

COSMO PROFESSIONAL SERVICES PACK

Online Help PDF

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COSMO Project Manufacturing Pack

COSMO Project Manufacturing Pack is a solution tailored to the industry-specific requirements of the segments plant engineering and special mechanical engineering. It offers project calculation and processing capabilities as well as integration to manufacturing.

The COSMO Project Manufacturing Pack app is a collection of COSMO CONSULT apps that extend the COSMO Project Manufacturing app with industry-specific or crossfunctional apps to better meet the needs of the industry. The apps included in the COSMO Project Manufacturing Pack are listed in the tables below, along with the existing integrations between apps. Apart from these integrations, the COSMO Project Manufacturing Pack app provides no additional integration or functionality; therefore, this content is only intended to provide an overview of the apps as well as installation and registration information.

The COSMO Project Manufacturing Pack app includes all apps from COSMO Advanced Manufacturing Pack.

COSMO Calculation	COSMO Discrete	COSMO Process
COSMO Calculation	Manufacturing	Manufacturing
COSMO Project	COSMO Purchase Quotes	Project Manufacturing
Manufacturing	<u>Manager</u>	<u>Integrations</u>

The COSMO Project Manufacturing Pack app includes all apps from COSMO Advanced Manufacturing Suite but only uses the apps listed below.



The additional COSMO CONSULT apps included in the COSMO Project Manufacturing Pack app are listed below.

COSMO Digital	COSMO	COSMO Advance Payment (DACH
Consultant	Workflow	only)





The apps included in the COSMO Project Manufacturing Pack are subject to change without notice and may not be reflected in this content.

Feedback



Getting Started

Due to the various apps in the COSMO Project Manufacturing Pack, additional steps are needed to complete the installation and registration of the apps. These steps must be completed in the order described below to ensure proper installation, registration, and licensing.

Note

COSMO Advance Payment is only available in German-speaking countries (DACH) and is not included in the COSMO Project Manufacturing Pack installation and registration processes. However, it is available with the COSMO Project Manufacturing Pack license and can be installed and registered manually.

The following table describes a sequence of tasks, with links to the topics that describe them.

То	See
Install the COSMO Project Manufacturing Pack app.	App Installation
Set the user permissions needed to access the COSMO Digital Consultant app.	<u>User Permissions</u>
License and register the COSMO Project Manufacturing Pack	App Licensing and
apps using the COSMO Licensing app.	Registration
Activate the COSMO Project Manufacturing Pack apps as needed through the various setup pages.	App Activation
Initialize the COSMO Digital Consultant app.	Initialize Digital
	Consultant App
Install and register the COSMO Advance Payment app (DACH	<u>Install Advance</u>
only).	Payment App

Feedback



App Installation

This section covers the installation of the COSMO Project Manufacturing Pack app.

Typically an installation is only performed once by an administrator and is not executed by the user. The installation differs for SaaS and On-Premises (OnPrem) environments.

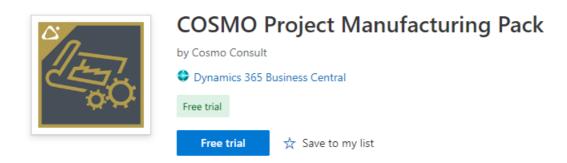
To install in SaaS environment

In SaaS environments, the app can be installed from the <u>AppSource</u>. There are two ways to install the app: <u>externally</u> or <u>internally</u> from Business Central. All dependencies are installed automatically.

Depending on the current Microsoft upgrade policy, you may not have the most current version of the app. To upgrade to the most current version, go to the Dynamics 365 Business Central admin center and perform the app upgrade for your environment.

AppSource

Visit the <u>AppSource</u> and then choose <u>Free trial</u>. You will be forwarded to a page where you must log in with your Business Central user credentials and select an environment to install the app to. Follow the wizard instructions to complete the installation.



Extension Marketplace

In Business Central, choose the icon, enter Extension Marketplace, and then choose the related link. In the marketplace, search for COSMO Project Manufacturing Pack and then choose Free Trial. Follow the wizard instructions to complete the installation.





To install in on-premises environment

To install the COSMO Project Manufacturing Pack app and its requirements in an onpremises environment, you can find the app files in the COSMO CONSULT Solution Portal. Check the technical specifications of each version to find the minimum dependent version of *Business Central* and the *Base Application*. For customer installations without a Business Central developer license, you must create and install a runtime package of the app (Microsoft Documentation).

Besides the Business Central Base Application, the app depends on additional apps that must be installed in the correct order first.

- 1. COSMO Licensing app
- 2. COSMO Graphical Extension app
- 3. COSMO Advanced Manufacturing Pack app
- 4. COSMO Template Catalog app
- 5. COSMO Document Management System app
- 6. COSMO Text Module app
- 7. COSMO Quality Assurance app
- 8. COSMO Vendor Rating app
- 9. COSMO Product Data Management app
- 10. COSMO Regulatory Affairs app
- 11. COSMO Advanced Manufacturing Suite app
- 12. COSMO Digital Consultant app
- 13. COSMO Workflow app



14. COSMO Project Manufacturing Pack app

See Also

User Permissions

App Licensing and Registration

App Activation

Initialize Digital Consultant App

Feedback



User Permissions

Before initializing the COSMO Digital Consultant app, you must set up permissions for users/user groups.

- 1. Choose the licon, enter User Groups, and then choose the related link.
- 2. Choose the New action to add a user group.
- 3. In the Code field, enter the unique identifier for the user group, e.g., DCO USER.
- 4. In the Name field, enter a short description for the user group, e.g., Digital Consultant.
- 5. Choose the Permissions action to assign the Digital Consultant permissions to the new user group.
- 6. In the Permission Set field, enter CCS DCO PERMISSIONS.
- 7. Go back to the User Groups page.
- 8. With the line for the new Digital Consultant user group selected, choose the Members action.
- 9. On the Home menu, choose the Add Users action and then choose all users that are allowed to access the COSMO Digital Consultant app.

See Also

Initialize Digital Consultant App

Feedback



App Licensing and Registration

This section covers the licensing, registration, and license check of the COSMO Project Manufacturing Pack app. When installing the app, the following apps are automatically installed:

- COSMO Advanced Manufacturing Pack
- COSMO Digital Consultant
- COSMO Document Management System
- COSMO Graphical Extension
- COSMO Product Data Management
- COSMO Quality Assurance
- COSMO Regulatory Affairs
- COSMO Text Module (Base and Rich Text Editor)
- COSMO Vendor Rating
- COSMO Workflow
- COSMO Licensing

After installation, you need to register all apps either with a license activation code or a trial license.

Note

App registration by activation code is available if COSMO Licensing version 2.2 or higher is installed. Customers who purchase new COSMO product subscriptions through our Marketplace will receive an activation code.

If you do not have the option to enter an activation code or have not received an activation code, follow the steps in the <u>Register the app with a trial license</u> section.

After you have registered, you can contact <u>appsource@cosmoconsult.com</u> to convert your 30-day trial license to a full license.

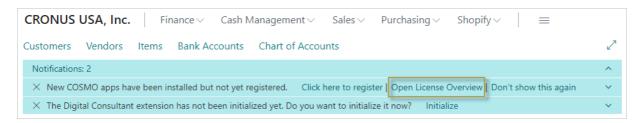
To assign licensing permission set

The COSMO Licensing app provides an extension permission set with Role ID = CCS LIC ALL. This permission set must be assigned to all users in the database to allow access to the COSMO License Overview page and, more importantly, to the licensed COSMO CONSULT apps. App-specific permission set(s) must be assigned to users in the database to allow access to the licensed functionality.

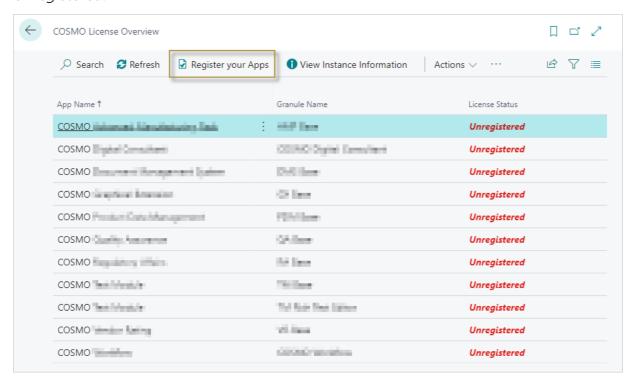


To open the COSMO License Overview

1. If the registration notification does not show in the notification bar, refresh the environment.



On the notification line, choose Open License Overview.
 The apps are listed in the COSMO License Overview page with Status = Unregistered.



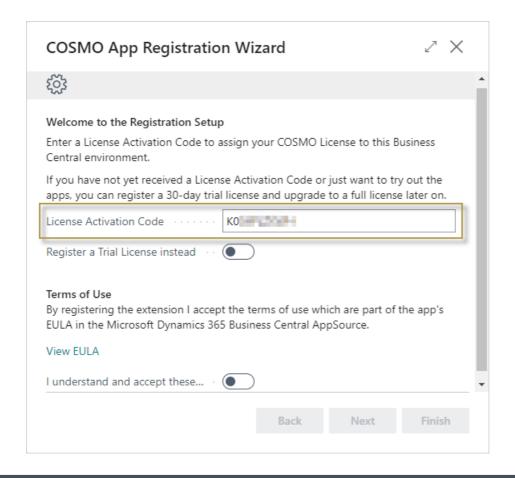
Choose the Register your Apps action.
 The COSMO App Registration Wizard opens with the registration options.

To register the app with license activation code

1. If you purchased the Business Central app through our Marketplace, you will have received an activation code by email.

Enter this activation code in the License Activation Code field on the first page of the COSMO App Registration Wizard.



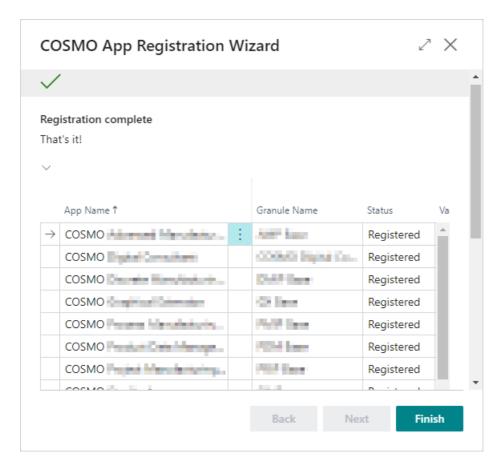


■ Note

In SaaS environments, an activation code can be used for exactly one production system. The same activation code can additionally be used in multiple SaaS environments (sandbox environments, e.g., test/demo/development environments). For On-premises, there is no technical distinction between *Production* and *Sandbox*, so the activation code is instead connected to the serial number of the Business Central license (.flf / .bclicense) with which it was first activated. Therefore, it is possible to use it On-premises multiple times with the same Business Central license (to allow use in test/demo/development environments). Once it has been redeemed, it cannot be used in BC environments with another BC license.

- 2. In order to agree to the Terms of Use, scroll down, turn on the I understand and accept these terms toggle, and then choose the Next button.
- 3. You have successfully registered your apps. Choose the Finish button to close the wizard.
 - All licenses connected to the entered activation code will then be automatically retrieved.

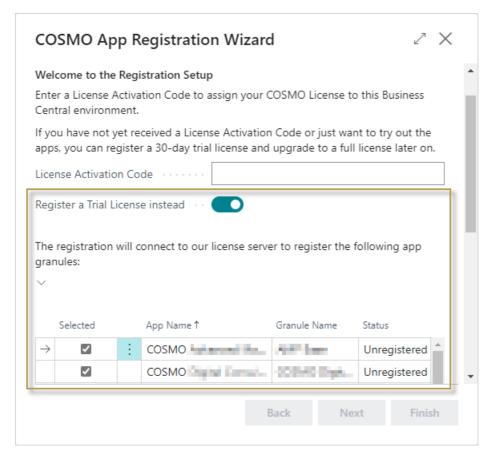




To register the app with a trial license

 If you turn on the Register a Trial License instead toggle on the first page of the COSMO App Registration Wizard, the app granules to be registered are displayed.





- Clear the Selected checkbox for any of the apps that you do not want to register. For example, the following apps are not licensed for COSMO Project Manufacturing Pack and could be excluded:
 - COSMO Document Management System
 - COSMO Quality Assurance
 - COSMO Regulatory Affairs
 - COSMO Vendor Rating
- 3. In order to agree to the Terms of Use, scroll down, turn on the I understand and accept these terms toggle, and then choose the Next button.
- 4. Enter your customer name. The name is used to identify the company. For test purposes, enter any Cronus-related name.
- 5. Choose the Next button to sign into the COSMO Platform to link the registration with your account. The COSMO Platform opens in a new browser tab. After signing in you can close this tab and return to the final page of the COSMO App Registration Wizard.

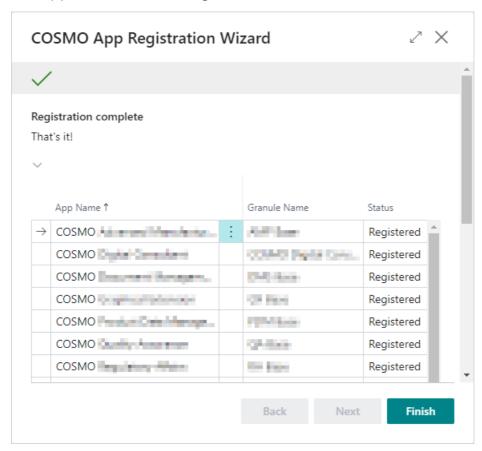
To skip this step, choose the Skip Login button.

6. You have successfully registered for a 30-day trial version of the app. Contact appsource@cosmoconsult.com and use the displayed license keys to update your trial



subscription.

7. The apps have Status = Registered. Choose the Finish button to close the wizard.



8. The status for each app is updated in the COSMO License Overview page. Leave the COSMO License Overview page to return to the Role Center.



You can register the apps and perform other administrative licensing tasks from the COSMO License Overview page.

To check the licenses

The COSMO License Overview page lists the license status of the COSMO apps and is accessed using the Tell Me feature.

Choose the ☐ icon, enter COSMO License Overview, and then choose the related link.
 This page can also be opened from the AMP Setup, PDM Setup, Setup - Text
 Module, and Workflow Setup pages and on (Actions > App Licensing or Related
 > App Licensing) and from the last page of the COSMO App Registration Wizard
 by choosing Open License Overview.



- 2. In the COSMO License Overview page, the apps can be registered if not done on the Role Center notification bar. Other administrative tools are available as well.
- 3. Hover over an action on the COSMO License Overview page to read a short description.

Trial license vs paid license

Due to the nature of this pack, all apps within the Advanced Manufacturing Pack and Advanced Manufacturing Suite are included with the trial license. Once the trial period ends, only the apps in the paid license will be available. The list of licensed apps is available on the overview page. For questions about licensing, contact appsource@cosmoconsult.com and reference the license keys.

See Also

App Installation

User Permissions

App Activation

Initialize Digital Consultant App

Feedback



App Activation

Products in COSMO Project Manufacturing Pack have an activation toggle in the respective setup pages which makes pages and controls visible for the products. The setting in this field, in combination with the settings in the Product Configuration Management tool, control the Application Areas in standard Microsoft Dynamics 365 Business Central.



Turning on the toggle in the setup pages will require logged in users to restart the application.

For more information, see Product Configuration Management Tool.

! Important

For COSMO Discrete Manufacturing and COSMO Process Manufacturing, the Experience field must first be set to *Premium* in the Company Information page before you can access the respective setup pages.

To activate COSMO Calculation

- 1. Choose the licon, enter Calculation Setup, and then choose the related link.
- 2. On the General FastTab, turn on the Activate Appl. Area toggle.
- 3. Close the page or continue with further setup (see <u>Calculation Setup</u>).

To activate COSMO Discrete Manufacturing

- 1. Choose the licon, and then choose Company information.
- 2. Expand the User Experience FastTab.
- 3. In the Experience field, choose the ellipsis button, select *Premium*, and then choose the OK button.
- 4. Choose the licon, enter Configure to Order Setup, and then choose the related link.
- 5. On the General FastTab, turn on the Activate Appl. Area toggle.
- 6. Close the page or continue with further setup (see Configure to Order Setup).

To activate COSMO Graphical Extension



- 1. Choose the licon, enter Graphical Extension Setup, and then choose the related link.
- 2. On the General FastTab, turn on the Enable Application Area toggle.
- 3. Close the page or continue with further setup (see Graphical Extension Setup).

To activate COSMO Process Manufacturing

COSMO Process Manufacturing has two application areas to activate: Process Manufacturing and Planning Extension.

- 1. Choose the licon, and then choose Company information.
- 2. Expand the User Experience FastTab.
- 3. In the Experience field, choose the ellipsis button, select *Premium*, and then choose the OK button.
- 4. Choose the licon, enter Process Manufacturing Setup, and then choose the related link.
- 5. On the General FastTab, turn on the Activate Appl. Area toggle to activate the base functionality in COSMO Process Manufacturing.
- 6. Close the page or continue with further setup (see Process Manufacturing Setup).
- 7. Choose the licon, enter Planning Extension Setup, and then choose the related link.
- 8. On the General FastTab, turn on the Activate Appl. Area toggle to activate the planning functionality in COSMO Process Manufacturing.
- 9. Close the page or continue with further setup (see <u>Planning Extension Setup</u>).

To activate COSMO Product Data Management

- 1. Choose the licon, enter PDM Setup, and then choose the related link.
- 2. On the General FastTab, turn on the Activate Appl. Area toggle.
- 3. Close the page or continue with further setup (see PDM Setup).

To activate COSMO Project Manufacturing

- 1. Choose the licon, enter COSMO Project Setup, and then choose the related link.
- 2. On the General FastTab, turn on the Activate Appl. Area toggle.
- 3. Close the page or continue with further setup (see <u>Jobs Setup</u>).

To activate COSMO Purchase Quotes Manager

1. Choose the **Q** icon, enter **PQM** Setup, and then choose the related link.



- 2. On the General FastTab, turn on the Activate Appl. Area toggle.
- 3. Close the page or continue with further setup (see <u>PQM Setup</u>).

To activate COSMO Workflow

- 1. Choose the licon, enter Workflow Setup, and then choose the related link.
- 2. On the General FastTab, turn on the Activate Appl. Area toggle.
- 3. Close the page or continue with further setup (see Workflow Setup).

See Also

App Installation
App Licensing and Registration

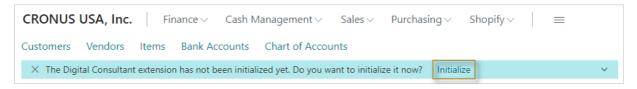
Feedback



Initialize Digital Consultant App

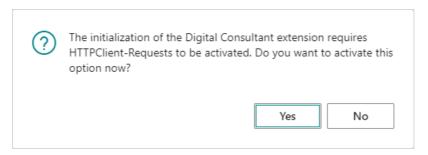
To download data from the COSMO CONSULT backend system using web services, HTTP client requests must be activated.

1. If the initialization notification is not shown in the notification bar, refresh the environment.



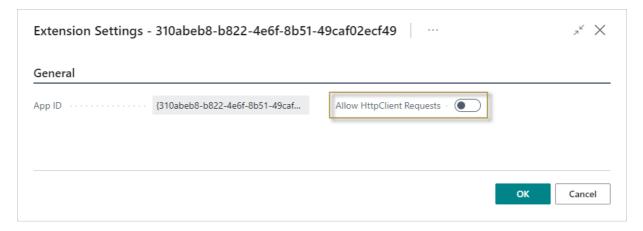
2. On the notification line, choose Initialize.

A message opens stating that initialization of the Digital Consultant extension requires activation of the HTTPClient-Requests.



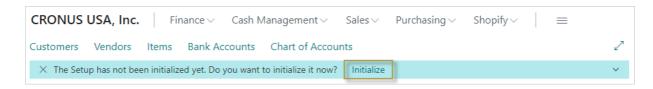
3. Choose the Yes button to active the option.

The Extension Settings page opens.



- 4. Turn on the Allow HttpClient Requests toggle.
- 5. Choose the OK button.
- 6. If the next initialization notification for Setup is not shown in the notification bar, refresh the environment.





- 7. On the notification line, choose Initialize.
- 8. Choose the OK button to close the confirmation message stating that the Digital Consultant has been successfully initialized.

After initializing the COSMO Digital Consultant app, you can continue with the steps for setting up the Digital Consultant environment.

То	See
Create team members from existing BC users.	<u>Create Team Member</u>
Set and manage teams.	Team Setup and Management
Use the content catalog to download a digital solution.	<u>Store</u>

See Also

User Permissions

Digital Consultant content for features, marketing, and support

Feedback



Install Advance Payment App (DACH only)

The COSMO Advance Payment app is only available in German-speaking countries (DACH) and therefore is not included in the COSMO Project Manufacturing Pack by default. However, it is included in the license and can be installed and registered manually to be used with COSMO Project Manufacturing Pack. Additionally, there are no special integrations between the COSMO Advance Payment app and the apps in the COSMO Project Manufacturing Pack.

The following table describes a sequence of tasks, with links to the topics that describe them.

То	See
Install the COSMO Advance Payment app.	App Installation
License, register, and activate the COSMO Advance Payment app	App Licensing and
using the COSMO Licensing app.	Registration

See Also

<u>Advance Payment Documentation</u>

Feedback



App Installation

This section covers the installation of the COSMO Advance Payment app. Typically an installation is only performed once by an administrator and is not executed by the user. The installation differs for SaaS and On-Premises (OnPrem) environments.

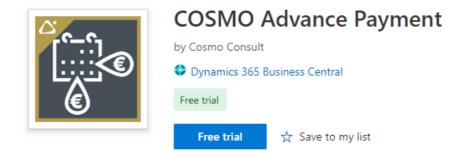
To install in SaaS environment

In SaaS environments, the app can be installed from the <u>AppSource</u>. There are two ways to install the app: <u>externally</u> or <u>internally</u> from Business Central. All dependencies are installed automatically.

Depending on the current Microsoft upgrade policy, you may not have the most current version of the app. To upgrade to the most current version, go to the Dynamics 365 Business Central admin center and perform the app upgrade for your environment.

AppSource

Visit the <u>AppSource</u> and then choose <u>Free trial</u>. You will be forwarded to a page where you must log in with your Business Central user credentials and select an environment to install the app to. Follow the wizard instructions to complete the installation.



Extension Marketplace

In Business Central, choose the icon, enter Extension Marketplace, and then choose the related link. In the marketplace, search for COSMO Advance Payment and then choose Free Trial. Follow the wizard instructions to complete the installation.



AppSource

Apps for Business Central

< Apps



COSMO Advance Payment * Save to my list

Cosmo Consult

★★★★★ (0) Write a review

Free trial

Overview

Ratings + reviews

Free Trial

Products
Dynamics 365 Business Central

Auf Basis von Microsoft Dynamics 365 Business Central

This application is available only in Germany, Austria and Switzerland.

To install in on-premises environment

To install the COSMO Advance Payment app and its requirements in an on-premises environment, you can find the app files in the COSMO CONSULT Solution Portal. Check the technical specifications of each version to find the minimum dependent version of *Business Central* and the *Base Application*. For customer installations without a Business Central developer license, you must create and install a runtime package of the app (Microsoft Documentation).

The other COSMO Project Manufacturing Pack apps were already installed; therefore, you only need to install the COSMO Advance Payment app in your on-premises environment.

See Also

App Licensing and Registration

Advance Payment Documentation

Feedback



App Licensing and Registration

This section covers the licensing, registration, license check, and activation of the COSMO Advance Payment app. After installing the app, you need to register it either with a license activation code or a trial license.



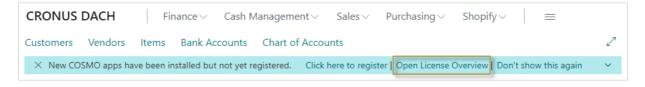
App registration by activation code is available if COSMO Licensing version 2.2 or higher is installed. Customers who purchase new COSMO product subscriptions through our Marketplace will receive an activation code.

If you do not have the option to enter an activation code or have not received an activation code, follow the steps in the <u>Register the app with a trial license</u> section.

After you have registered, you can contact <u>appsource@cosmoconsult.com</u> to convert your 30-day trial license to a full license.

To open the COSMO License Overview

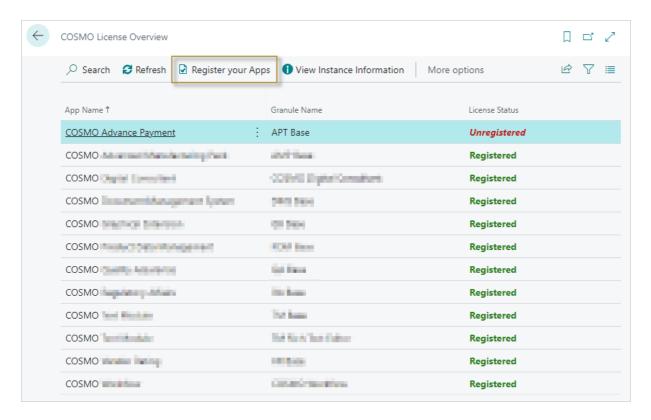
1. If the registration notification does not show in the notification bar, refresh the environment.



2. On the notification line, choose Open License Overview.

The app is listed in the COSMO License Overview page with Status = Unregistered.





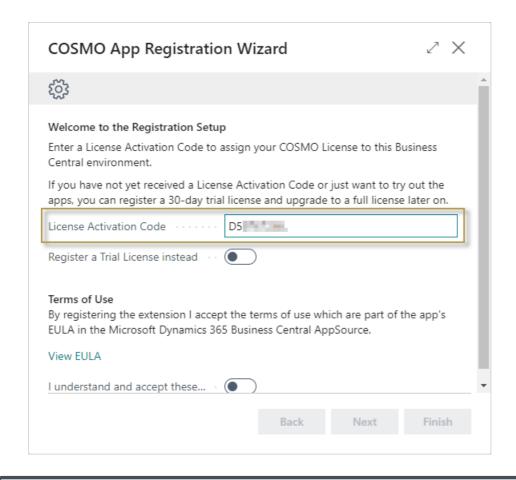
Choose the Register your Apps action.
 The COSMO App Registration Wizard opens with the registration options.

To register the app with license activation code

1. If you purchased the Business Central app through our Marketplace, you will have received an activation code by email.

Enter this activation code in the License Activation Code field on the first page of the COSMO App Registration Wizard.



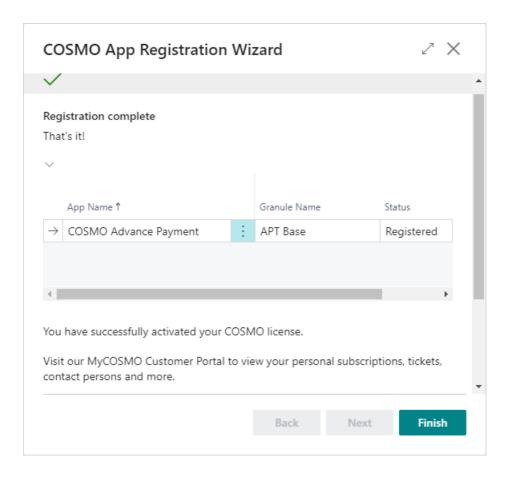


■ Note

In SaaS environments, an activation code can be used for exactly one production system. The same activation code can additionally be used in multiple SaaS environments (sandbox environments, e.g., test/demo/development environments). For On-premises, there is no technical distinction between *Production* and *Sandbox*, so the activation code is instead connected to the serial number of the Business Central license (.flf / .bclicense) with which it was first activated. Therefore, it is possible to use it On-premises multiple times with the same Business Central license (to allow use in test/demo/development environments). Once it has been redeemed, it cannot be used in BC environments with another BC license.

- 2. In order to agree to the Terms of Use, scroll down, turn on the I understand and accept these terms toggle, and then choose the Next button.
- 3. You have successfully registered your app. Choose the Finish button to close the wizard.
 - The license connected to the entered activation code will then be automatically retrieved.

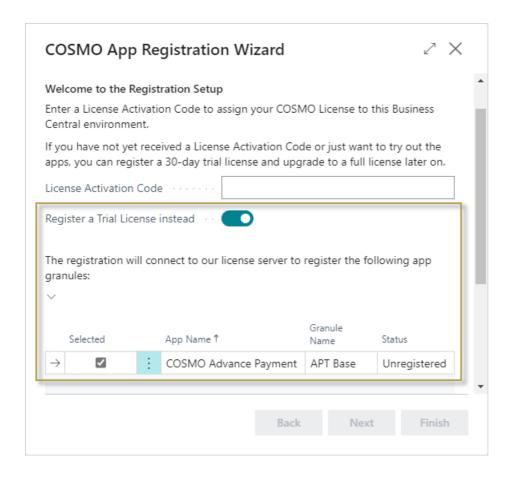




To register the app with a trial license

1. If you turn on the Register a Trial License instead toggle on the first page of the COSMO App Registration Wizard, the app granule to be registered is displayed.



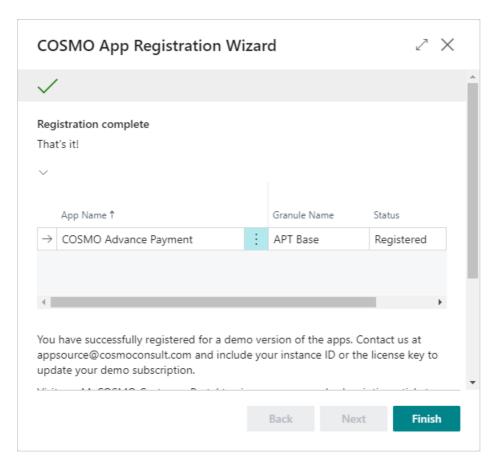


- 2. In order to agree to the Terms of Use, scroll down, turn on the I understand and accept these terms toggle, and then choose the Next button.
- 3. Enter your customer name. The name is used to identify the company. For test purposes, enter any Cronus-related name.
- 4. Choose the Next button to sign into the COSMO Platform to link the registration with your account. The COSMO Platform opens in a new browser tab. After signing in you can close this tab and return to the final page of the COSMO App Registration Wizard.

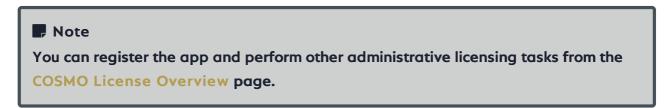
To skip this step, choose the Skip Login button.

- 5. You have successfully registered for a 30-day trial version of the app. Contact appsource@cosmoconsult.com and use the displayed license key to update your trial subscription.
- 6. The app has Status = Registered. Choose the Finish button to close the wizard.





7. The status for the app is updated in the COSMO License Overview page. Leave the COSMO License Overview page to return to the Role Center.



To check the license

The COSMO License Overview page lists the license status of the COSMO app and is accessed using the Tell Me feature.

- Choose the licon, enter COSMO License Overview, and then choose the related link.
 This page can also be opened from the Advance Payment Setup page (Actions > App Licensing) and from the last page of the COSMO App Registration Wizard by choosing Open License Overview.
- 2. In the COSMO License Overview page, the app can be registered if not done on the Role Center notification bar. Other administrative tools are available as well.
- 3. Hover over an action on the COSMO License Overview page to read a short



description.

To activate COSMO Advance Payment

After installation and registration, you must activate COSMO Advance Payment in the application.

- 1. Choose the licon, enter Advance Payment Setup, and then choose the related link.
- 2. On the General FastTab, turn on the Enable Application Area toggle.
- 3. Close the page or continue with further setup (see Advance Payment Setup).
- 4. Assert that all other users log in again.

See Also

App Installation

Advance Payment Documentation

Feedback

