This course explores the options available in the new role-based cockpit available for SAP Business One on HANA.
At the end of this topic, you will be able to:
- List the advantages of the new role-based cockpit
- Assign a role-based cockpit to a user
- Use the functions in the cockpit
- Personalize the cockpit for a user
- Customize the count widget
SAP Business One release 9.1, provides role-based cockpits predefined for finance, inventory, purchasing, and sales. Selected analytics widgets designed for each role are included in each cockpit. These analytics provide valuable information for a user’s daily operations and decision-making. Additional widgets can be added from a widget gallery with all the available variations. The HTML5 interface, which uses SAP’s Fiori concept, is available for personal computers, tablets and mobile devices.

The role-based cockpits are automatically assigned to users based on the user’s permission group. Since the cockpit is designed for a user’s role, it becomes even easier to train new users on the functions that are common to their role. This results in an enhanced user where essential analytics and daily functions are organized in an immediate and visualized way.
The Warehouse Manager of OEC Computers needs a cockpit that gives his team a quick overview of their warehouse stock, key performance indicators for inventory values and turnover, and a way to track transfer requests.

There is a high turnover in the warehouse staff, so he needs a cockpit that makes training new team members easier.

Each user needs their most frequently used functions in one place so that they can focus on their responsibility with the necessary information to their jobs.

The new role based cockpit provides these options.
The new role-based cockpit is automatically activated as the default cockpit for SAP Business One 9.1, version for SAP HANA.

When you use this cockpit, the user interface of SAP Business One is changed to a new look and feel, different from the traditional look.

You have the option of using the new role-based cockpit and its Fiori-style user interface or returning to the more traditional style. This setting is found on the Cockpit tab of the General Settings window. Any change takes place at the next logon.

When the new cockpit is chosen, it is automatically enabled at the user level. Please note that unlike the traditional cockpit, a user does not have the option to disable the Fiori-style cockpit. If a user does not wish to use cockpit functions, they can clear the desktop by closing all the widgets.
Once a user has activated their cockpit, they will see the Fiori-style graphical user interface based on HTML5.

Cockpit widgets appear in the right of the window. We will discuss these more in detail later.

The Enterprise Search is opened by choosing the magnifying glass icon, shown here on the top right of the window. Initially, the Enterprise Search icon appears in that spot. However, you have the option to move the search function to anywhere in the window by dragging the gray area to the left of the search box.

Buttons for personalizing the widgets in the cockpit appear just to the left of the search icon, on the top of the window.

A collapsible menu resides on the left. The icon with 3 horizontal lines in the top left corner is a toggle to open and close the menu.
When the menu is open, you can use the menu search field to find menu items quickly.

For example, you could type “item master” to quickly find the Item Master Data transaction in the menu. As you type, the menu item is found. You can then click on the menu item to open it.
In release 9.1, the Enterprise Search function has been improved. Open the Search function by using the magnifying glass icon.

As before, you start the Enterprise Search by typing into the search box.

One new feature is the option to save a frequent search by creating a search template. Use the star-shaped icon to open the Search Template window. Just give it a name and save the template for later use. The star-shaped icon will turn yellow after a template has been saved.

When you want to use that search again, just use the triangular dropdown icon to choose your saved template. Templates can be edited or deleted as needed. The triangular dropdown icon also brings you to a History tab that saves your prior search history.
Add User-Defined Object to Search

You can add user-defined objects (UDO) to the Enterprise Search.

- Open the Search Customization window
- Drag UDOs into a category for search results
- Then add related user-defined fields to the search
- Use the Export option to save a backup of the configuration

You can add user-defined objects to the Enterprise Search. To open the Search Customization window, open the Enterprise Search, choose the Settings icon on the far right tab. On the tab you have three options: setting up search customization, importing the search customization and exporting search customization.

In the window you can drag a user-defined object from the Unsearchable UDOs area into one of the categories. This will control under which relevant search results display. Once you add a UDO, then you can customize searchable user-defined fields. Then when you perform an enterprise search, you will be able to display results for data related to these user-defined objects and fields.

After finishing the customization it is recommend you use the Export Search Customization option to save a backup of the configuration.
Let us spend a moment to discuss what types of widgets are available in the role-based cockpit.

There are five basic types of widgets found in the cockpit, regardless of the role.

One new type of widget available as of release 9.1 is the KPI widget. This widget allows you to quickly spot whether or not you have achieved your target for a key performance indicator, such as sales targets or gross profit margin. The value shown in large type, the color and the up/down arrow make it easy to see if a target is reached and how the values are trending.

The second type of analytic widget is one that has been available for awhile, the dashboard. As before, the dashboards can be created in either the SAP Business One’s designer tool or in Crystal Reports. What’s new is that a larger number of pervasive analysis dashboards are prebuilt for your use and customized to common roles.

There are three new operational widgets in the new cockpit style.

The My Workbench widget covers 80% of daily operations and simplifies onboarding new users.

The Recent Updates widget displays a user’s more recent transactions, so a user can easily see their work and access those documents with one click.

The Count widget shows the number of items returned from a query. In the example shown, the count displays the number of high value customers who...
contributed to more than 9% of the profit in the prior year.

- In the following slides we will go through each type of widget and how they are used and managed.
Although the widget types are the same regardless of role, specific variations of widgets are set as default for each predefined role-based cockpit.

- Four predefined cockpits are mapped directly to four defined permission groups.
- A user is assigned to a permission group has authorization for all widgets in the related cockpit.
- A user may have the ability to access and use other widgets based on additional authorizations.

Although the widget types are the same regardless of role, specific variations of widgets are set as the default for each predefined role based cockpits. Four predefined cockpits have been created for sales, purchasing, finance and inventory.

These four cockpits are mapped directly to four predefined permission groups.

Once a user is assigned to a permission group, he has authorization for the widgets associated with the cockpit associated with that group.

A user may have the ability to access and use other widgets based on authorizations in general authorizations that are given to that specific user.
For example, the warehouse manager wants his team members to use the inventory cockpit. Therefore, he asks the IT manager to assign the inventory permission group to each user on his team. When the permission group is assigned, each user can access the widgets associated with that cockpit.

The inventory permission group gives full authorization for the inventory cockpit’s widgets.

For example, the warehouse manager wants his team members to use the inventory cockpit. Therefore, he asks the IT manager to assign the inventory permission group to each user on his team. When the permission group is assigned, each user can access the widgets associated with that cockpit.

The inventory cockpit includes a workbench widget with everyday inventory transactions, a count widget for each user’s own open inventory transfer requests and a list of recent updated transactions. The permission group for inventory gives full authorization for key performance indicators displaying overall, inbound and outbound inventory values as well as inventory turnover for the year. It also gives access to dashboards that display top items in terms of inventory value and inventory turnover by time, items and warehouse.
In the *Users-Setup* window, add a permission group to the user profile.

Then the user will appear in the *Permission Group* window as assigned to the group.

Here we see that the warehouse manager has assigned two members of his team Mary and John to the inventory permission group.

Please note that if you add the user to the list in the Permission Group window, this does not give the authorization to the cockpit. You must assign the permission group in the *User – Setup* window.

A superuser will have authorization for all cockpit widgets.
Now we will take a detailed look at each of widget types found in the cockpit, beginning with the workbench.

Here we see the inventory workbench. Inventory management transactions are presented as a standardized and visualized work process.

From this workbench, you can open several goods movement transactions for moving stock items in and out of the warehouse. You can also access transactions for managing inventory counts, item master data, price lists and inventory reports.
In addition to the business process transactions, each workbench also enables a user to take actions right away without having to switch among functions or modules. Context menu options are available for each visual transaction with a blue dot.

For example, one of the warehouse team members Mary can easily launch actions directly from the workbench to help with her daily tasks. From the context menu for the Goods Receipt PO, she can launch the open items list, the document drafts report, the stock status report and the stock in warehouse report.
The other workbenches provide similar functionality, but tailored to the particular role of the user. Here we see the sales workbench with the sales process visualized. Users can launch related transactions and widgets from the context menu of icons with a blue dot.

The context menu of the sales quotation shows several actions: viewing the open items list, opening the a list of draft documents, and viewing price reports or inventory status.

One nice option not shown in the graphic is that you can also a view business object count from some context menus. For example, the context menu of the Sales Order icon shows the number for sales orders not delivered.
Similarly, the financial workbench focuses on the transactions a financial user needs: payment processing, journal entries, accessing accounts, internal and external reconciliation, the posting periods process and financial reports. The workbench includes a context menus available for each transaction with a blue dot.
The purchasing workbench has a visual outline of the majority of transactions needed in a purchasing role. Additionally, context menus provide related transactions.
A business object count widget displays the number of results from a query. Predefined widgets exist to count:
- Sales Orders Not Delivered
- Open A/R Invoices
- Purchase Orders Not Received
- Open Inventory Transfer Requests

You can create your own count widgets, such as this delivery count widget.

From the widget you can:
- Open the query results
- Open a related business object

Additionally, you can create your own count widgets, such as the delivery count widget shown in this graphic. We will cover how to do this at the end of this topic.

From the count widget you can open the detailed results of the query to see more details as well as open the window for a related business object. In this case we can see the number of deliveries created today, open a list of those deliveries or the delivery note window.
Recently Updated widget reflects new and updated master data, marketing documents, chart of accounts and many more types of information.

As Mary does her daily work, the recent updates widget captures her recent transactions. She can click on the Stock Transfer document to open the transaction and view her recent work and make changes if needed.
You can personalize the cockpit to better organize your work environment. Move, add or delete widgets.

- **Use this icon to edit the cockpit**
  - The cockpit widgets will gray out
  - You can drag unwanted widgets to the trash can
  - You can rearrange the widgets

- **Use this icon to open the Widgets Gallery**
  - Choose widgets by clicking on the plus symbol below each widget
  - Then return to the cockpit by using the arrow

- **Use this icon to finish editing**

You can personalize the cockpit to better organize your work environment.

You change the widgets in your cockpit at any time. You can move, add or delete widgets.

Choose the pencil-shaped icon and the cockpit grays out allowing you to edit. You can drag unwanted widgets to the trash can or rearrange the widgets on the screen.

The plus-shaped icon will appear once you have begun to edit the cockpit. Choose this icon to open the Widgets Gallery. The Widgets Gallery contains all your available widgets. Find the widget you want then click on the plus symbol below the widget to add it to your cockpit.

When you finish editing choose the checkmark.
In the Widgets Gallery, the default is to show all available widgets. You can narrow down the selection with the dropdown. Options are to show only dashboards, key performance indicators, count widgets, workbenches or the recent updates widget.

You also have the option to find a widget by name using the search field.

Once you find a widget you want, choose the plus icon below the widget. After you have chosen all the widgets you want, use the back arrow to return to your cockpit.
Maria would like to quickly see how many deliveries are created in her warehouse each day. The answer for this need is a new count widget based on a user-defined query.

To design a count widget, a user needs full authorization for Count Widget Setup as well as access to an existing user-defined query.

In our case, Mary uses an existing query that finds all the deliveries that are created today in warehouse 01. She then makes the initial settings for the count widget by giving it a code, a name and a description. She links the delivery document to her count widget so that she can open the delivery form from the widget in the cockpit. She chooses the query that finds today’s deliveries. When it is attached to the count widget, it will count the number of deliveries that the query returns.

Once the count widget is saved, it will appear in the widget gallery. From there, Mary can easily add it to her cockpit.
Predefined role-based cockpits provide widgets tailored to a user’s daily operations and analytic needs.

Standard widgets include dashboards, key performance indicators, my workbench, my recent transactions and count widgets.

You can use the cockpit analytics to gain insights and then launch actions from context menus inside widgets.

The HTML5 interface using SAP’s Fiori concept is available for personal computers, tablets and mobile devices.

You can enable the cockpit for all users in General Settings.

Role-based cockpits are assigned via permission groups.

Users can rearrange, delete or add widgets from a widget gallery.

An improved enterprise search gives new flexibility to reuse previous searches and add UDOs to your searches.

You can create new count widgets based on user-defined queries.

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Predefined role-based cockpits provide widgets tailored to a user’s daily operations and analytic needs.

Standard widgets include dashboards, key performance indicators, my workbench, my recent transactions and count widgets.

You can use the cockpit analytics to gain insights to your business than launch actions from context menus insight the widgets.

The HTML5 interface, which uses SAP’s Fiori concept, is available for personal computers, tablets and mobile devices.

You can enable the new cockpit for all users in General Settings. Individual users can decide whether to use a cockpit or not.

Role-based cockpits are assigned via permission groups.

Users can rearrange, delete or add widgets from a widget gallery.

An improved enterprise search gives new flexibility to reuse previous searches from history or saved as templates, and the option to add user-defined objects and fields to your searches.

You can create new count widgets based on user-defined queries.
Thank you

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