are the same for user accounts, resources and groups.

- ✓ The **Default** template is available for user accounts, resources and groups.
- ✓ During creation, a **Properties** window with several tabs opens.
- ✓ Certain entries are mandatory entries, for example, the **Name**.
- ✓ When changing data, the same **Properties** window opens.
- ✓ When duplicating, not all properties are transferred.
- ✓ Several properties can be defined for several marked user accounts, resources and groups at once.
- ✓ An e-mail address is required for each user account. This does not apply to groups and resources, but e-mail addresses can be helpful for certain automatic functions.

Defaults

When creating a new user account, a new resource or group, the respective **Default** entry is duplicated as template and the corresponding settings are applied.

You find the entries for **Default** in the respective folder for user accounts, resources and groups.

- ✓ You can therefore always define the same settings for the **Default** entry.
- ✓ Groups are deactivated if they do not have members.


A group without members is saved in the **Empty groups** folder. If the **Default** group does not contain any members, any new group is empty as well.

- ✓ To administer rights more easily, we recommend to deactivate all rights for **Default** entries for user accounts and groups.
- ✓ The **Default** entries cannot be deleted.

E-mail addresses

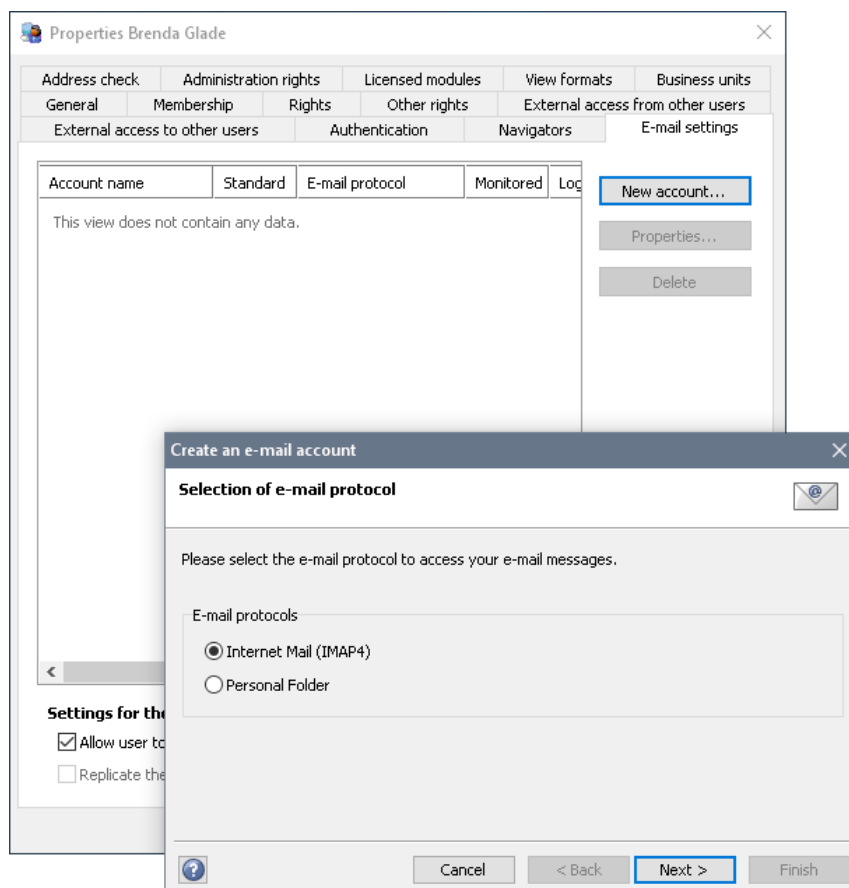
Each CAS genesisWorld user account requires a unique e-mail address.

Users cannot change this e-mail address. The e-mail address is used for the invitation management function and the notification service.

 You enter the e-mail address on the **General** tab in the **Properties** window of a **user account** in the User Management area.

 Online help Management Console: [E-mail settings tab](#)

- ✓ We recommend that you use this e-mail address for the default e-mail account for a user account in CAS genesisWorld.
- ✓ E-mail addresses are not necessary for groups. With such e-mail addresses, you can use the notification service to inform the entire group.



- ✓ E-mail addresses are also not necessary for resources. Existing e-mail addresses can also be helpful for the notification service when managing resource plans.

- ✓ You can enter and check e-mails systematically and simultaneously in the Management Console for multiple user accounts and resources.
- 🔗 Online help Management Console: [Creating several e-mail accounts at once](#)

6.2 Assigning rights as administrator

In this manual, the basics of how administrators can assign rights are described.

Terms and contextual information such as owner rights, general and specific external access rights, rights to certain functions as well as the assignment of rights by users are described in the "[First steps](#)" manual.

As administrator, you define the settings for rights in the Management Console. You can usually define owner rights and the external access right as well as the rights to functions for user accounts and user groups.


The activation of licenses also affects the rights to data record types and functions which is only possible for user accounts.

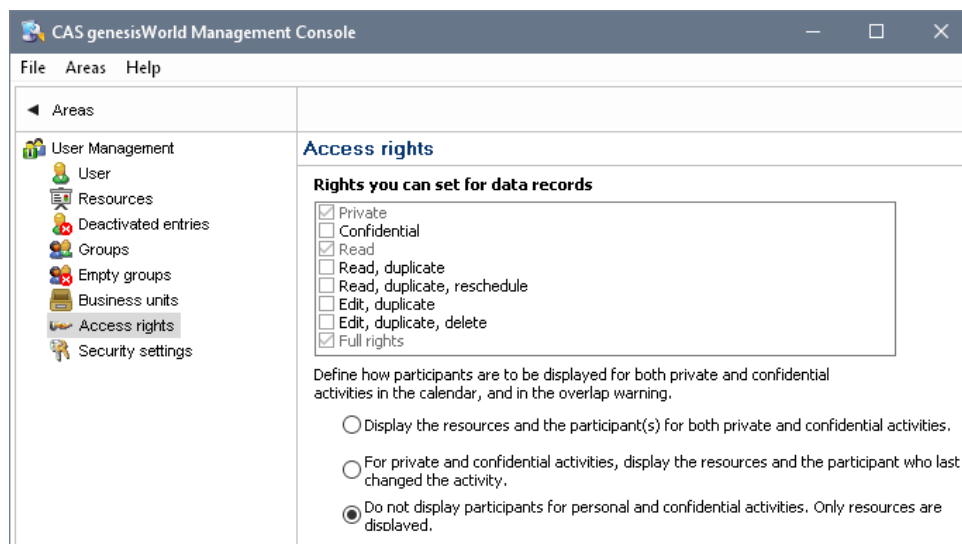
With rights, you protect the data in CAS genesisWorld and prevent undesired data loss.

- 🔗 Online help Management Console: [Special rights for data protection](#)

Two settings are important when assigning access rights.

Enabling access rights

 Go to the **User management** area and select the **Access rights** folder.



- ✓ In the **Rights you can set for data records** area, you define which ownership rights can be granted by users in user-sensitive data records.
- 🔗 Online help Management Console: [Access rights](#)

- ✓ The following rights are mandatory and cannot be deactivated: **Private**, **Read**, and **Full rights**.

🔗 Online help Management Console: [Access rights levels](#)

User sensitivity

In order to assign rights to data records, the corresponding data record type must be user sensitive.

Graduated ownership and external access rights be assigned by users only for user-sensitive data records.

For non-user-sensitive data records, the permissions that you set as an administrator in the Management Console apply to the entire data record type or to specific data records of a data record type.

User records that are not user-sensitive are visible to all users who have access rights to the data record type. You cannot assign individual ownership rights for these data records. If a data record type is not user-sensitive, the **All (public)** user is automatically entered as participant in newly created data records.

We recommend to plan and set the user sensitivity at an early point to avoid problems when making changes at a later time.

☰ Select Management Console > **Database** area.

📅 Select a data record type and click **Customize data record type**.

🔗 Online help Management Console: [User sensitivity](#)

👉 After changing the user sensitivity, click **Apply** to save the changes in the database.

- ✓ Afterwards, you must restart the Application Server in the Server Manager, see chapter "Server Manager" on page 43.

6.2.1 Rights for user accounts or groups

As administrator, you can set owner access rights and external access rights for individual user accounts or groups.

Assigning rights on group level is especially useful if many users are supposed to work with CAS genesisWorld. By using groups as the basis for the rights system, you can, for example, assign rights for business tasks and add users to corresponding groups. In that way, the administration load can be reduced.

You assign rights to users and groups in the Management Console.

Assigning rights on group level

We recommend you manage and grant rights completely via groups. You can achieve this by working with 2 types of groups and by building hierarchical group structures.

- You can use organizational groups to manage and map the department or team membership of employees.

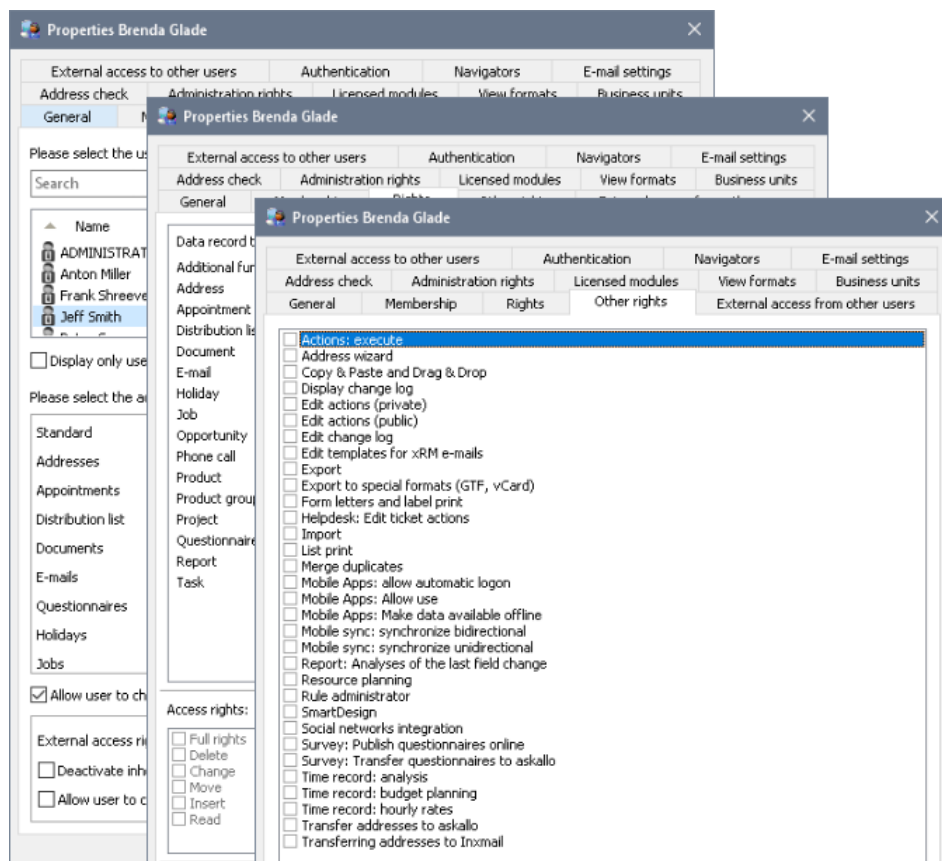
You can use organizational groups to define external access rights. By assigning certain external access rights to a group, all members of the group have these external access rights to each other. If required, you can deactivate the function of inheriting external access rights via group membership for individual users.

- For group rights, certain owner rights or rights to functions are set. Depending on the requirements, a separate group can be created for each possible right. This helps you keep track of colleagues' rights when managing them.

We recommend to define precise names for these groups and adding a unique prefix to their names, for example, **r_ChangeAddress**. This way, you can easily differentiate rights groups from organizational groups and can see at a glance which rights have been assigned to the users of an organizational group.

You must not assign external access rights to these groups as these groups are otherwise displayed in CAS genesisWorld and can be added as participants to data records.

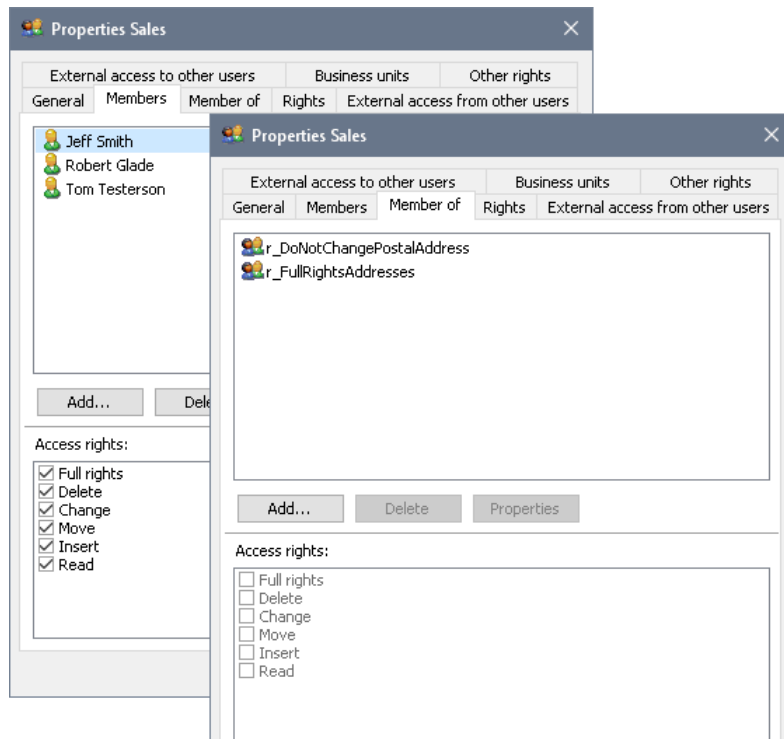
Example: In a new user account all rights are deactivated in the **Settings** window.



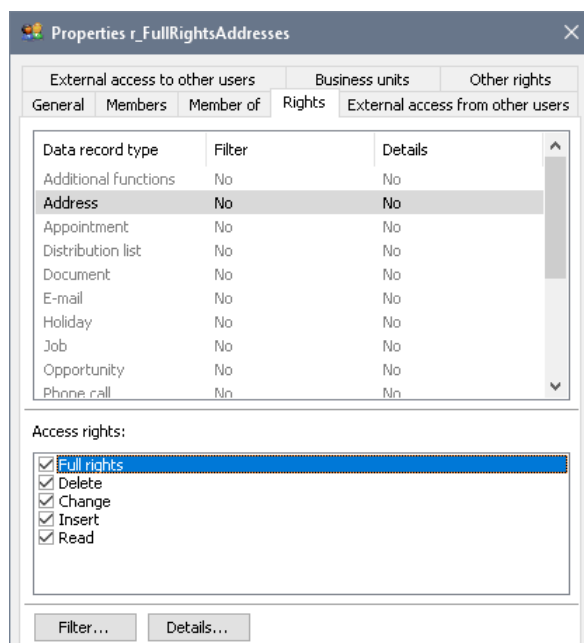
- ✓ The colleague works in sales and is therefore entered as member in the corresponding group.

In the **Sales** group, no rights are entered in the **Settings** window either.

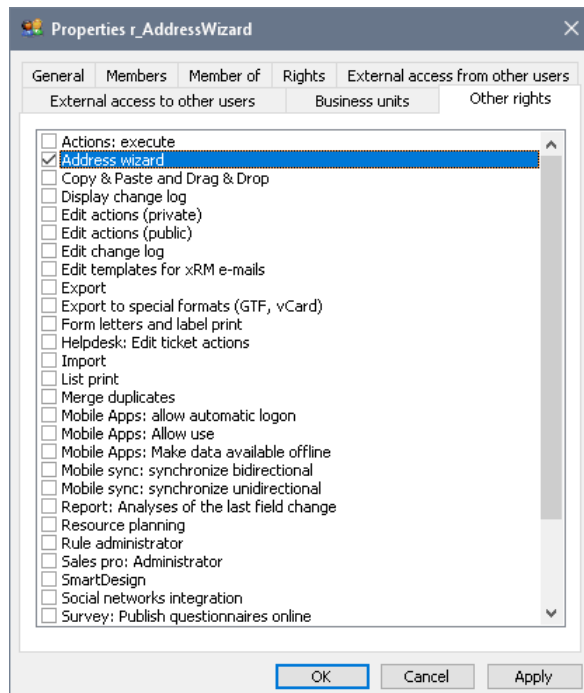
- ✓ The **Sales** group is a member of the **r_FullRightsAddresses** and **r_AddressWizard** rights groups.



In the **r_FullRightsAddresses** group, you have assigned **Full rights** to the address data record type. All other rights are deactivated.



In the **r_AddressWizard** group, you have activated the **Address wizard** option on the **Other rights** tab. All other rights are deactivated.



Brenda Gladis inherits full rights to addresses as a member of the **Sales** group, as well as the additional **Address wizard** right.

Robert Glade is also member of the **Sales** group. The group has been assigned the **Read** right as an external access right to itself. Robert Glade and Brenda Gladis inherit this external access right as members of this group. Both have read access to the data records of the other colleague, if the persons have not set less access rights to a data record.

Please note


Group rights add up. If a user is a member in different groups and inherits, for example, differing rights to the same data record type, the strongest right always applies. This applies to owner and external access rights.

You must not create cycles through hierarchical groups. If, for example, group B is a member of group A, group C is a member of Group B, and group A is a member of group C, you have created a cycle. This can cause an unintentional rights transmission. Therefore, cycles are prohibited in CAS genesisWorld. When hierarchical groups are created and during each start of the Application Server, the system checks whether cycles can be found. If a cycle is detected, the administrator receives a message.

You can also assign owner and external access rights to archived e-mails as you would for other data record types. Non-archived e-mails are personal.

6.2.2 Owner rights for data record types

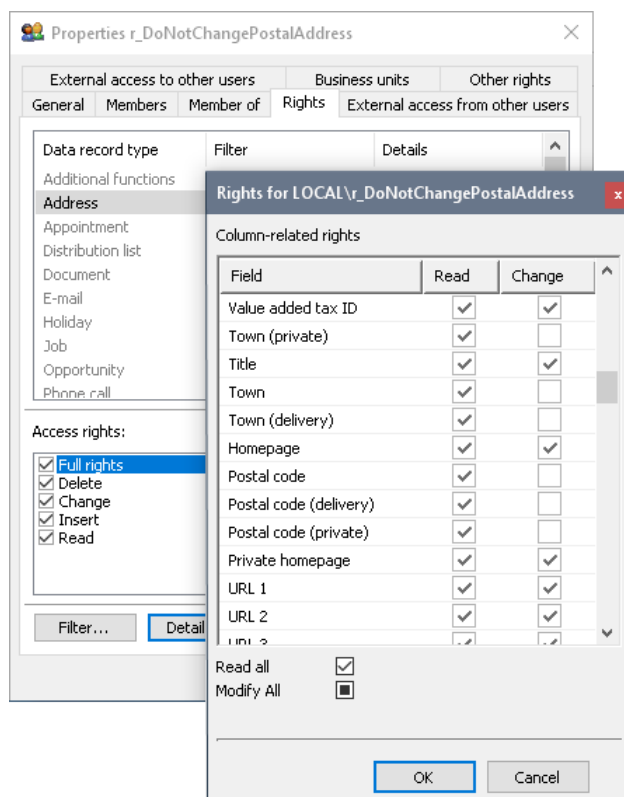
The settings for owner rights to data record types are the same for users and groups.

 In the **User management** area, go to the **Properties** window.

Owner rights can be set on different levels.

- In the **Rights** tab of the **Properties** window, you create owner rights for the entire data record type.
- By defining a filter in the **Rights** tab of the **Properties** window, you assign rights to certain data records of a data record type.
- With the details function in the **Rights** tab of the **Properties** window, you define rights to certain fields of data records.

If you deactivate the **Read** right for a field, the **Change** right is also deactivated. Without the **Read** right, users will never see the field in CAS genesisWorld.



With filter settings, you can limit the display of data in CAS genesisWorld. You cannot use the filter settings to define that certain fields can only be read or changed in a specific context.


In general, rights add up here as well. A member of different groups with different rights always has the highest right.

 Online help Management Console: [Rights, filters and details](#)

6.2.3 Defining external access rights

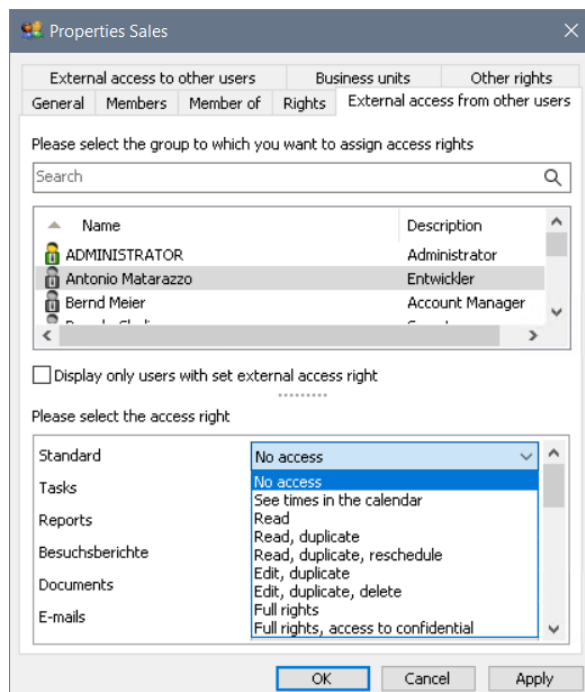
By assigning external access rights, you assign rights for users to other users' data records. You can take 2 perspectives, for example, the perspective of group A or B.

Seen from perspective of group A, **External access to other users** exists for this group, that is, group A can access the data records of group B. **External access from other users** - group B - exists in data records from group A. This means, that all entries that refer to group A are displayed reversed for group B - that also applies to the tabs of group B's properties window.

 In the **User management** area, open the **Properties** window of a group and then go to the **External access from other users** tab.

- ✓ In order to set the same external access for all data record types, select an entry in the **Default** drop-down list.
- ✓ For all other drop-down lists for data record types select the **Default** value.

For groups, you can define whether group members have external access rights to each other. To do so, the group must at least be assigned the external access right **Read** to itself. The group members inherit this external access right.

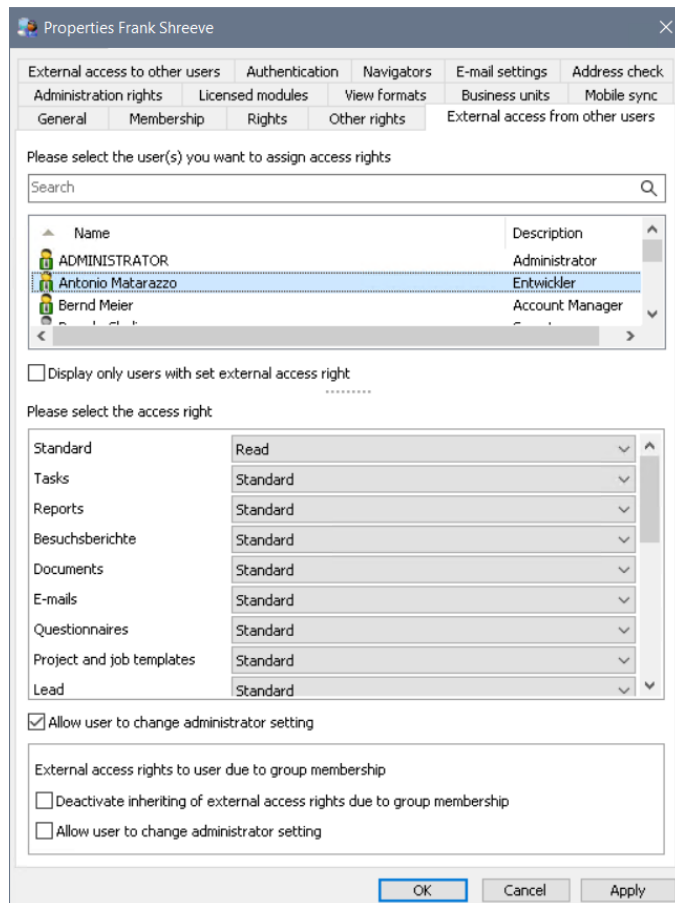


Groups, user accounts and resources

The settings for external access are mostly the same for groups, resources and user accounts.


For groups, the settings described above can be applied.

For resources, you cannot define **External access to other users**. This prevents that users can access data records of user accounts or groups via resources.



For user accounts, 3 more options are available in the **External access from other users** tab.

- ✓ With the first option activated in the screenshot, **Allow user to change administrator setting**, users can change the set external access of the administrator in the desktop client.

 If this option is activated, the corresponding setting can be found in the desktop client, in **Settings > General**. When defining settings here, users change the general external access of users and groups to all data record types.


These settings in the management console and in the desktop client apply to a user account and thus in all clients.

We do not recommend you activate the **Allow user to change administrator setting** option, as settings made by users may prevent corporate default settings for CAS genesisWorld.

- ✓ If you activate the **Deactivate inheriting of external access rights due to group membership** option, the user will not inherit additional access rights from membership of one or more groups.

If the option is not active and external access rights for groups have been set, then a user's external access rights are added together and also the external access rights of the group. The highest right is always given priority.


- ✓ If you activate the 3. option, **User is allowed to change the default value of the administrator**, then users can deactivate external access via group membership.

 If this option is activated, the corresponding setting can be found in the desktop client, in **Settings > General**.

We do not recommend you enable this option either, because the administrator settings in the desktop client can be changed and they may be other settings available for each user account.

6.2.4 Other rights

Many rights for functions can be set as additional rights and can also be set for groups, see chapter "Assigning rights on group level" on page 51.

 Go to the **User management** area, open the **Properties** window and then go to the **Other rights** tab.

With these options, you also activate the use of CAS genesisWorld Web and Mobile Apps.

You can also assign other rights for several integrations, for example, for Helpdesk or Survey. For some integrations, more rights exist, for example, for the time recording in Project.


6.2.5 Special settings for specific rights

Several settings are available for user accounts for certain roles or task areas.

Administrator

The **Administrator** user account is always available in CAS genesisWorld and cannot be deleted.

The **Administrator** right can be activated for further user accounts.

 Go to **User management > Users** and then open **Properties > General**.

User accounts with this right have extensive access to data, settings and functions of CAS genesisWorld.

- Logging on to the Management Console is possible with a user account with **Administrator** rights and all functions of the Management Console are available.


- With such a user account, logging on to the desktop client and functions for the administrator are available in the desktop client.

In CAS genesisWorld Web, the **Administration** app is, for example, available for the App Designer with this user account.

- Full rights exist to data record types and fields.
- As with all user accounts, users can access specific data records in the clients depending on owner rights and external access rights.

Rules administrator


The **Rule administrator** right allows the creation, editing and administering of rules for notifications and actions. With this right, this can also be done in the Desktop Client and does not require logging on to the Management Console.

 In the **User management** area, go to the **Users** folder, click **Properties** and open the **Other rights** tab.

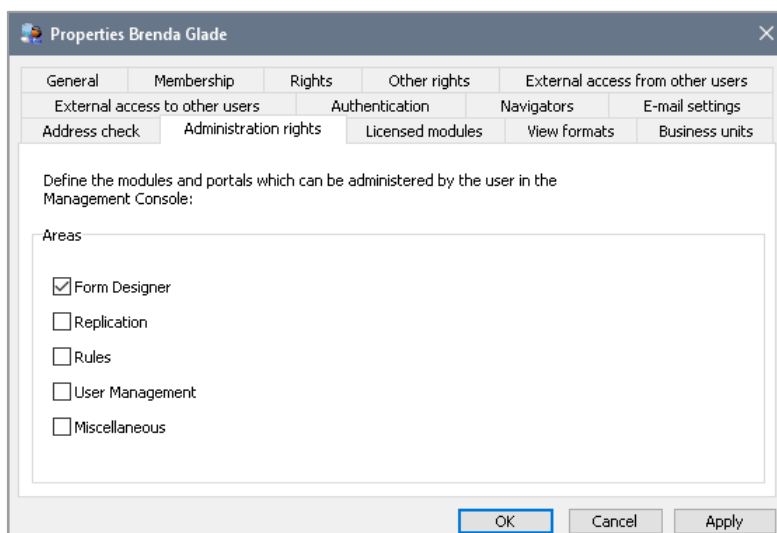
Administration rights

With the **Administration rights** option, you allow that certain activities including the corresponding functions are possible for a user account in the Management Console. These activities include, for example, managing users or working with the Form Designer.

This right can only be defined for user accounts, not for groups or resources.


 Select the **User management** area > **User** folder > **Properties** window > **Administration rights**.

The display of options in this tab varies depending on the deployed CAS genesisWorld integrations.



Guest access and invitations

External access and the creation of appointments can be restricted with two options.

 Go to **User management >Users** and then open **Properties > General**.

- ✓ With the activated **Guest: no access to public data records** option, no public data records will be displayed. Furthermore, users cannot set external access rights for this user account.

Further restrictions also apply, for example, to the password or the assignment to groups. Owner rights for data record types can be set for the user account.

- ✓ Using the activated **Invite to appointments only** option, users can invite people to appointments, but cannot however, schedule appointments for other users.

 Online help Management Console: [General tab](#)

6.3 Interplay between rights

CAS genesisWorld offers various options to assign a user more or less rights to data records.

- The administrator defines possible owner rights for data record types and data records in the Management Console.
- The administrator defines a general external access for a user to data records of another user.
- Users are members of the same group. Members of the group have specific external access rights to data records of other members.

This means that certain members may have more rights, other members may have less rights.

- Users assign rights to data records by entering participants.
- Users can assign specific external access rights to a data record when entering participants.

Important information

- The rights defined for users and groups add up.

Be careful not to unintentionally assign more rights than defined for the individual user by adding them to a group.

- The administrator can grade the general external access rights for each data record type and user respectively in the Management Console.

Users can change the settings of the administrator if the corresponding option is activated in the Management Console.

- The existing general external access for a data record can be restricted through a specific external access.

This setting applies to all users who have external access rights to the owner of the data record.

- Ownership rights have priority over external access rights.

For the participant of a data record, owner rights to the data record exist. If the owner right differs from the external access right, then the owner right apply.

6.3.1 Example: CEO's appointments

The CEO, their assistant, and a divisional manager are members of a group and have been granted full rights within the group. The group has read external access to itself. Therefore, the individual group members have read external access to the data records of the other group members.

CEO	Assistant	Divisional manager
Creates an appointment in which they are the only participant.	Has Read external access via group membership. The assistant is allowed to read the appointment, but cannot change it.	Has Read external access via group membership. Has read access to the appointment but cannot change it.
Changes the external access of assistants and grants them Full rights, Access to confidential for appointments.	Has now full rights to the appointment.	Can still only read the appointment.
Creates a new appointment and sets external access to confidential .	Has full rights to this appointment.	Does not have access to this appointment.
Creates a new appointment and sets external access to private .	Does not have access to this appointment.	Does not have access to this appointment.
Creates a new appointment with the assistant as a second participant.	Has full rights to this appointment.	Can read the appointment, but not change it.

6.4 Central default settings

For more basic information about company-specific workflows, processes and automatic functions as well as additional defaults, please refer to the "[First steps](#)" manual. This enables new colleagues to benefit from a tailored user interface and an overview about relevant data. Standardized corporate workflows can thus easily be designed and provided to all colleagues.

Many defaults are only defined in the management console. Some defaults can only be set in the desktop client and additional defaults can be set both in the management console and in the desktop client. Defaults can be defined for individual, several or for all users.

6.4.1 Navigators

A navigator is a collection of views. In CAS genesisWorld, different navigator types are available. The display of the navigators differs depending on the client.

- Program navigators in the desktop client contain views for data records.

In CAS genesisWorld Web and the Mobile Apps, the list views of program navigators can also be displayed in the apps of a data record type.

In CAS genesisWorld Web, you can create views and public views, if you have the necessary rights independent of the desktop client.

- Link navigators and dossiers in the desktop client contain views for linked data records.

Dossiers in CAS genesisWorld Web also display linked data records.

The administrator defines which data record types can be displayed in the dossier in the **Management Console** under **Miscellaneous**.

The settings for link navigators only apply in the desktop client.

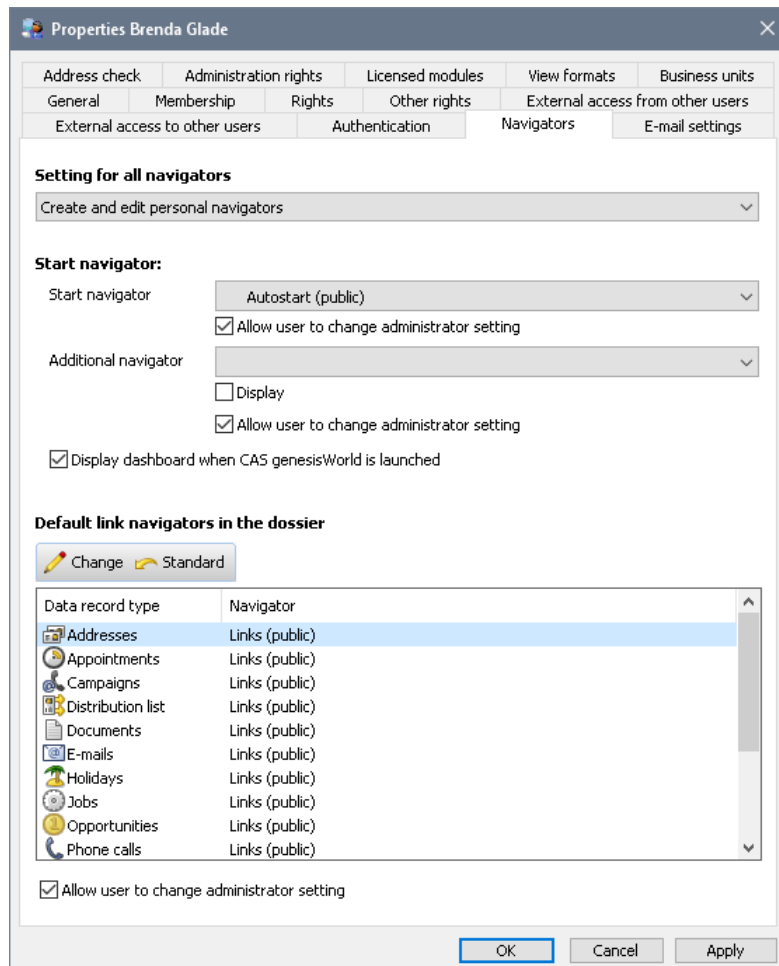
- The document template navigator is only relevant for the desktop client and displays templates for document data records.

In CAS genesisWorld Web, all available document templates that are available for users are displayed in an alphabetically sorted list.

- 🔗 Online Help Desktop Client: [Navigators](#)

Editing navigators

- The rights to create and edit program navigators are defined in the Management Console.



- In the management console, it is also possible to set whether a specific navigator is predefined for users or is additionally provided to the user's own navigator.
- For link navigators, a default can be set for each data record type in the management console. This default applies if a user has not changed the link navigator, for example, if the required rights do not exist. The default applies also in CAS genesisWorld Web and in the Mobile Apps for the display of linked data records in the dossiers of a data record type.



In the **User management** area, go to the **Properties** window and open the **Navigators** tab.

- Creating and editing program navigators is possible only in the desktop client and only for users who have been granted appropriate rights in the Management Console.
 - In CAS genesisWorld Web users can create their own views and unlock them for others, if the respective options have been enabled on the **More rights** tab. You cannot create new views in the Mobile Apps.
- 🔗 Online help Management Console: [Other rights tab](#)

Customizing and predefining public navigators

An **Autostart (public)** navigator is available for all types of navigators and can be also be available for every type of navigator just once. After installing in all CAS genesisWorld languages, these navigators will already have been created and can then be changed if necessary.

With a user account you can create or edit an **Autostart** navigator, if the **Create and edit your own navigators** setting has been enabled.

To edit an **Autostart (public)** navigator, the respective user account requires the **Create and edit public navigators** setting. This also applies for a user account with administrator rights.

The **Autostart** navigator is used automatically by default if no other navigator has been selected. If a special navigator has not been set for a user account and no **Autostart** navigator is available, then the **Autostart (public)** navigator is used automatically.

Besides **Autostart**, you can use as many program and link navigators using random names as you wish as public navigators. Only one single document template navigator can be saved as public navigator. The entered default name of the document template navigator must be **Autostart (public)**.

To ensure that the most important views are available for users in all clients, you can customize the respective **Autostart (public)** navigators.

This respective program navigator can still be used as a start navigator or set as an additional navigator by default.

Employees with suitable rights can create additional navigators and then set these as defaults in the management console as the start navigator for specific user accounts or specific departments or as an additional navigator.

A navigator is variable over several functions.

- Basically, only those data records will be displayed to which the logged on user has access rights.
- For many views in CAS genesisWorld Web and in the desktop client, you can set whether public data records, only data records of the logged-on user or the data records of other users will be displayed.

This also includes rights and the external access of the logged-on user.

- In the desktop client you can enable an option to determine whether or not view should be displayed in both the CAS genesisWorld Web client and in the mobile apps.

The setting is available with most list views.

- View created in CAS genesisWorld Web have no effect on the navigators of the desktop client and are thus specifically for the CAS genesisWorld Web client.

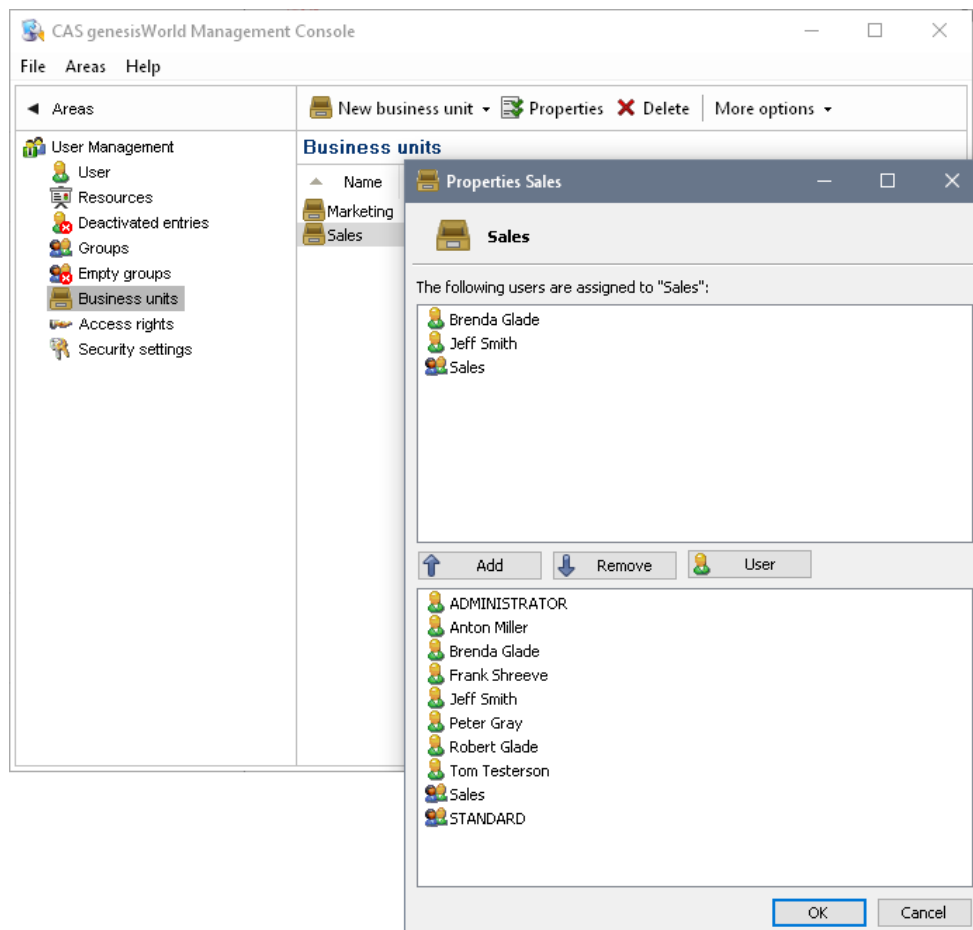
Business units in the public navigator

An adaptive public program navigator can be created for business units. This means, that one navigator displays different views depending on the type of work in a company.

 In the Management Console, go to **User management** area > **Business units**.

 A **New business unit** can have any name.

- ✓ A business unit comprehends the assigned users and groups. This assignment can also be made for the properties of the users or groups.
- ✓ The business unit is assigned to a view in the desktop client. This is possible for logged-on users if the **Create and edit public navigators** setting is defined.
- ✓ The assignment is made via **Properties** in a desktop client view > **Business units**.




If a user account in a public navigator is saved with hidden views for data record types, these views will no longer exist in the navigator after saving. Public navigators with business units should therefore only be changed with user accounts which have been granted full rights to the business unit data record types. This is automatically the case for those user accounts which have the **Administrator** option enabled. If navigators with business units are to be edited by other users, the corresponding access rights to these data records must be entered.

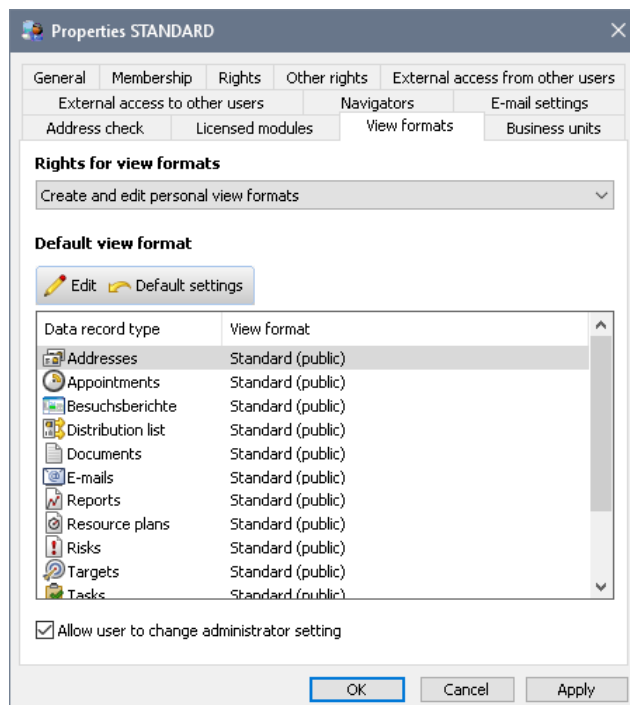
6.4.2 View formats

View formats in lists, determine, for instance, which fields are displayed for specific data record types and which fields are used to sort the lists. These settings apply for all clients. Some settings in a view format such as grouping, fonts or color classification only apply in the desktop client.

Defining default view formats

A **Default view format** is always used if a view format cannot be changed by a user and if no special view format has been set. The defaults for the **default view format** per data record type apply to the same settings for a user account and can be set in the management console as well as in the desktop client. If users have the necessary rights, they can define **default view formats** for themselves in the desktop client.

 To define rights for view formats and **default view formats** in the management console, navigate to the **View format** tab in the **Properties** window of the **User Management** area.



✓ Here you can define the settings for **default view formats** in the **default** user account, these settings are then applied to each new user account.

6.4.3 Dashboard settings

Dashboards consist of elements made up of data records of multiple data record types whose appearance can be customized according to their purpose of team.

- A dashboard as the first view is possible in all clients.

The administrator can assign such a dashboard, for example, as an overview of the current day which displays all open tasks, appointments and phone calls for the logged on user.

Other options include important sales data that can include addresses, team calendars and so on, or the current support status which includes the new service reports, open complaints and any e-mails to which you have yet to respond.

- Administrators create the dashboard in the desktop client or using the App Designer for CAS genesisWorld Web and the mobile apps.
- Users can set in each client whether they wish to see the dashboard displayed as the first view when they first open the client.
- In the desktop client there are more dashboard settings which users can explore.

6.4.4 Configuring the search

Using the different search functions, you can find data records amongst the whole CAS genesisWorld dataset.

In principle, there are 2 types of search, searches which utilize SmartSearch and searches which do not use the SmartSearch functionality. For certain client search functions, either one or the other type of search is used. The administrator can change settings for both types.

Searching specific data record types and the use of jokers, wildcards and placeholders is possible in both types of search.

Search without using SmartSearch

In the desktop client, these search is always used in the **Search** window. In CAS genesisWorld Web and the mobile apps, this search field is always located on the right on the first page of an app.

- ✓ The fields you wish to search using this search function are set in the desktop client, this setting also applies in CAS genesisWorld Web and the mobile apps.
 - ✓ Every user can define the fields to be searched in the desktop client.
 - ✓ Alternatively, the administrator can define the fields as presets, which then apply to users without them having to change any settings themselves.
- 🔗 Online Help Desktop Client: [Field selection for the search](#)

Depending on the capability of the database system being used, you may be able to use a full text search. With this type of search you can find the search term you are looking in any text fields it might occur in.

- ✓ This type of search has to be enabled in the Management Console.
- ✓ In the **Database** area select **General** > **Search** tab.
- 🔗 Online help Management Console: [Using the full-text search](#)

This search is also used without the SmartSearch functionality on the toolbar in the program window of the desktop client.

Searching with the SmartSearch

SmartSearch offers a number of advantages.

- The most important data record types are searched simultaneously.
- The search hits are weighted according to different criteria.
- The administrator can define which data record types and fields are included in the search.
- The SmartSearch functions the same way in all clients.

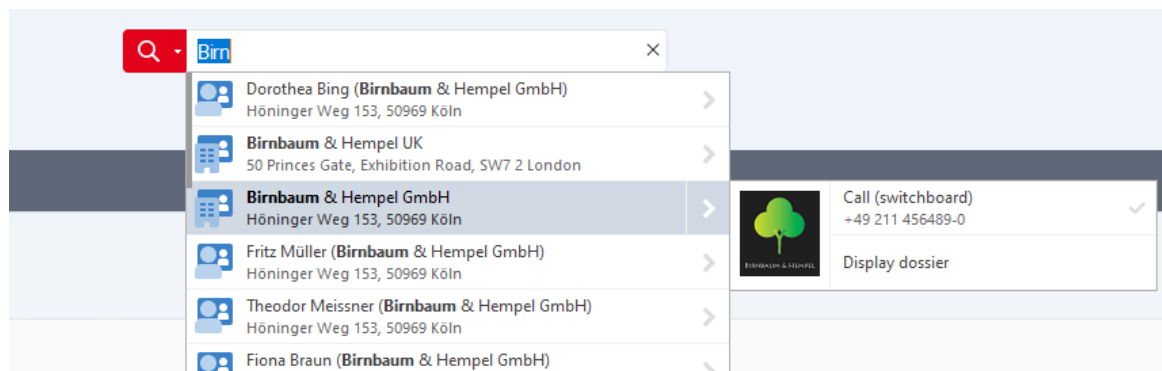
SmartSearch is used with the **Picasso Search** in CAS genesisWorld Web and in the mobile apps

- Several functions in conjunction with SmartSearch simplify other functions in CAS genesisWorld.

For example, when **linking with** an existing data record or when entering a customer in an opportunity, this search functionality is used automatically.

When adding users with access rights to a data record, the user will see immediately whether or not the colleague they wish to add is available during that period.

For search hits, additional functions can be called immediately, such as, call an address or display a dossier.



- ✓ The SmartSearch has to be activated on the **Services** tab in the Server Manager.
- ✓ You can make settings for the application server and enable the SmartSearch in the Management Console. In the **Database** area select > General > SmartSearch tab.

- ✓ You can change or expand the searched data record types and fields in the SmartSearch.
 - 🔗 Online help Management Console: [SmartSearch](#)

6.4.5 Defining system messages

Custom system messages can be displayed in the desktop client and in teamWorks. Those system messages are displayed to the users after logon. You can define custom system messages. Moreover, you can define that the messages only refer to a specific timeframe and a specific client. If required, users can permanently deactivate the system messages.

How it works

The Application Server retrieves the system messages which have been published by CAS Software AG via a web service.

You can create custom system messages in the CustomSystemNews.xml file and save them on the Application Server. The file must be saved in the ..\Program Files (x86)\Common Files\CAS-Software\Server\DotNetData\SystemNews folder.

System messages can be created in any language and are displayed to users in the appropriate language. When users log on, the Application Server checks whether any system messages are present in the language currently being used by CAS genesisWorld.

System message example:

```
<?xml version="1.0" encoding="utf-8"?>
<messages>
  <message id="1" validfrom="2019-09-01" validthrough="2019-10-10" client="CAS genesisWorld" minversion="20.0.0" maxversion="21.1.4" author="CAS Software AG">
    <content language="DE">
      <title>Deutsche Systemnachricht</title>
      <body>Das ist der Text der Nachricht.</body>
    </content>
    <content language="EN">
      <title>English system message</title>
      <body>This is the text of the message.</body>
    </content>
  </message>
</messages>
```

All system messages are stored in the Application Server cache and are updated regularly. As soon as a user logs on, the relevant system messages are transmitted from the Application Server to the client.

6.4.6 Input help

Input assistance options are default values used for specific fields in data record window, such as for addresses in the **Sector** field.

You can create or use input help options in text and number fields. However, input help values are not available for all standard fields of CAS genesisWorld. You cannot define input help options for some text or number fields. In turn, there are some fields for which system input help options have already been defined and thus cannot be changed. For example, the input help option for the **Country** field are fixed and defined with multilingual selection options which comply with ISO 3166 and offer the official country names.

You can use input help in all CAS genesisWorld clients.

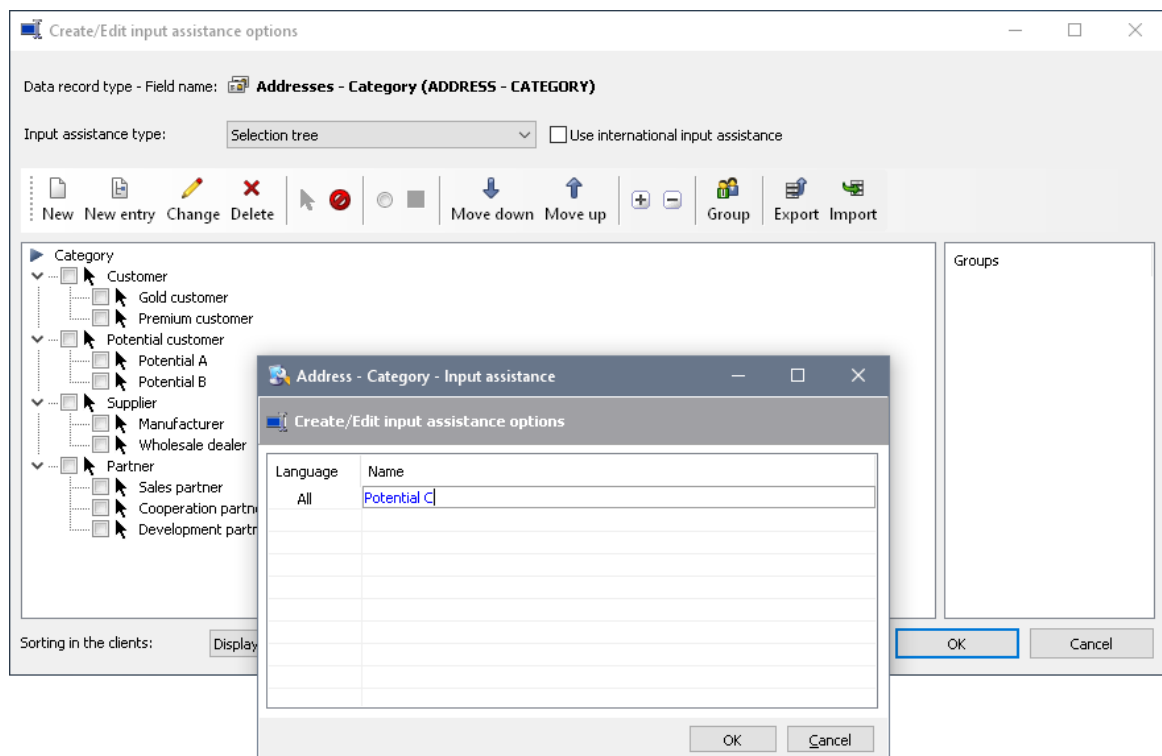
Types of input help

Principally, there are 2 different types of input help options available in CAS genesisWorld.



- Users select one or more entries.

In the Premium Edition, a tree structure is available from which you can select a number of entries in a specific order.

- Users select one or more entries and can also enter any additional text



- ✓ Input assistance options can be created in multiple languages without an input option. Thereby, users always see the input help options in the language they used to log on.

- ✓ Users can sort the display of input help options. When using alphabetical sorting, the language of the logged on user is taken into consideration.
-  You can assign groups of users to an input help option, so that for example, different input help options are available to different departments.
-  To define input help options, go to the Management Console and select the **Database area > Input help.**

The **Input help** button is active for a marked field if an input help option has been defined for the field.

Please note

Changes to input help options will only be visible to users once they have logged on to the client again.

A specific field length has been defined in the **Database** area for each field in CAS genesisWorld, and this is also the case for input help options. Thus, you will only be able to enter as many characters for the input help field as has been defined for the field.


With the **selection tree** for input help options, the length applies to one single input value in total. The selection is saved in the field including pipes as separators, for example, Supplier | Manufacturer | Components | Small components.


Each input help option can be exported and, for example, imported into another database. In the process, an input help option is always imported or exported for a specific data record type and a specific field.

Input help for the Type and Status fields

The two-step input help options are available in the Premium Edition for the **Type** and **Status fields**. In the process, users select an entry for the **Type** field and depending on the type, they can then select from different entries for the **Status** field. The input help options for the **Type** and **Status** fields are thus treated as a single entity.

The input help options are also available for your own data record types. What will not be available for your own data records are the input help options for campaigns, opportunities and distribution lists.

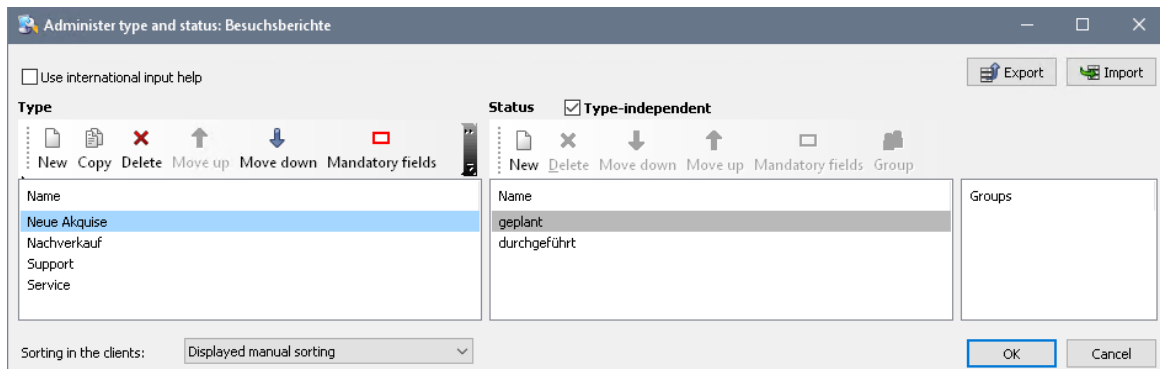
 Online help Management Console: [Input help for the Type and Status fields](#)

 Fields can be defined as mandatory fields if a special Type and/or Status has been selected.

For example, you can define that the **Sector** field needs to be filled in if the **Customer** type has been selected in an address.

Generally valid mandatory fields are also displayed as enabled when displaying mandatory fields in the Type and Status fields. You cannot deactivate these fields in the list for Type and Status fields, because they are valid regardless of the type or status.

? Online help Management Console: [Checking mandatory fields](#)



- ✓ Depending on the selected entry in the Type field, you can set the way the tabs are displayed in the data record windows.

In the **Miscellaneous** area select the > **Display tabs** folder.

If mandatory fields are contained on a tab which is not displayed, then these mandatory fields are not checked when saving. Thus, a user can save a data record even if a hidden mandatory field has not been filled in.

Importing input help options, is the same as creating new import help options for these fields. If, before importing, the display of the tab was dependent on the **Type** field, then you will have to set this again after importing.


6.5 Address settings

In the Management Console different settings are available for addresses for automatic processes, services and presets. Some more comprehensive options are described in the following.

Address check

Automatic address checking is performed when creating or saving addresses. You can define multiple criteria for this. Available criteria can be changed and expanded.

- ✓ More fields can be defined for user accounts which are checked when saving an address.
- ✓ Address data record fields can contain presets on opening, such as **Country (default)**.
- ✓ When entering values into some specific fields, other fields can be completed automatically. For example, the **Town/City** fields is completed when the postal code is entered.
- ✓ Dedicated files on the application server control the criteria for the automatic completion and the address check, these files can also be changed.

 In the Management Console select the **User management** area > **Properties** window > **Address** check tab.

 Online help Management Console: [Address check tab](#)

General presets for addresses and address fields



In the **Miscellaneous** area > select **Addresses** > **General** tab.

The following settings are relevant for many users.

- ✓ The **Country (default)** value as a preset when creating new addresses and in all clients.

The input fields for the postal address in the data record windows match the standards for postal addresses in the selected country. Users can change this default value for each postal address in an address data record.

- ✓ The **Default address** as a preset applies when creating new individual contacts and in all clients.

- ✓ In CAS genesisWorld multiple addresses can be available for one person in different roles, for example, as an employee and as a managing director of a small company.

Such addresses can be linked via identities and are then not considered to be duplicates.

- ✓ You can activate the "diverse" gender as a default value for personal status law.
- ✓ Furthermore, you can define the protocol you decide to use as a telephone number in CAS genesisWorld Web.


 Online help Management Console: [Addresses: General tab](#)

Field synchronization for companies and contact persons

You can set which fields you wish to keep synchronize for the company and contact person fields.

Users can define whether they want to keep the postal addresses of companies and contact persons synchronous. However, to do this, users must have at least **Change** rights to the **Synchronous field values** field.

If users do not have the necessary rights, the **Synchronous field values on/off** option is activated by default when creating a contact person and cannot be deactivated.

 Online help Management Console: [Addresses tab/Field synchronization](#)

Duplicate check

The **Duplicate check** recognizes addresses with very similar fields.

- ✓ In the Management Console you can define when the criteria for a duplicate are met.
 - ✓ You can also set conditions, which when met, result in duplicates being deleted automatically.
 - ✓ By using different functions and modules, unwanted duplicates can occur, for example, when using the import/export wizard or the Event Management module.
 - ✓ To enable the manual merging of duplicates, there are specific requirements which have to be met for conditions and user rights.
- 🔗 Online help Management Console: [Addresses/Duplicate check tab](#)

Services tab

Address services include georeferencing and the Unternehmensverzeichnis.org.

- ✓ To use map-based services, such as the proximity search, location data must be available in form of address coordinates. **Georeferencing** is a method to supplement addresses with their latitude and longitude coordinates and with a factor to define the accuracy of the coordinates.

The necessary Web Services have to be started in the Server Manager, see the section on "Server Manager" on page 43.

- ✓ Unternehmensverzeichnis.org is a free directory of German and Austrian companies and production facilities. Using the EBID number that was automatically assigned by the service, the data of companies saved in CAS genesisWorld can be matched to the information provided by Unternehmensverzeichnis.org. You can flexibly update or complete the data whenever needed.

Additionally, you can unlock more payable content for individual users, for example, SCHUFA complete information (this is a German credit score company).

Some functions from the Unternehmensverzeichnis.org are possible with a connection via the integrated CAS genesisWorld account. For example, certain functions are generally available and premium services are only available to certain employees.

- 🔗 Online help Management Console: [Unternehmensverzeichnis business directory tab](#)

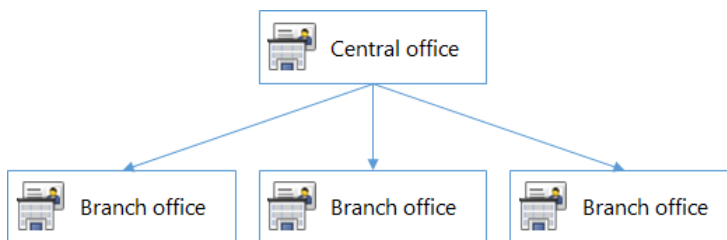
6.6 Links

Certain link types exist as default in CAS genesisWorld. You cannot change these internal link types. Additionally, you can create settings and new link types as administrator.



Select the **Miscellaneous** area in the Management Console.

- The **Contact person** attribute has an available link type for opportunities and addresses. This type is defined as undirected link.
 - 🔗 Online help Management Console: [Link types](#)
- A new link type between addresses could be **Central** and **Subsidiary**. This type is a directed link.



Primary links

Primary links are a special link type and available with the Premium Edition.

The screenshot shows the 'Links' configuration page in the CAS Software Management Console. The 'Primary links' tab is active. The page includes the following sections:

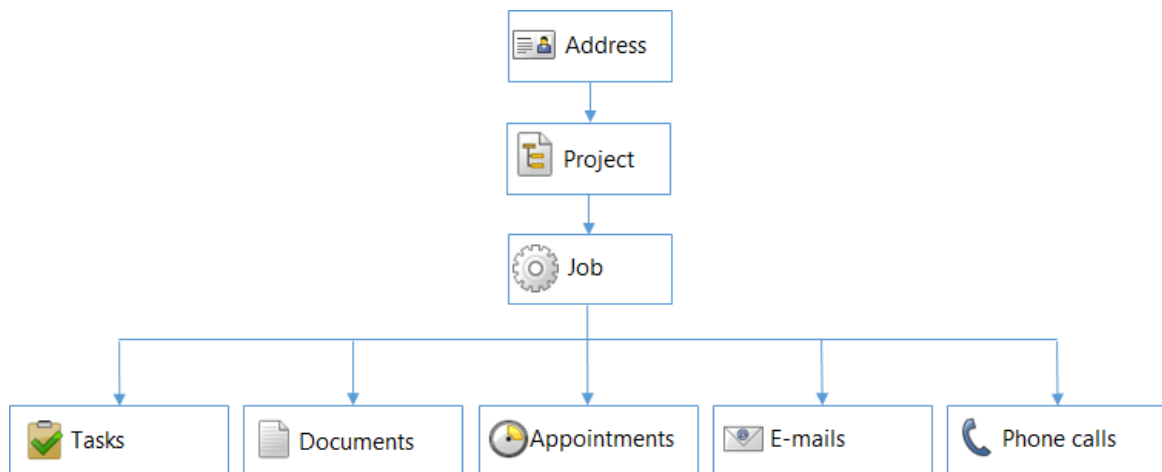
- Activate primary links:** A checkbox that is checked.
- Mandatory primary links:** A table with two columns: 'Data record type' and 'Mandatory link'.

Data record type	Mandatory link
Appointments	X none
Campaigns	X none
Documents	X none
E-mails	X none
Expenses	X none
External services	X none
Items	X none
Jobs	X none
Opportunities	X none
Phone calls	X none
Projects	X none
Questionnaires	X none
- Add participant:** A section for adding participants from parent project to the following data records.
 - Jobs (checked)
 - Tasks (checked)
 - Documents (checked)
 - Appointments (checked)
 - Phone calls (checked)
 - Campaigns (unchecked)
 - Opportunities (unchecked)
 - Questionnaires (unchecked)
- History:**
 - Maximum number of entries you want to save: 20
 - Save from level: Job
- Jobs:**
 - Hide flexible job hierarchy (unchecked)
 - Use the hierarchical display for "Parent" (checked)
- Fields displayed in Parent:**
 - Addresses: Company, First name, Name
 - Projects: Subject
 - Jobs: Subject
- Fields displayed in link wizard:**
 - Addresses: Company, First name, Name, Street, Town
 - Projects: Subject, Tags
 - Jobs: Subject, Tags

Primary links are of the 1:n link type. This means that you can assign any number of child or subordinate data records to one parent data record. You can only assign exactly one parent data record to a subordinate child data record.

By default, an address is the initial parent data record to which you link other data records using primary links. You cannot change this default setting. On the following subordinate child levels of primary links, you can link projects and then jobs. Below the job child level, you can set up any number of further job levels. You can also leave out the jobs level. After you have linked jobs, you can link tasks, documents, appointments, e-mails, and phone calls.

The following figures show the maximum number of hierarchy levels that can be build with primary links.



Parent data records can have multiple primary links linking child data records. Child data records have exactly one primary link to a parent data record. For example, a specific project has one primary link to an address. The address however is linked with multiple projects. Following these rules, a hierarchical structure is built.

You can define hierarchical relationships through primary links, for example, between addresses, projects, jobs, appointments, tasks, documents, phone calls, and e-mails.

In the settings, you can determine if you wish to use primary links or **mandatory** primary links, otherwise a data record cannot be saved.



Select the **Miscellaneous** area > **Link**.

🔗 Online help Management Console: [Overview primary links](#)

✓ In clients, buttons for viewing and editing primary links are available under the Parent label.

Primary links are also displayed in the dossier for all the clients.

You will find additional information for users in the respective online help resources for the desktop client, for CAS genesisWorld Web and the mobile apps under the search term **Primary links**.

6.7 Miscellaneous area



You will find a lot of settings for general data record settings, views and functions in the **Miscellaneous** area of the Management Console.

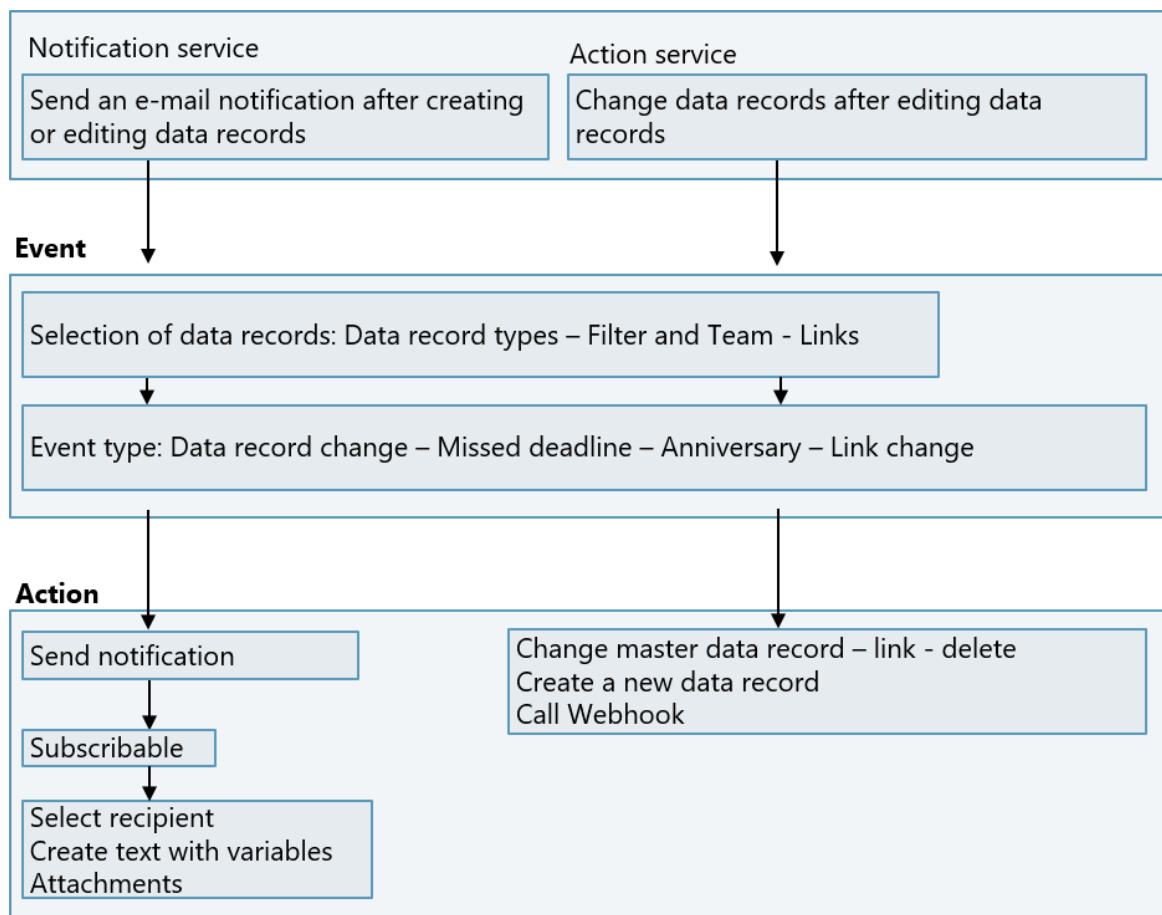
A number of points such as duplicate checking or links have already been covered here in the manual. Other settings relate to the display of data such in places such as the dossier, the dashboard or the display of tabs. Other settings relate to data record types such as appointments as activities, numbers for data records, the last contact for an address, or a project via a phone call, an e-mail, a document or an appointment. Furthermore, overarching settings are defined such as possible logons via OAuth2 or currencies.

After entering a module license, settings can be added in the **Miscellaneous** area. An example of this is Survey.

6.8 Rules: notifications and actions



In the Rules area of the Management Console, you can create, edit and manage the notification and action service.



Rules are used to trigger specific events, perform specific actions or send e-mail notifications. Thereby, you can automate various processes and routine tasks in your company.

Rules always apply for a specific data record type, that means, you cannot apply a rule to multiple data record types simultaneously. Rules can be applied to data record types from add-ons as well as your own data record types.

Rights

The **Rule administrator** rule on the **More rights** tab is automatically activated for the **Administrator** user account and cannot be deactivated.

Users with the **Rule administrator** right can create, edit and manage rules in the **Settings** window of the desktop client, for more information see the section on "Special settings for special rights on page 57. With the **Rules** right, users have access to the **Rules** area in the Management Console. The **Rule administrator** right is enabled automatically when you activate the **Rules** right.

Without the **Rule administrator** right, users can view rules and activate or deactivate subscribable rules. Users can always create rules for e-mail mailboxes used in CAS genesisWorld.

Managing and editing rules is possible with the same settings in the management console and the desktop client, except for the server settings. The respective help pages are also the same.

 Online help Management Console: [Rules: Settings](#)

Rules for actions and notifications

- With rules for actions for example, data records can be created or changed and links can be entered if a specific event occurs.
- When working with rules for notifications, users or other recipients receive an e-mail containing a text which is defined via variables.

Settings for company internal recipients and external recipients can be very complicated. We recommend you perform comprehensive tests for differentiated settings.

The variables used for the text refer to field changes, changed fields and address fields for recipients.

Text variables are available in multiple languages. For notifications in multiple languages, only the text without variables should be translated. Additionally, suitable language packages have to be installed and language support for multiple languages needs to be enabled on **Server settings** tab.

You can open changed data records in the desktop client or in CAS genesisWorld Web via the change notification. For this, the e-mail can contain a .gbt file or a link to an appointment or to a task and so on.

Users receive notifications voluntarily via subscriptions. Alternatively, mandatory notifications are also possible, users always receive mandatory notifications.

6.8.1 Server settings

Multiple settings are necessary for using the action and notification service, you will find these on the **Server settings** tab. This tab is only available in the Management Console.

- ✓ The notification and action service is started and stopped on this tab.

When updating CAS genesisWorld, the service is automatically stopped and then restarted.

- ✓ You have to enter an application server for the service.

You can set another application server for each rule. This can help to maintain performance if certain rules are being executed frequently.

If the action and notification service is being used intensively, then we recommend that you use your own application server.

- ✓ You require a valid e-mail account to use the notification service. E-mails will only be sent via this account, thus, it is possible to use an SMTP account.
- ✓ To ensure that e-mail notifications contain a link to a data record in CAS genesisWorld Web, you have to enter the **URL for CAS genesisWorld Web**.

If notifications are to be sent in multiple languages, then the **Language support settings** are necessary.

- 🔗 Online help Management Console: [Server settings](#)

6.8.2 Performance

As administrator, you can control the load of the notification and action service on the Application Servers using a number of settings, initially via the monitoring interval and a schedule.

Depending on the workload of the Application Server, the service is always only running for a limited time so as not to block the Application Server. During this time, all rules are executed once. The duration may vary depending on the configuration of the rules. After that, the service is inactive for the defined interval. After the pause, all rules are executed again. Therefore, you may encounter intervals of different time lengths between an event occurring and an action being triggered.

- ✓ When setting the **monitoring interval**, you define the intervals in which the service for monitoring data records checks all the rules. If an event occurs, then the respective rules and actions are executed.
- ✓ Set up a **Schedule** if you do not want to execute a rule, for example, each week day. The schedule applies in addition to the monitoring interval, that is, depending on the settings for the schedule, a rule can be executed at specific times, or more often or less frequently than scheduled in the monitoring interval.

Apart from the monitoring interval and schedule, you should check the following points regarding performance:

- Do too many users have the **Rule administrator** right?
- Are the rule administrators sufficiently informed and do they know the limitations of the service?
- Can I restrict the rules?
- Distribute rules across multiple application servers or set up your own application server for the notification and action service, see the chapter on "Server settings" on page 78.

6.8.3 Cycles and limits

You have to take additional points into consideration with the action and notification service:

- Multiple rules from one or more users can lead to cycles through which changes are made or new records are created endlessly.

Example: User A created a rule which checks the status of a task. If a task has the X status, an appointment of the Y category is supposed to be created. User B creates a rule which checks the category of an appointment. If an appointment of the Y category is created, a task with the X status is supposed to be created.

These two rules result in a cycle which cannot be identified automatically as a cycle by the CAS genesisWorld Application Server.

- Only one action can be executed per rule. You need to define multiple rules if you want to execute multiple actions.
- Using the notification and action service, you cannot create multi-step workflows including conditions, paths, and so on.

7 Available options for logging on

Multiple options are available for logging on to the CAS genesisWorld clients, which can in part be combined and which are also partly available in all clients. Before exporting, you may have to log on using your CAS genesisWorld credentials.

The settings for these options are made in several programs, therefore an overview is described here in the manual.

You can logon using the **Administrator** user account which is automatically available after installation. With this user account, you can log on to all clients with a blank password, and then create a password for yourself immediately.

The following options area available, however, their availability for user clients depends on the respective settings:

- You can log on in all clients using your CAS genesisWorld user name and password.
In the case of clients for administrators, logging on is only required for the management console and is only possible with a CAS genesisWorld user account.
- You can log on to the clients using your Windows username and password, that is: the desktop client, the CAS genesisWorld Web client and the mobile apps.
 - 🔗 Online help Management Console: [Authentication tab](#).
- Logging in with <ntuser> is done using the current Windows user and is a special case with special conditions.

- The database wizard requires access to the database for the application server. For this purpose, a user account for the database system or Windows authentication can be used when creating or connecting a database.

[? Database Wizard](#)

- Using the CAS Authentication Server, it is possible to log on via the web interfaces for: CAS genesisWorld Web, the mobile apps, the Microsoft Outlook Add-In and the CAS Smart Add-on.
- Login via OAuth2 is possible for some external services and mandatory for others.

You can think of a logon using a user name and password as being the same as a general key for a building. This is less desirable, especially if such a master key is used over the Internet. Token-based authentication, on the other hand, is a key that is only valid for a specific apartment in the building, as well as for a specific time, and can become invalid on its own. A token-based logon is available with the CAS Authentication Server on CAS genesisWorld Web and for the mobile apps, and OAuth2 for e-mail accounts and teams on CAS genesisWorld.

7.1 Using your CAS genesisWorld user name and password

Settings for this variant can be viewed and changed in the management console:

- Define a **name** for the user account

User management area > **User properties** > **General** tab

[? General tab](#)

- Defining a **password** for the user account

Alternative: Leave the password blank in the management console and set it in a client for users

Please note: You cannot define a password in the mobile app.

User management area > **User properties** > **General** tab

[? General tab](#)

A password for CAS genesisWorld is necessary, if you are required to enter a password before exporting data using the desktop client.

[? Security settings](#)

7.2 User name and password of Windows

The settings for this scenario can be viewed and changed in the management console.

- CAS genesisWorld includes an integration to Microsoft's Active Directory Services.

Using this integration, the name, description and e-mail address of a user account are transferred from the Active Directory Services to CAS genesisWorld.

You define the transfer using identical functions when importing user accounts, when synchronizing and when mapping a single user account.

[? Active Directory Integration](#)

[? Importing Windows users](#)

[? Authentication tab](#)

- The allocation of the CAS genesisWorld user accounts to the respective Active Directory user accounts can only take place within a company intranet.

Outside of the intranet, users can log on with CAS genesisWorld Web or the mobile apps via Active Directory, if you define LDAP access.

[? Defining LDAP access](#)

A Windows account can be locked after several incorrect entries.

[? Checking of logon trials.](#)

7.3 CAS Authentication Server

The authentication process is performed with the **CAS Authentication Server**, which is based on the OAuth2.0 and OpenID Connect protocols. You have to enable the service in the Server Manager. Further settings, for things like ports, reverse proxy and if necessary for load balancing are also made in the server manager.

[? CAS Authentication Server](#)

- If the service is enabled, users can log on to the following via the logon page of the authentication server: CAS genesisWorld Web, the mobile apps, the Microsoft Outlook Add-In and the CAS Smart Add-on.
- On the authentication server logon page, the **Use Windows Logon** button is available for CAS genesisWorld Web if this type is set for the OAuth2 client.

This type of logon is based on the logon settings in the management console when logging on with your Windows user name and password and is independent of the CAS Authentication Server.

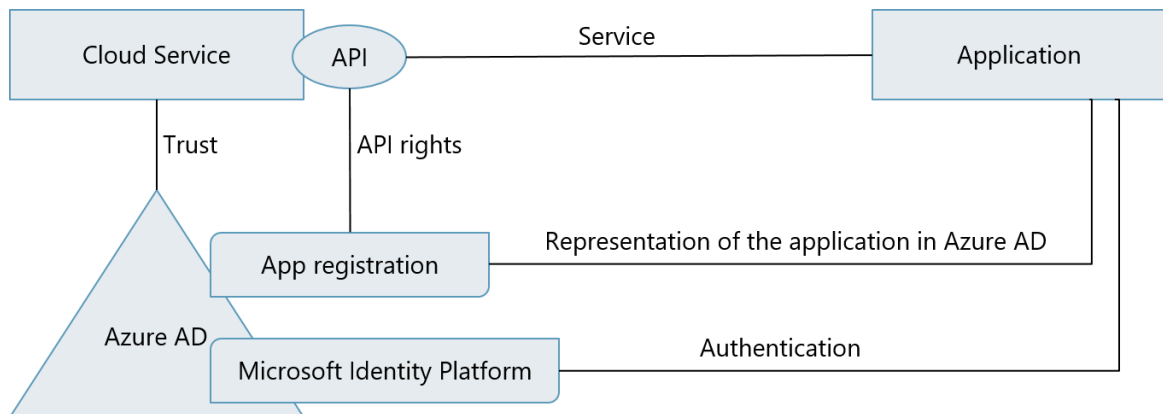
7.4 Logging on to external service using OAuth2

It is also possible to use a token-based logon via an external provider with OAuth2, for example, for e-mail accounts and for Microsoft Teams. For this, multiple settings in different programs are necessary.

How it works

The following describes Azure AD as an example. Other providers are also possible.

To manage access rights with Exchange Online via the Azure Active Directory (Azure AD) for CAS genesisWorld you have to register an app.



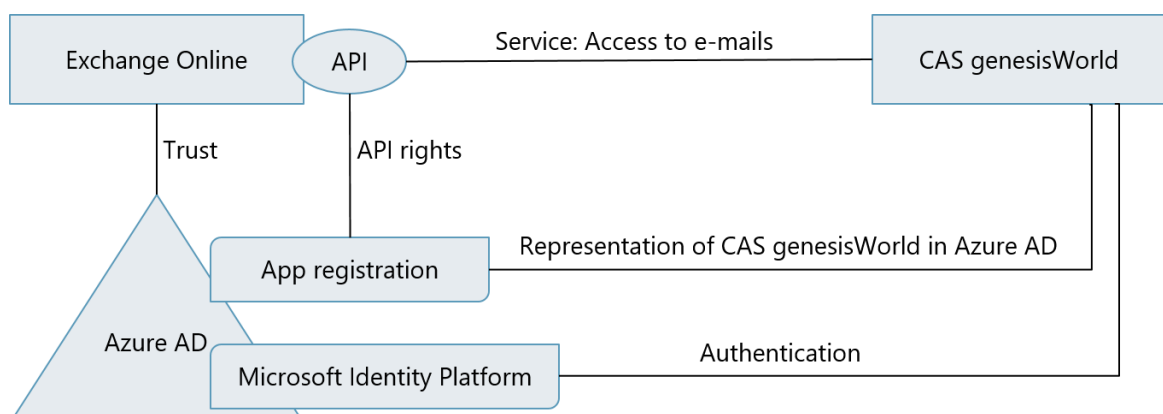
The app enables the integration of CAS genesisWorld with the Microsoft Identity Platform. Registering the app enables the following among other things:

- Exchange of a secret with the Microsoft Identity Platform, to verify the CAS genesisWorld identity.
- In the process, you have to decide whether the logon over the registered app will only be allowed for users of an organization: Single-instance app.
- Furthermore, users can also be enabled to log on with any business, school or university account: multi-instance application.
- An additional option is to allow the use of personal Microsoft accounts.

For more information see the documentation from Microsoft on the Azure Active Directory.

- You can request API rights via the app, for example, for the **user.read** area. This area grants the right to read the profile of the logged-on user.

Once the app is registered, it is given a unique identifier that is provided when tokens are requested for the Microsoft Identity Platform.



Procedure

When setting up OAuth2 we recommend you use the following approach.

- ✓ Register the CAS genesisWorld for IMAP and CAS genesisWorld for Teams applications with the Microsoft Azure Portal.

For SMTP you do not require any additional applications in the Microsoft Azure Portal, with CAS genesisWorld for IMAP the SMTP protocol is also supported automatically.

- ✓ Subsequently, each registered application is entered as an **OAuth2 provider** with the respective parameters in the **Miscellaneous** area of the management console.

[? OAuth2](#)

- ✓ Now create e-mail accounts in the management console for the user accounts.

[? E-mail settings tab](#)

You can now select **OAuth2** as the **authentication method** in **Server information for the e-mail account**.

From the **Provider (OAuth2)** drop-down list, select the entry which you entered into the management console as the **OAuth2** provider and use this as the logon name and password. Registering with the OAuth2 provider can be skipped and all settings for an account can still be saved.

When the e-mail account is accessed, the system checks whether there is a valid authentication for a user account with the OAuth2 provider. This is done via the desktop client's e-mail client.

- ✓ You can send messages for different events via the server manager. It is also possible to use **OAuth2** as the **authentication method**.

[? E-mail/Messages tab](#)

- ✓ Messages can also be sent via the update service, you can also use **OAuth2** here too, see the section of "Notifications" on page 33.

- ✓ The **Application ID**, **Client secret**, and **Port/Port area** parameters for the OAuth2 provider can be saved in a file in the Management Console, the Server Manager, and the configuration wizard of the Update Service. You can load the data in the Server Manager and in the Update Service.

Employees need information about authentication with the OAuth2 provider. If e-mail accounts are created or modified by employees, corresponding information is also required for the creation or properties of e-mail accounts with OAuth2 as the authentication method. If e-mail accounts are set up by the administrator, employees also need information about this type of identification: In the desktop client, the first time e-mails are viewed, e-mail views are opened, or server-side e-mail rules are executed, the e-mail account logon page opens with the OAuth2 provider and users must enter a password.

No settings are required by users to use Teams via an OAuth2 provider.

7.5 Passwords in CAS genesisWorld

Logons are necessary for all CAS genesisWorld clients. Especially the clients for administrators which have some special features.

Database

To access a database using the Microsoft SQL Server, you have to use the **sa** user or a database user with the **db_owner** role. The password of this user must not remain empty.

If you want to use the Windows authentication, both the currently logged on Windows user and the Windows user entered for the Application Server require administrator rights to the Microsoft SQL Server.

Application server

You need a Windows user with administrator rights to register the Application Server. Additionally, this user needs access to the Document Archive folder.

Management Console

If you start CAS genesisWorld with a new database, you can log on using the **Administrator** user. The password field is empty and a password should be assigned as soon as possible to prevent unauthorized persons from accessing the CAS genesisWorld administration functions.

Passwords are issued in the Management Console for additional user accounts with the **Administrator** right or administrator rights, for more information see the "Special settings for special rights" section on page 57.

Clients for users

Logging on is done using the details specified for a user account in the Management Console.

A password can be set by the administrator for logging on with the CAS genesisWorld user name and password.

The password applies in all user clients. You can change your password in all clients except for the mobile app.

8 How does the e-mail integration work?

In the "[First steps](#)" manual, you will find an overview of the e-mail integration in CAS genesisWorld.

This section in the manual covers the basics on e-mail accounts, the e-mail server and settings in CAS genesisWorld for the administrator.

- Each user account requires a unique e-mail address, see the section on "E-mail addresses" on page 48 and the section entitled a default e-mail account.
- With the necessary rights, users can also create e-mail accounts.

Therefore, depending on the account, the settings in the desktop client and in the management console affect the same e-mail account.

- There is an e-mail client in the desktop client, for which the default account or any other e-mail account set up can be used.

When working with CAS genesisWorld Web and the mobile apps, several functions of CAS genesisWorld can be used for e-mails when Microsoft Outlook is used simultaneously via the CAS Outlook Add-In.

If an e-mail account is set in the desktop client, mailings can also be sent in CAS genesisWorld Web.

- Archived e-mails are a data record type from CAS genesisWorld with the usual functions, for example, rights settings or links.
- Archived e-mails can have the usual list views available in CAS genesisWorld, which contain additional functions for editing e-mails.
- You can access archived emails using all the available lists in all the user clients.

8.1 E-mail server

The CAS genesisWorld e-mail client supports the IMAP e-mail protocol according to the defined standard.

Some e-mail servers and providers do not comply with the defined standard and as a result may not work with CAS genesisWorld. Therefore, you must only use those e-mail servers or e-mail providers that have been approved by CAS Software AG. You will find more information on CAS genesisWorld's approved e-mail servers and e-mail providers under this current link [Release notes](#) on hilfe.cas.de.

CAS Software AG does not guarantee or support any e-mail server that has not been released or approved for CAS products.

Requirements

An e-mail server must fulfill at least the following requirements:

- The e-mail server must be multi-session capable.

- The number of simultaneously open connections for a user should be set to at least twenty. The reason for this is that CAS genesisWorld refreshes the e-mail of multiple mailboxes at the same time and a user can have several e-mail windows open simultaneously.
- You should ensure that the e-mail server and the CAS genesisWorld Application Server are not installed on the same computer. Avoid such a configuration or test it with respect to system stability and performance.

8.2 Central presets and view presets

Central presets apply to all users and e-mail accounts. Presets for views provide access to emails or archived e-mails in all clients for users.

Central default settings



Select Management Console > **Miscellaneous** area > **E-mail**.

- ✓ On the **General** tab you can set, for example, time intervals for automatic actions, or transfer e-mail addresses from the global address book on the Microsoft Exchange server.

Furthermore, you can define the maximum number of e-mails which can be sent during a specific time period. This can be important with e-mail campaigns.

- ✓ On the **Archived e-mails** tab, you can for example, set that archived e-mails are automatically linked with data records.
- ✓ On the **Global e-mail signature** tab, you can enter a uniform signature.
- 🔗 Online help Management Console: [E-mail settings](#)

View presets in the desktop client

In navigators in the desktop client you can configure the settings for an e-mail view, so that only the e-mail account for the currently logged on users is displayed.

- ✓ To do this, open the public program navigator **Autostart** as the administrator in the desktop client.
- ✓ Create an **E-mail view (mailbox)** and set the **Default account** as the e-mail account.
Now, if a random user, uses the public program navigator **Autostart**, then this user's e-mails will be displayed with the view and the subordinate views.
- 🔗 Online help Management Console: [Personal e-mail accounts in public navigators](#)

View presets in CAS genesisWorld Web and the mobile apps

In CAS genesisWorld Web and the mobile apps, you can display e-mail views for archived e-mails.

- ✓ For this, create suitable list views in the public program navigator Autostart, see the section on "Customizing the public navigator" on page 63.
- ✓ Alternatively, public navigators for business units such as for e-mail addresses are also possible: **info@company.co.uk**, for more information see the "Business units in the public navigator" section on page 64.

🔗 Online Help Desktop Client: [List view properties \(archived e-mails\)](#)

8.3 Other e-mail clients

An e-mail client is already integrated into the desktop client. In the desktop client you can switch between e-mail clients in the settings.

In CAS genesisWorld Web and in the mobile apps, when you click an e-mail address, the default local program for e-mail is used. An add-in is available for CAS Microsoft Outlook. The add-in provides a connection between CAS genesisWorld and Microsoft Outlook.

This makes functions and data from CAS genesisWorld available in Microsoft Outlook, e.g. archiving e-mails, functions for invitation management, transferring addresses, appointments, tasks and attachments, or displaying and searching for data record types from CAS genesisWorld.

- Many CAS genesisWorld functions are thus also available in Microsoft Outlook, if the desktop is not installed.
- The add-in for Microsoft Outlook will be installed with the desktop client. Without the desktop client, users will have to perform a separate installation.
- The add-in must be used to authenticate for CAS genesisWorld via the Windows logon or CAS genesisWorld user name and password.
- The use of Microsoft Outlook and the CAS Outlook Add-In is also possible when using the desktop client, either in addition to or as an alternative to using the e-mail client in the desktop client.

🔗 Online help Management Console: [Configuring the Microsoft Outlook Add-In](#)

🔗 Online Help Desktop Client: [Configuring the Microsoft Outlook Add-In](#)

9 Backing up

When using CAS genesisWorld, backing up data is important.

Data from CAS genesisWorld is saved to the database and to the document archive. Your backups should also allow for e-mails which are not CAS genesisWorld data records.

Furthermore, CAS genesisWorld can be extensively customized, e.g. in address validation, in clients such as CAS genesisWorld Web and the mobile apps, or in portals such as Helpdesk or Survey. In these cases, backups are also necessary.

9.1 Backing up databases

The data of all data record types is stored in the database. Other data is also stored in the database, for example, user accounts, licenses, Management Console settings, and so on.

Database systems such as Microsoft SQL Server have special backup functions.

9.2 Backing up documents

Archive files are not saved to the database, but instead they are saved to the document archive, for more information see the "Structure of CAS genesisWorld" section on page 6. You need to create a separate backup of the Document Archive.

9.3 Backing up e-mails

In this case, you have to differentiate between archived e-mails, e-mails in mailboxes and e-mails in folders which are available offline.

- Archived e-mails are CAS genesisWorld data records, these are saved to the database. When saving the database, the archived e-mails are also saved.

E-mails and attachments can be archived to the document archive and are thus included when backing up the document archive.

- E-mails in mailboxes are stored on an e-mail server, and are thus not classified as CAS genesisWorld data records. Data and mailboxes on the e-mail server have to be backed up separately.
- If local folders are used with the desktop client, then you can save the e-mails to a folder of your choice. Those folders need to be backed up in appropriate intervals.

Make sure that you do not run a virus scan on these folders because this might change or delete the e-mails.

9.4 Saving customizations

CAS genesisWorld offers a number of options for customizing specific functions, clients and portals.

The following general rule applies: If changes are not made directly in the Management Console and, if data is changed outside of CAS genesisWorld, then special backups of this data will be required.

The following -although not exhaustive - covers the most important cases and shows you how to secure your data or folders:

- Changes for address checking and SmartSearch occur via XML files.
- Changes to CAS genesisWorld Web and the mobile apps are performed through the App Designer using files in specific folders.
- Customized files are also available for portals such as teamWorks, Helpdesk and Survey.

As a rule, the following can apply: If you are going to customize files, then these files should be backed up.

When updating the software, the customized files are partially overwritten, so that a back is also necessary for a new customization.