



Remote Support Platform (RSP) for SAP Business One

Best Practices Guide

SAP Business One Rollout, SAP
March 5, 2018

CUSTOMER

Introduction

- This Best Practices guide provides recommended settings in remote support platform for SAP Business One
- These recommended settings allow a most effective use of the remote support platform, while guarantying data security
- For detailed information on security, see following FAQ:

[FAQ on Secure Usage of RSP for SAP Business One](#) (also available in [German](#))

Agenda

➤ Preparation work

- Request a Technical User
- Request a classical S-User

➤ Initializing the System

- General Settings
- WebDAV Configuration
- Tasks
- Task Results
- Download & Upload

➤ Customizing

- Partner Test Environment
- Automation at Customer Side
- Reporting
- Import Notes

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Preparation work

Please perform the following steps before configuring RSP, as the below user types will be needed in the RSP configuration:

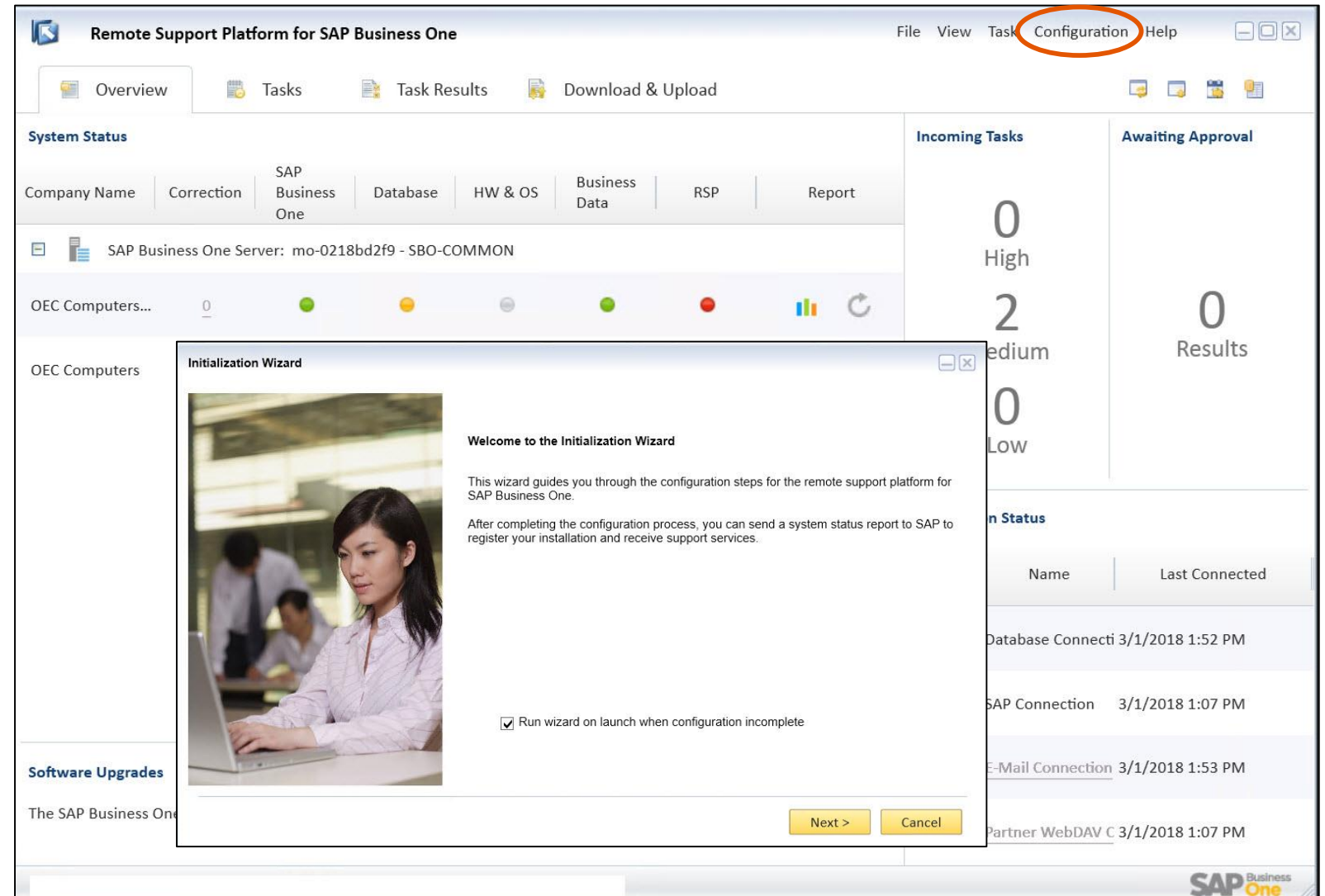
1. As of RSP 3.2, a **technical User** must be requested and activated.
This technical user is necessary in order to retrieve SAP tasks and send the task results back to SAP, once these are approved.
 - See [slide 7](#) for configuration details
 - See [SAP Note 2063077](#)
2. Create a **classical S-User** – This user type is necessary in order to:
 - Perform software downloads via RSP (see [slide 9](#))
 - Book Remote services (like GoToAssist or SAP Remote Connection; see [slide 14](#))
 - See the [Administrator's Guide to the SAP Remote Connection for SAP Business One](#)

This S-user should be created under the Customer number and be granted following authorizations:

- INSTPROD - Edit System Data
- SVER - Open Remote Connections
- PWCHGE - Edit all Login Data
- PWDISP - Edit my Login Data
- SWDOWNLOAD - Software Download

Initializing the System - General Settings 1/4

The first settings should be made via the Initialization Wizard under Configuration → Initialization Wizard



Initializing the System - General Settings 2/4

- Proxy Server

- System Identification

Maintain either the path to the license file or license information (as system/installation number)
See [SAP Note 2414424](#) in case of issues

Copy the entire installation and system number including all the zero's ("0") from the license file

```
----- Begin SAP License -----  
SAPSYSTEM=B01  
HARDWARE-KEY=Y1934509107  
INSTNO=00[REDACTED]  
BEGIN=20080130  
EXPIRATION=99991231  
LKEY=[REDACTED]  
SWPRODUCTNAME=PROFESSIONAL_MSS  
SWPRODUCTTEXT=Professional User  
SWPRODUCTLIMIT=0000000099  
SYSTEM-NR=000000000[REDACTED]  
----- Begin SAP License -----
```

Initialization Wizard

SAP Channel

Enter the location of a valid SAP Business One license file or manually enter your license information. To configure the connection to the SAP Channel, enter your S-User credentials.

System Identification

☐ Use License File

☒ Enter License Information

System Number: 000000000[REDACTED]

Installation Number: 00[REDACTED]

SAP Authentication

☒ Technical S-User

S00[REDACTED]

Password: [REDACTED]

Test Connection

< Back Next > Cancel

- SAP Channel

As of RSP 3.2, a **technical S-user** must be requested, activated, and be configured in RSP.
Make sure to **test the connection**!

[SAP Note 2063077](#)



Tip: make sure to use the capital "S" in the S-User ID

Initializing the System - General Settings 3/4

- E-Mail Channel

Agent's email address = sender's email

Note: This email address must be known by SMTP-Server, otherwise it will be handled as SPAM.

- Select monitored databases

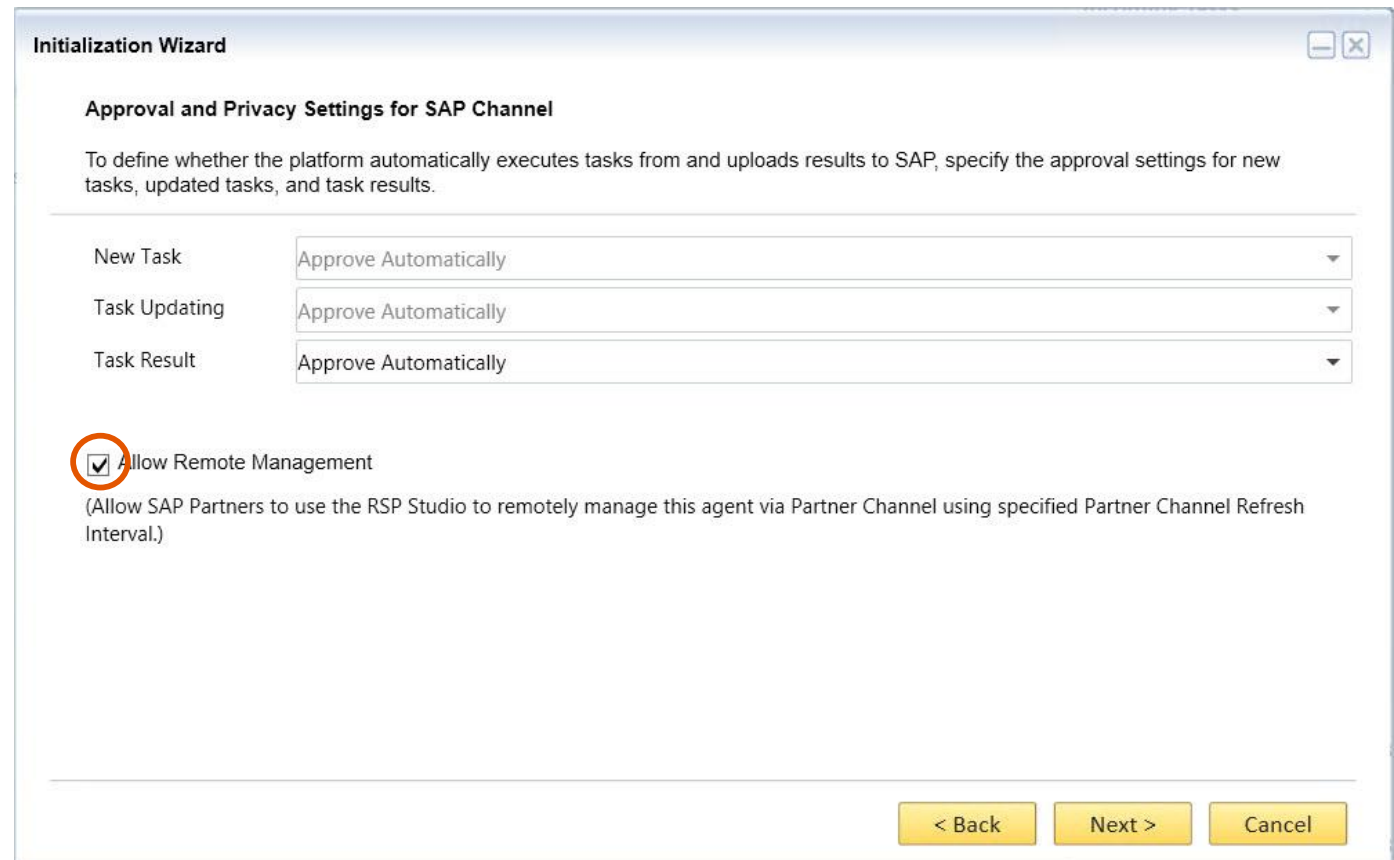
- Approval Settings for SAP Channel and Partner Channel

Best Practice:

Set them to 'Approve Automatically'.

The setting '**Allow Remote Management**' allows SAP Partners to perform remote task management for this RSP installation via the RSP Studio.

SAP Note [1593180](#)



The screenshot shows a window titled "Initialization Wizard" with a close button in the top right corner. The main heading is "Approval and Privacy Settings for SAP Channel". Below this, a text block states: "To define whether the platform automatically executes tasks from and uploads results to SAP, specify the approval settings for new tasks, updated tasks, and task results." There are three dropdown menus, each with "Approve Automatically" selected: "New Task", "Task Updating", and "Task Result". Below these is a checkbox labeled "Allow Remote Management" which is checked and circled in red. A note below the checkbox reads: "(Allow SAP Partners to use the RSP Studio to remotely manage this agent via Partner Channel using specified Partner Channel Refresh Interval.)". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

Initializing the System - General Settings 4/4

- Software Updates
S-User needs software download authorization
[SAP Note 1882682](#)

Best Practice:

Use a customer S-user, not a partner S-user

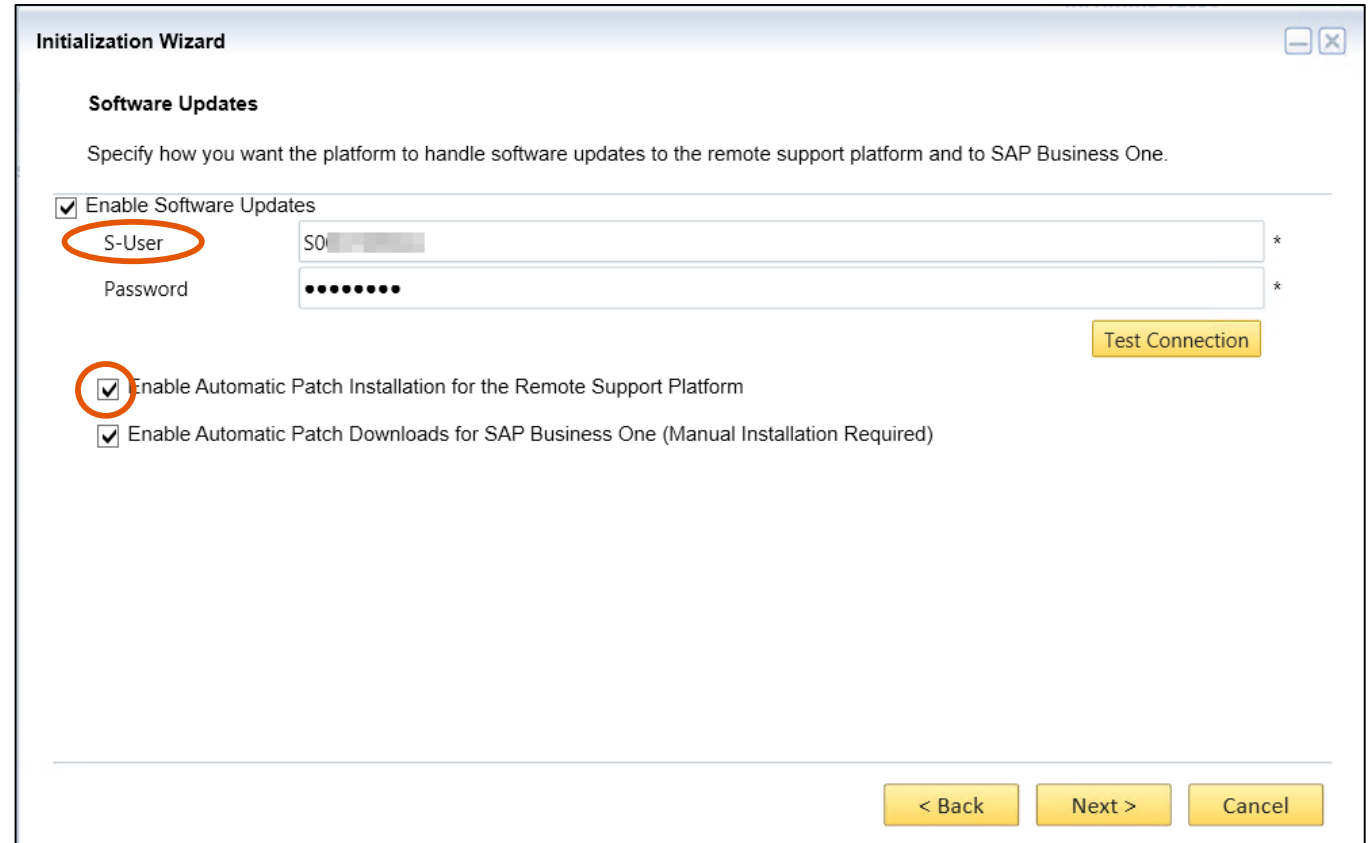
Best Practice:

“Enable Automatic Patch Installation for the Remote Support Platform” should be activated so that RSP is always at the latest patch level.

The patch level of RSP is independent from SAP Business One product version and patch level.

- Configuration finished
Save the settings into a Configuration Template.
Note: This configuration template can be used for further RSP installations.
To do so, select the template in step 1 of the Initialization Wizard.

- RSP can now be used with these general settings.



The screenshot shows the 'Initialization Wizard' window with the 'Software Updates' section. The text 'Specify how you want the platform to handle software updates to the remote support platform and to SAP Business One.' is displayed. Below this, there are two main sections. The first section, 'Enable Software Updates', has a checked checkbox. Below it, the 'S-User' field is circled in red and contains the text 'S01'. The 'Password' field is also present. A 'Test Connection' button is to the right. The second section, 'Enable Automatic Patch Installation for the Remote Support Platform', has a checked checkbox, which is also circled in red. Below it, there is another checked checkbox for 'Enable Automatic Patch Downloads for SAP Business One (Manual Installation Required)'. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'.



Tip: make sure to use the capital “S” in the S-User ID

Initializing the System - WebDAV Configuration

Description of WebDAV Configuration in

SAP Note [1697750](#) (IIS)

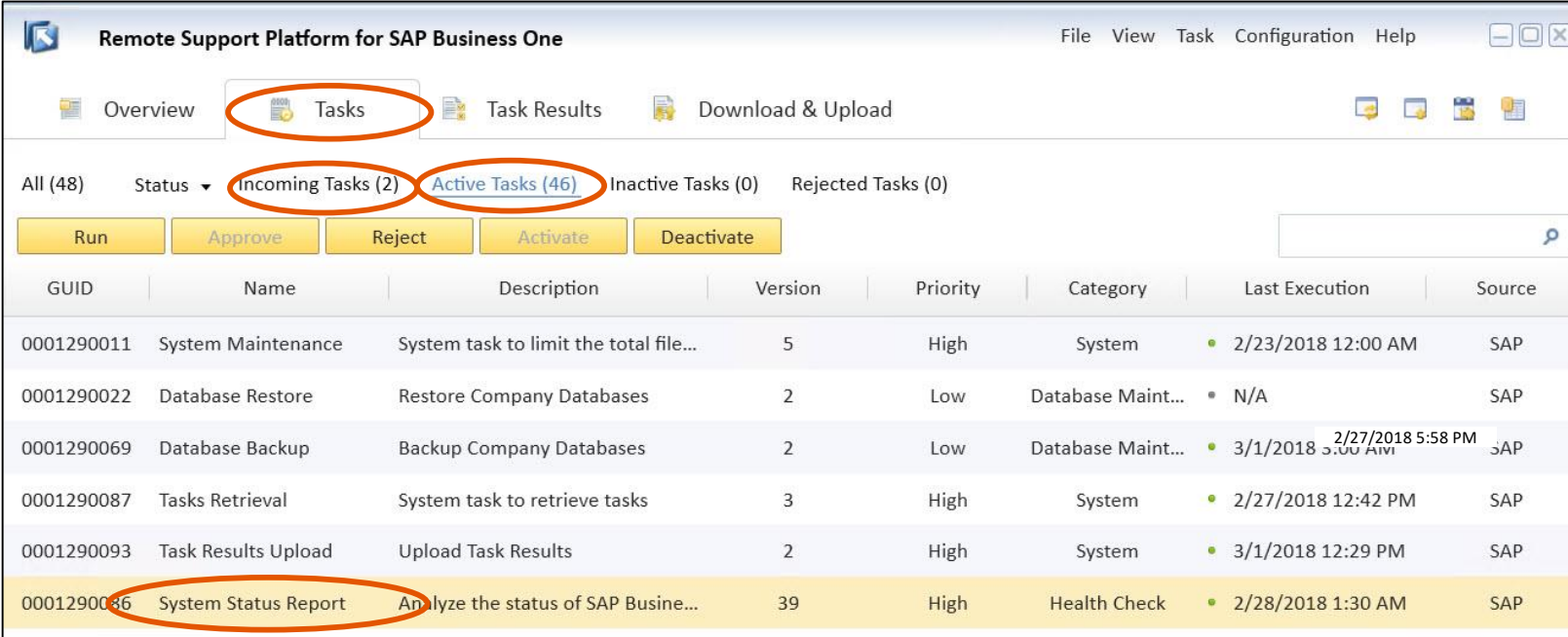
SAP Note [1776656](#) (Apache)

The screenshot displays the 'Remote Support Platform for SAP Business One' interface. The 'Configuration' menu is highlighted in the top right. The 'Configuration' dialog box is open, showing the 'Partner Channel' tab. The 'Enable Partner Channel' checkbox is checked. Below it, the 'WebDAV Server URL' is set to 'http://localhost:9090', the 'User Name' is 'WebDAV', and the 'Password' is masked with dots. A 'Test Connection' button is visible. In the 'Approvals' section, 'New Task', 'Task Updating', and 'Task Result' are all set to 'Approve Automatically', 'Execute Immediately' is 'Enabled', and the 'Refresh Interval' is '2' minutes. The background shows the 'System Status' section with various system components and a table of connections.

Name	Last Connected
Database Connecti	3/1/2018 1:52 PM
SAP Connection	3/1/2018 1:07 PM
E-Mail Connection	3/1/2018 1:53 PM
Partner WebDAV C	3/1/2018 1:07 PM

Initializing the System - Tasks

- First 6 fundamental RSP tasks are active.
- System Status Report:** This report has to be uploaded to SAP at least once, in order to register this specific RSP installation at SAP and at the Partner's RSP Studio.
- Best Practice:** Schedule the system status report to run at least once a week and ensure that the results are uploaded shortly after execution. This way, you will avoid unnecessary questions from Support.
See [SAP Note 1604172](#)
- Best Practice:** Status „Incoming Tasks “ should always show zero tasks (0). Therewith all tasks are under the tab „Active Tasks“.



Remote Support Platform for SAP Business One

File View Task Configuration Help

Overview **Tasks** Task Results Download & Upload

All (48) Status Incoming Tasks (2) **Active Tasks (46)** Inactive Tasks (0) Rejected Tasks (0)

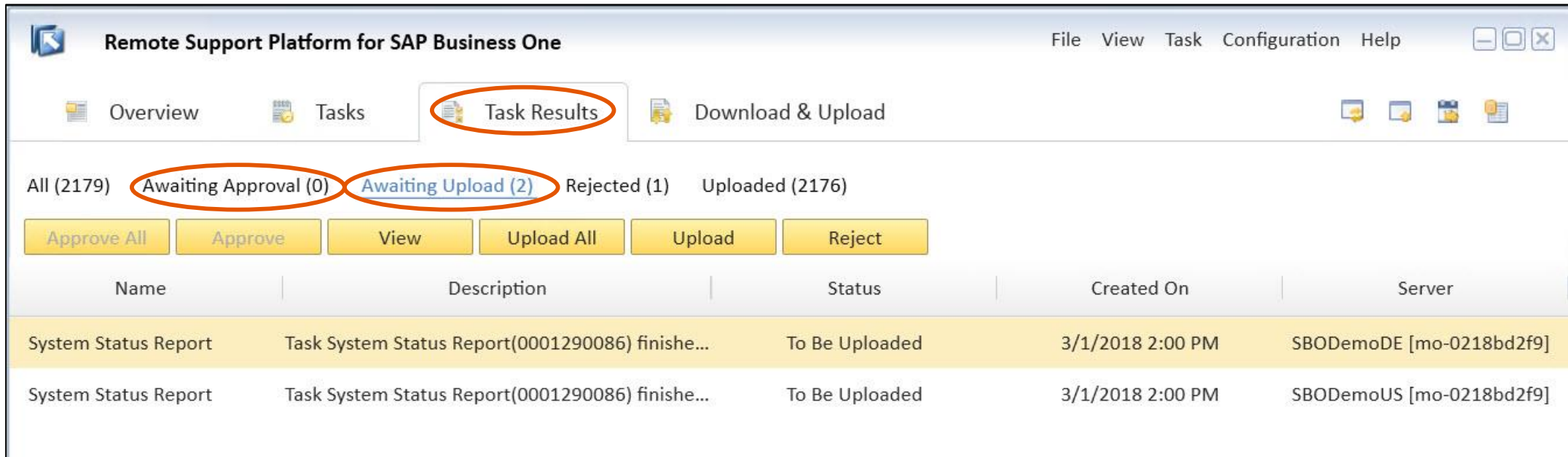
Run Approve Reject Activate Deactivate

GUID	Name	Description	Version	Priority	Category	Last Execution	Source
0001290011	System Maintenance	System task to limit the total file...	5	High	System	2/23/2018 12:00 AM	SAP
0001290022	Database Restore	Restore Company Databases	2	Low	Database Maint...	N/A	SAP
0001290069	Database Backup	Backup Company Databases	2	Low	Database Maint...	3/1/2018 5:58 PM	SAP
0001290087	Tasks Retrieval	System task to retrieve tasks	3	High	System	2/27/2018 12:42 PM	SAP
0001290093	Task Results Upload	Upload Task Results	2	High	System	3/1/2018 12:29 PM	SAP
0001290086	System Status Report	Analyze the status of SAP Busine...	39	High	Health Check	2/28/2018 1:30 AM	SAP

Initializing the System – Task Results

Best Practices:

- “Awaiting Approval” should show zero tasks (0).
To reach that, approve all results so that results are approved for upload.
- “Awaiting Upload” can be set to zero (0) by pressing the “upload all” or the “upload” button.



The screenshot displays the 'Remote Support Platform for SAP Business One' interface. The 'Task Results' tab is selected and circled in red. Below the tabs, the status summary shows 'All (2179)', 'Awaiting Approval (0)' (circled in red), 'Awaiting Upload (2)' (circled in red), 'Rejected (1)', and 'Uploaded (2176)'. A row of buttons includes 'Approve All', 'Approve', 'View', 'Upload All', 'Upload', and 'Reject'. Below these buttons is a table with the following columns: Name, Description, Status, Created On, and Server.

Name	Description	Status	Created On	Server
System Status Report	Task System Status Report(0001290086) finishe...	To Be Uploaded	3/1/2018 2:00 PM	SBODemoDE [mo-0218bd2f9]
System Status Report	Task System Status Report(0001290086) finishe...	To Be Uploaded	3/1/2018 2:00 PM	SBODemoUS [mo-0218bd2f9]

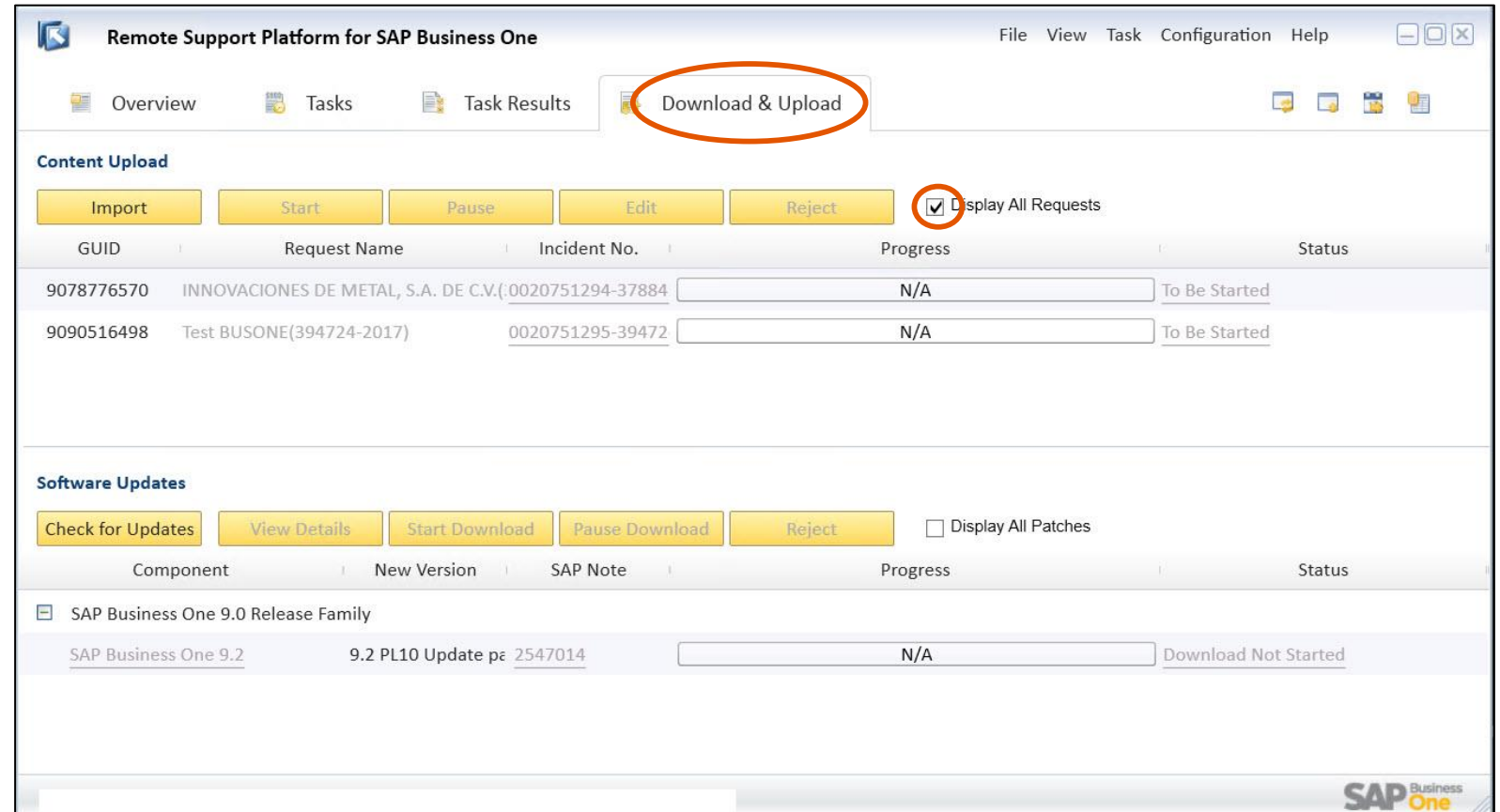
Initializing the System - Download & Upload

- **Upload Database:**

As of RSP 3.2 PL08, a simplified upload request in RSP is supported, which allows an easy database upload for both MSSQL and SAP HANA.

See [SAP Note 2448164](#)

- Partners who use the RSP Studio can request a Database Upload from their customers directly from their RSP Studio.
- Via “Display All Requests” all executed Uploads can be displayed.



Initializing the System – Book GoToAssist and Remote Services

Remote Connection

- With RSP 3.2, a new Remote Connection service is available for all SAP Business One customers
- [Watch this video on Remote Connection](#) to learn how to set up the remote connection and then book and open or close selected remote services
- See the [Administrator's Guide to the SAP Remote Connection for SAP Business One](#)

GoToAssist Booking Service

- Since April 1st, 2017, GoToAssist replaced WebEx as remote meeting tool
- [Watch how easy it is to book a GoToAssist service in RSP](#) in advance for all of your customers (for Partners only)
- See [SAP Note 2453996](#)

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Customizing - Partner Test Environment

In order to upload a database from the partner test environment to SAP, the partner test environment should be configured as described in [SAP Note 2448164](#)

The screenshot shows the SAP Configuration window with the 'Databases' tab selected. The 'Company Database Details' dialog is open, showing the configuration for a specific database.

Configuration Window - Databases Tab

Company Name	Database Name	Version	Type	System No.	Installation No.
SAP Business One MSSQL Server: WDFV33950193D\SQLEXPRESS (Online)					
SBO-COMMON					
<input checked="" type="checkbox"/>	OEC Comput...	SBODemoDE	930100	Testing	Default
<input checked="" type="checkbox"/>	OEC Comput...	SBODemoUS	930100	Testing	Default

Company Database Details Dialog

Company Name: OEC Computers Deutschland

Database Name: SBODemoDE

Version: 930100

Type: Testing

☒ Use Specific System Identification

System Number: **System number Customer** *

Installation Number: **Installation number Customer** *

Backup Path: C:\Program Files\Microsoft SQL Server\MSSQL13.SQLEXPRESS Browse...

Buttons: OK, Cancel, Save

Customizing Automation at Customer Side

The RSP Customer installation can be configured in such a way, that health checks (read-only queries) that are created by the partner in the RSP Studio can automatically

- Be transferred to the RSP customer installation
- Be executed there, and
- Results sent back to the partner's RSP Studio

Best Practices:

Set approvals to “Approve Automatically”

Best Practices:

By activating the setting “Execute Immediately” the tasks will be executed automatically and no manual interaction is needed.

The screenshot shows the 'Configuration' window with the 'Partner Channel' tab selected. The left sidebar lists various configuration areas: General, Accounts, Databases, Channels (selected), Content Upload, Software Updates, and Backups. The main area contains the following settings:

- Enable Partner Channel:** A checkbox that is checked.
- Choose the channel if you want to connect to your partner's server to retrieve tasks and send results to.**
- WebDAV Server URL:** A text field containing 'http://' followed by a masked domain.
- User Name:** A text field containing 'WebDAV'.
- Password:** A text field with masked characters (dots).
- Test Connection:** A yellow button.
- Approvals:** A section with several dropdown menus:
 - New Task:** Set to 'Approve Automatically'.
 - Task Updating:** Set to 'Approve Automatically'.
 - Task Result:** Set to 'Approve Automatically'.
 - Execute Immediately:** Set to 'Enabled'.
 - Refresh Interval:** A spinner set to '2' with a unit of '[1 - 60] Minute(s)'.
- Save:** A yellow button at the bottom right.

Customizing - Reporting

The Task Results that are transferred from the customer RSP installation to the Partner's RSP Studio will be saved automatically within **SQL Database „RSPSrv“**

This data can be displayed in graphical form under
RSP Studio → Configuration → Reporting (for Partners only)

RSP Reporting System							
Overview Installed Base Results List Fixing List							
<u>Customer Status</u>							
Customer	DB Name	B1 Version	S/W Status	DB Status	HW/OS Status	RSP Status	Report Date
Chile	Chile	882072	Excellent	Acceptable	Poor	Poor	...
Chile	SBODemoDE	882072	Excellent	Acceptable	Poor	Poor	...
Chile	SBODemoUS	882072	Excellent	Acceptable	Poor	Poor	...
Chile	KP_DE	882072	Excellent	Acceptable	Poor	Poor	...
Chile	SBODemoCN	882072	Excellent	Acceptable	Poor	Poor	...
Chile	KP_CN	882072	Excellent	Acceptable	Poor	Poor	...
Chile	PG_India	882072	Excellent	Acceptable	Poor	Poor	...
OEC Computers SK	SBODemoSK	882072	Excellent	Acceptable	Poor	Poor	...
OEC Computers SK	SBODemoDE	882072	Excellent	Acceptable	Poor	Poor	...
OEC Computers SK	SBODemoGB	882072	Excellent	Acceptable	Poor	Poor	...

<u>Top 10 Issues in Installed Base</u>			<u>Recent 10 reports delivered</u>		
Issue Title	SAP Note	Affected	Customer Name	Task Name	Report Date
			OEC Computers SK	System Status R	21/05/2018 08:55 AM

Customizing - Important SAP Notes

SAP Notes related to security of RSP for SAP Business One and authorizations issues:

- [1166732](#): Data Secrecy / Confidentiality Statement
- [1882682](#): S-user authorizations for RSP installations
- [2063077](#): How to Request a Technical User and an S-user for Configuring RSP

SAP Notes related to RSP:

- [1788954](#): Usage and most relevant tasks of the Remote Support Platform for SAP Business One
- [2448164](#): Simplified Content Upload Request in RSP
- [1579400](#): How to upload a database to SAP using remote support platform for SAP Business One
- [1776879](#): Customized Solution via Remote Support Platform for SAP Business One
- [1880842](#): RSP: Required ports for TCP/IP communication
- [2353878](#): Technical Consistency Checks and data protection for SAP HANA Databases
- [1969700](#): SQL Statement Collection for SAP HANA (SAP HANA Health Check)

SAP Notes related to RSP Studio:

- [1593180](#): Remote Approval and Scheduling of RSP tasks
- [1697750](#): WebDAV configuration using IIS
- [1776656](#): WebDAV configuration using Apache

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