

SAP Business One 8.8 PL12

Activating the Cockpit (excluding dashboards)

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Objectives



At the end of this session, you will be able to:

- 1. Enable the cockpit in SAP Business One 8.8**
- 2. Configure the basic cockpit components**

1. Activating the Cockpit

- 1.1 Prerequisites
- 1.2 Additional Information
- 1.3 General Settings – Activation on company level
- 1.4 Tools Menu – Activation on user level

2. Cockpit Overview

- 2.1 New Menu
- 2.2 Search Box
- 2.3 Browser Widget
- 2.4 Most Common Functions Widget
- 2.5 Open Documents Widget
- 2.6 Messages and Alerts Widget
- 2.7 Authorization

3. Map Services

Note: The Dashboard Widget is not covered in this session. See session about Installing SAP Business One 8.8 PL12 Integration Components and activating sample dashboards

1.1 Prerequisites to enable the cockpit functionality



- Basic prerequisite
 - Installed SAP Business One 8.8 PL12 (or newer) Server and Client
 - To learn how to use the Upgrade Wizard watch the related session on SAP Business One 8.8 Landing Page
 - User authorization for General Widgets (see 2.7 Authorization)

- If you want to use the *Browser Widget* or the *Map Services*
 - Configured internet connection on the clients

- If you want to use the Dashboards Widgets
 - Installed and configured *SAP Integration Component* on the server
 - To learn how this works watch the related session
 - Installed Adobe Flash Version 9 or newer on the client

1.2 Additional Information



- SAP Business One 8.8 Landing page: <http://channel.sap.com/sbo/88>

For last-minute information

- Check the ReadMe delivered with the downloaded packages

Access these guides on the [SAP Business One Innovations](http://channel.sap.com/sbo/innovations) landing page:
<http://channel.sap.com/sbo/innovations>

- Working with the Cockpit ([SAP Note 1471016](#))

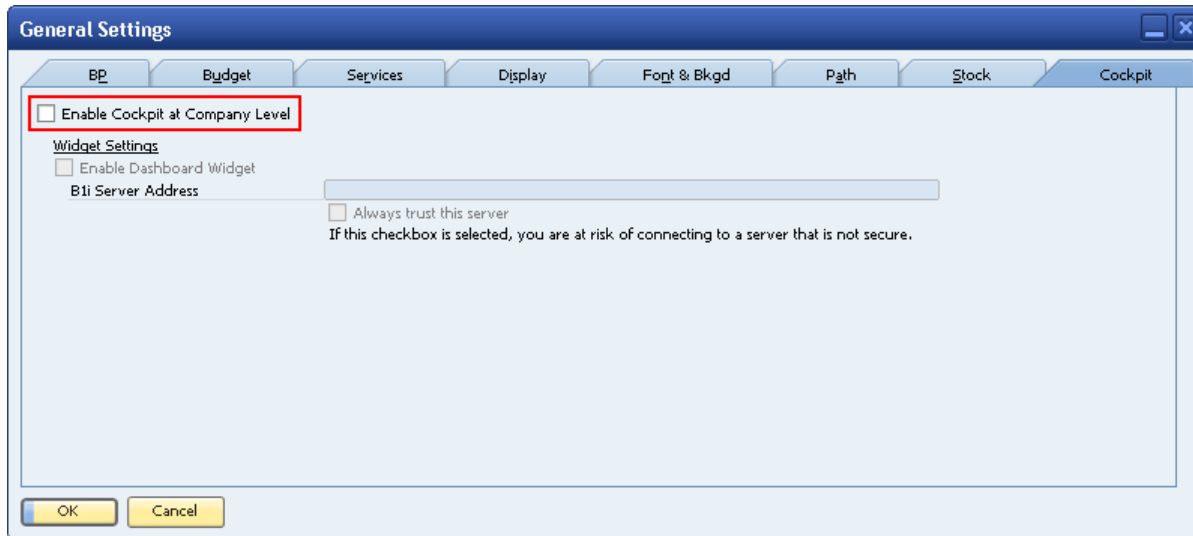
1.3 General Settings

Activation on company level



To activate the cockpit functionality on **company level**:

- Open *Administrator: System Initialization: General Settings* Folder *Cockpit*
- Check the *Enable Cockpit at Company Level* Checkbox



Note 1: You need to logon again to this company

Note 2: Do not check the „Enable Dashboard Widget“ at this time.

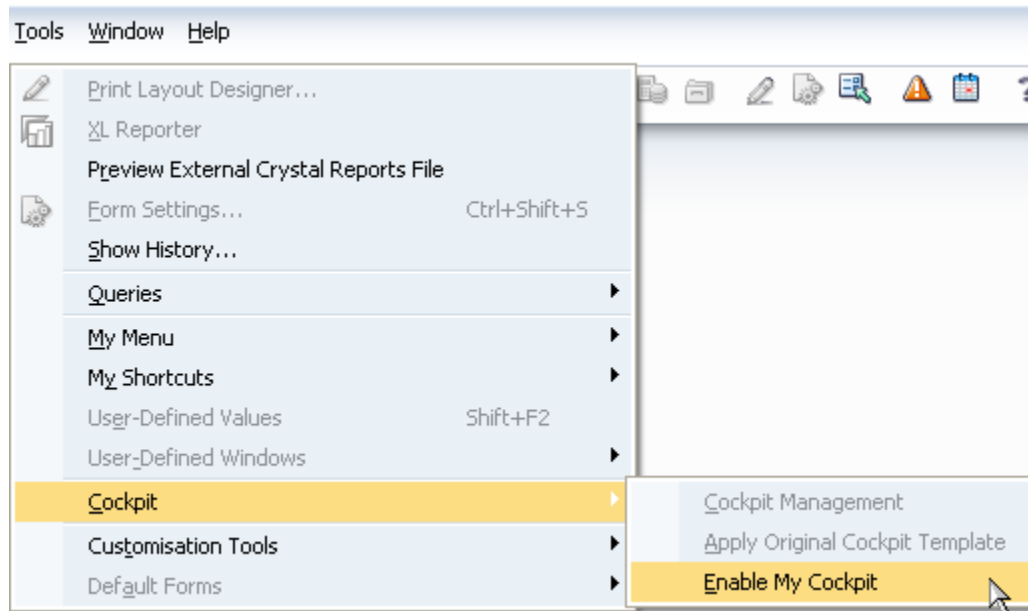
To use the Dashboard Widget the *Integration Component* needs to be installed first. See the separate Enablement Session about this topic.

1.4 Tools Menu

Activation on user level

To activate the cockpit functionality on **users level**:

- Check the menu *Tools:Cockpit:Enable My Cockpit*



Note: You need to logon again to this company to make this change effective

1. Activating the Cockpit

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- 1.4 Tools Menu – Activation on user level

2. Cockpit Overview

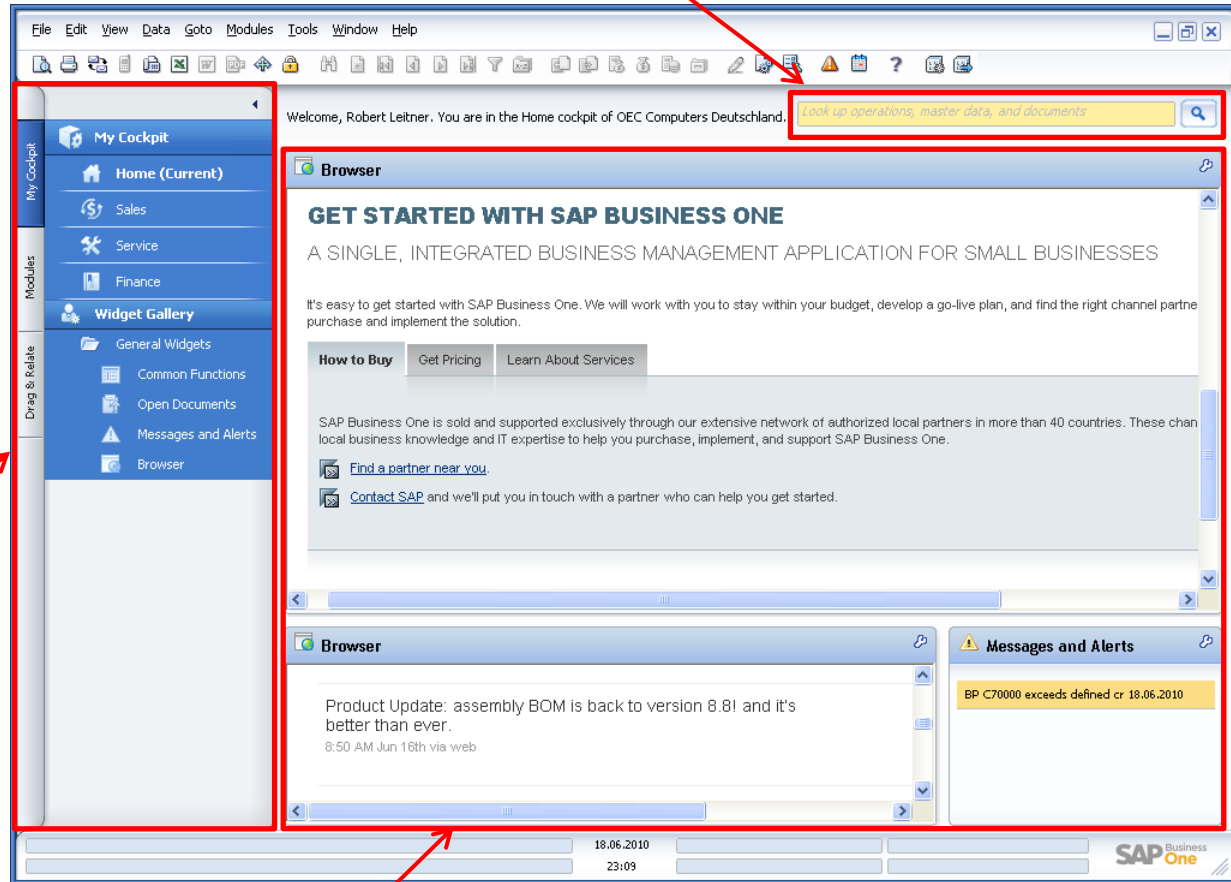
- 2.1 New Menu
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- 2.7 Authorization

3. Map Services

2. Cockpit Overview Different Areas



Search box



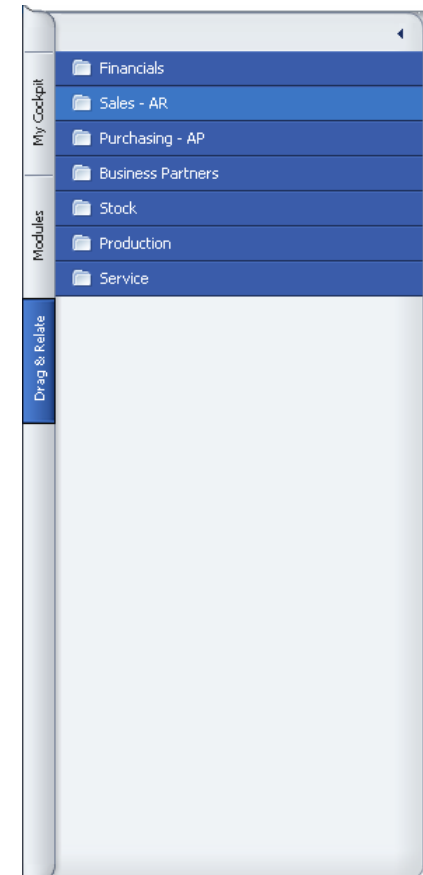
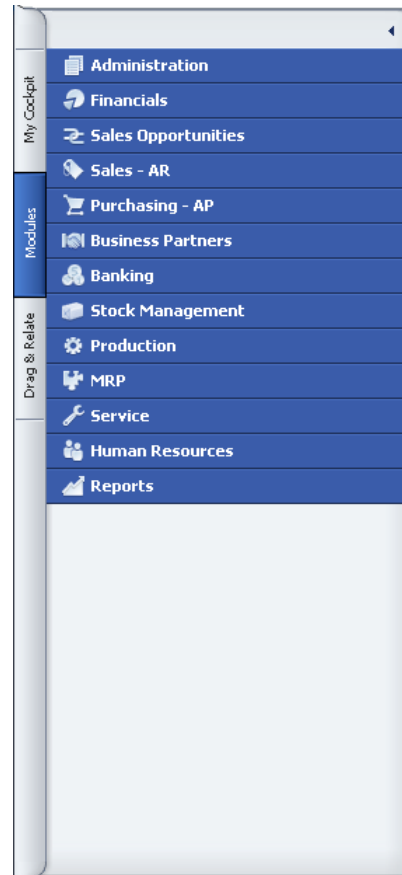
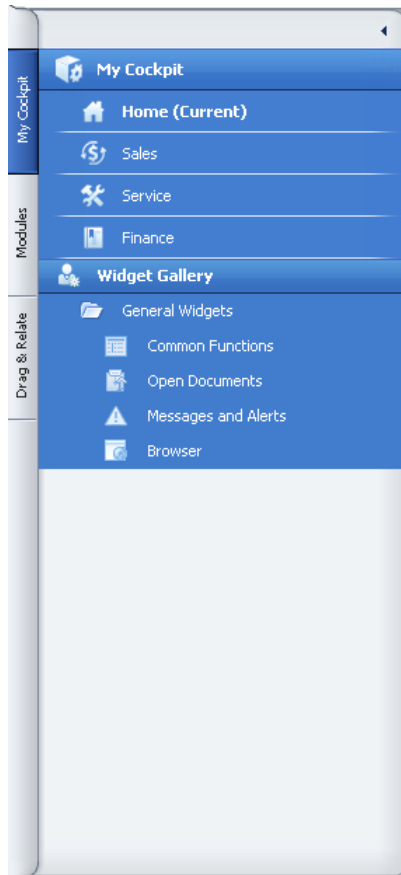
New Menu

Widget area

2.1 New Menu

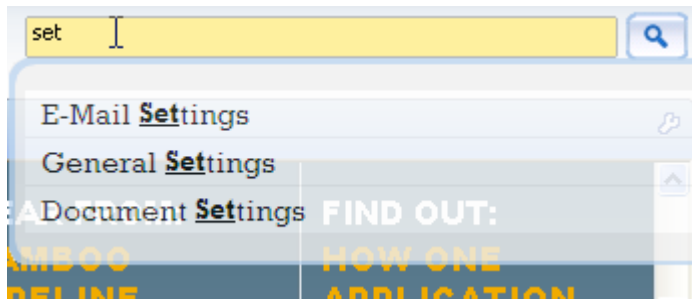


- New Menu has three main sections
- Menu can be hidden



2.2 Search Box Quick Access to Functions and Data

- Start typing and instantly searching for
 - Menu functions



- Press return to lookup in
 - Business Partner Master Data
 - Item Master Data
 - Marketing Documents

The screenshot shows the 'Lookup Results' dialog box in SAP. The search input field contains '11'. The results are categorized into three groups:

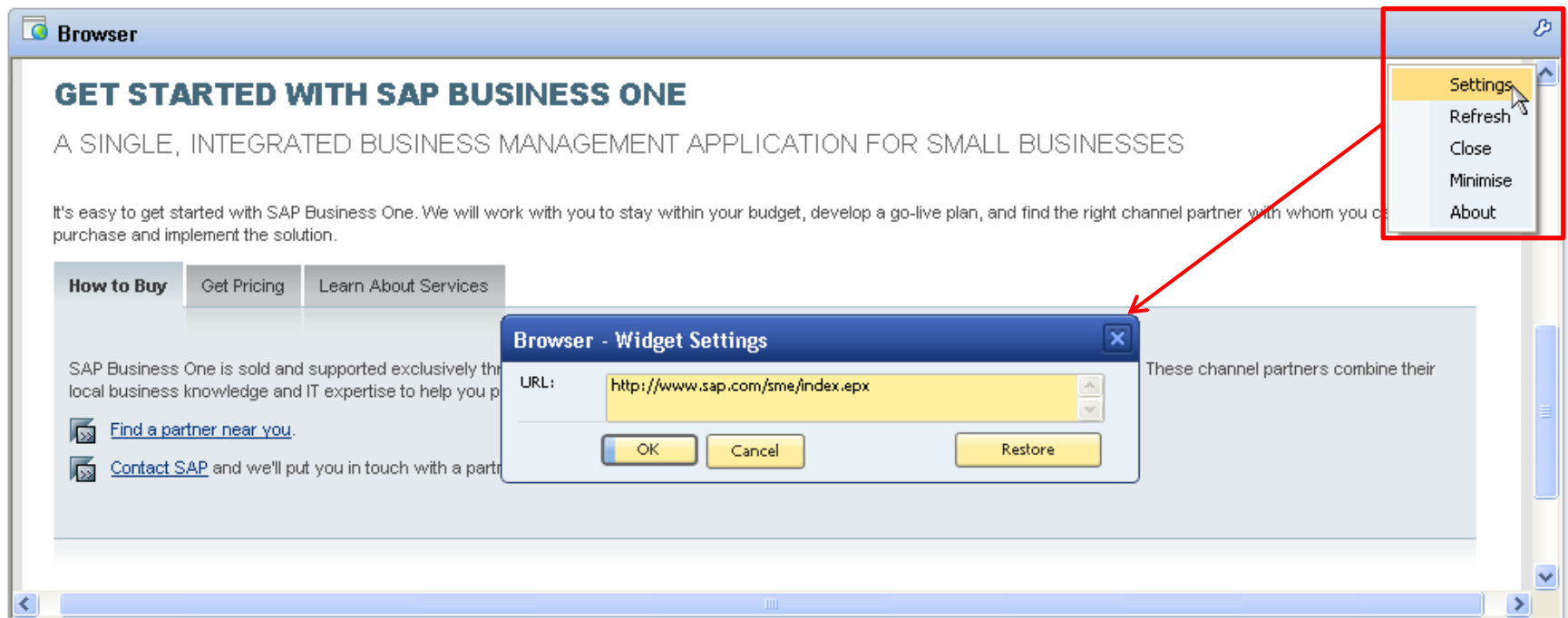
- Items (2)**
 - 1 → C00011 Speicher DDR RAM 512 MB
 - 2 → I00011 Belkin 4-Port USB 2.0 Travel Hub
- Business Partners (3)**
 - 1 → C42000 Customer CIT Beratungshaus 511/115-7700
 - 2 → C70000 Customer Broup Inc. (1) 711/711-610
 - 3 → V23000 Supplier Soft- und Hardware Gr 711/882-4610
- Marketing Documents (96)**
 - 1 Deliveries → 11 SG Elektronik
 - 2 Deliveries → 110 Büroausstatter Mayer
 - 3 Deliveries → 111 CIT Beratungshaus
 - 4 Deliveries → 112 INTINT, Inc
 - 5 Deliveries → 113 SG Elektronik
 - 6 Deliveries → 114 Broup Inc.
 - 7 Deliveries → 115 PC Welt GmbH & Co.KG

Each group has a 'Show All Results for This Group' link. A 'Close' button is located at the bottom left of the dialog box.

2.3 Cockpit Browser Widget

Watch your most important information of your intranet or the internet

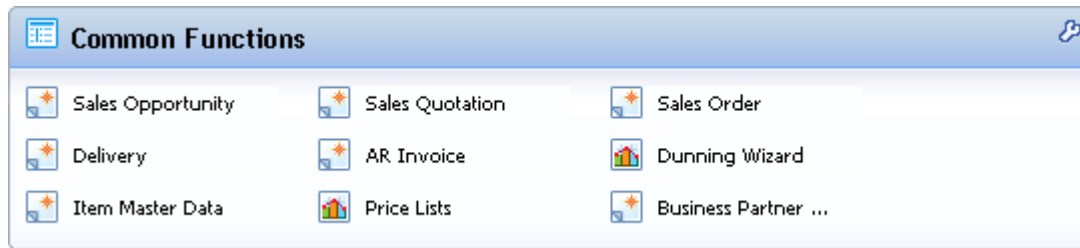
- Activities in your Internet-Shop
- Activities on stock market, important news
- Important Twitter Information
- Social networks or Communities
- ...



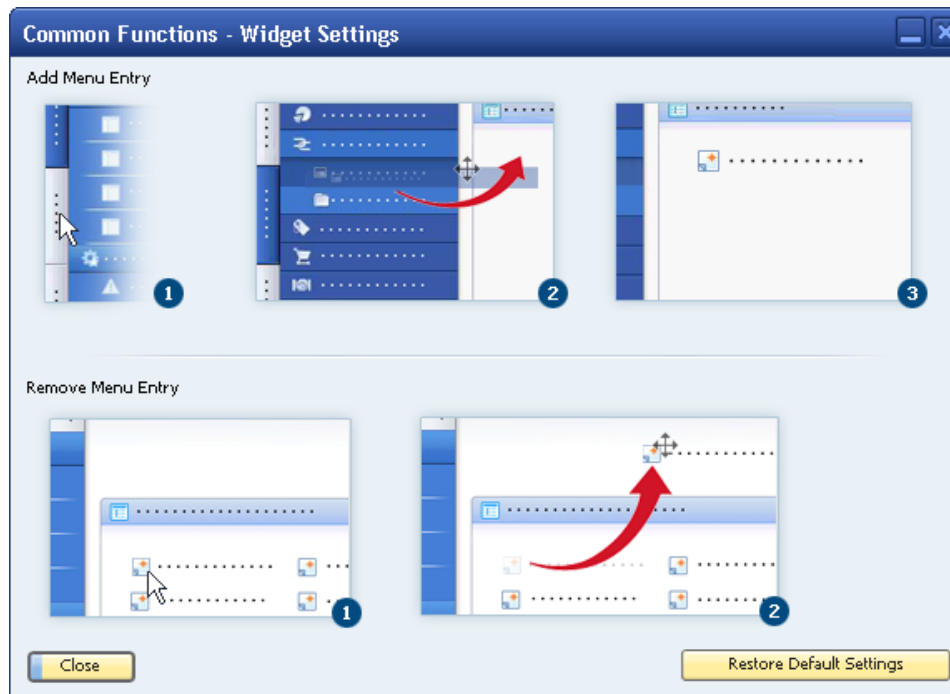
The screenshot displays the SAP Business One Browser Widget interface. The main content area shows the heading "GET STARTED WITH SAP BUSINESS ONE" and a sub-heading "A SINGLE, INTEGRATED BUSINESS MANAGEMENT APPLICATION FOR SMALL BUSINESSES". Below this, there is a paragraph of introductory text and a navigation bar with tabs for "How to Buy", "Get Pricing", and "Learn About Services". A "Browser - Widget Settings" dialog box is open in the foreground, showing a URL field with the text "http://www.sap.com/sme/index.epx" and buttons for "OK", "Cancel", and "Restore". A red arrow points from the "Settings" option in the widget's context menu to the dialog box. The context menu also includes "Refresh", "Close", "Minimise", and "About".

2.4 Cockpit Most Common Functions Widget

- Access your most important functions with a single click

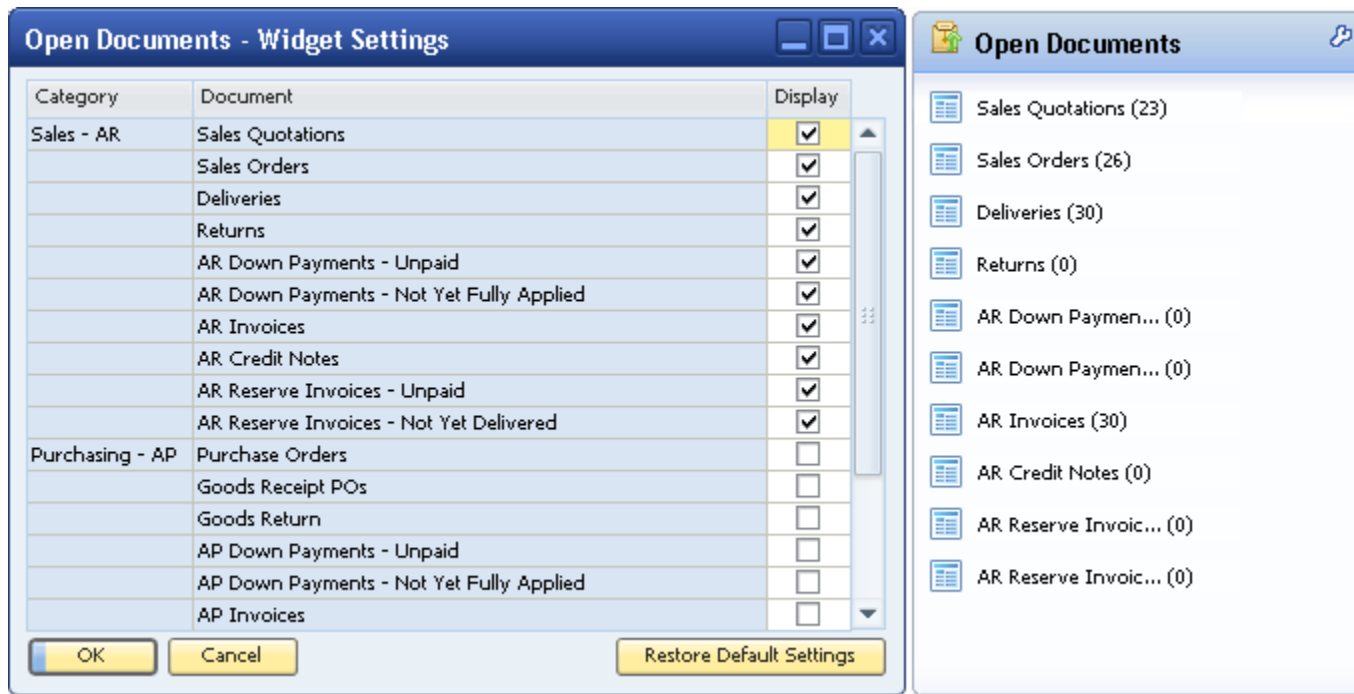


- Build your own Common Functions widget with drag and drop



2.5 Cockpit Open Documents Widget

- Monitor your most important document types
- Never omit to deliver an open Sales Order
- Easy configuration to focus on your personal spot



The image shows two screenshots from SAP Business One. The left screenshot is the 'Open Documents - Widget Settings' dialog box, which contains a table for configuring document display. The right screenshot shows the 'Open Documents' widget in the SAP cockpit, displaying a list of document counts for various categories.

Category	Document	Display
Sales - AR	Sales Quotations	<input checked="" type="checkbox"/>
	Sales Orders	<input checked="" type="checkbox"/>
	Deliveries	<input checked="" type="checkbox"/>
	Returns	<input checked="" type="checkbox"/>
	AR Down Payments - Unpaid	<input checked="" type="checkbox"/>
	AR Down Payments - Not Yet Fully Applied	<input checked="" type="checkbox"/>
	AR Invoices	<input checked="" type="checkbox"/>
	AR Credit Notes	<input checked="" type="checkbox"/>
	AR Reserve Invoices - Unpaid	<input checked="" type="checkbox"/>
	AR Reserve Invoices - Not Yet Delivered	<input checked="" type="checkbox"/>
Purchasing - AP	Purchase Orders	<input type="checkbox"/>
	Goods Receipt POs	<input type="checkbox"/>
	Goods Return	<input type="checkbox"/>
	AP Down Payments - Unpaid	<input type="checkbox"/>
	AP Down Payments - Not Yet Fully Applied	<input type="checkbox"/>
	AP Invoices	<input type="checkbox"/>

The 'Open Documents' widget displays the following list:

- Sales Quotations (23)
- Sales Orders (26)
- Deliveries (30)
- Returns (0)
- AR Down Paymen... (0)
- AR Down Paymen... (0)
- AR Invoices (30)
- AR Credit Notes (0)
- AR Reserve Invoic... (0)
- AR Reserve Invoic... (0)

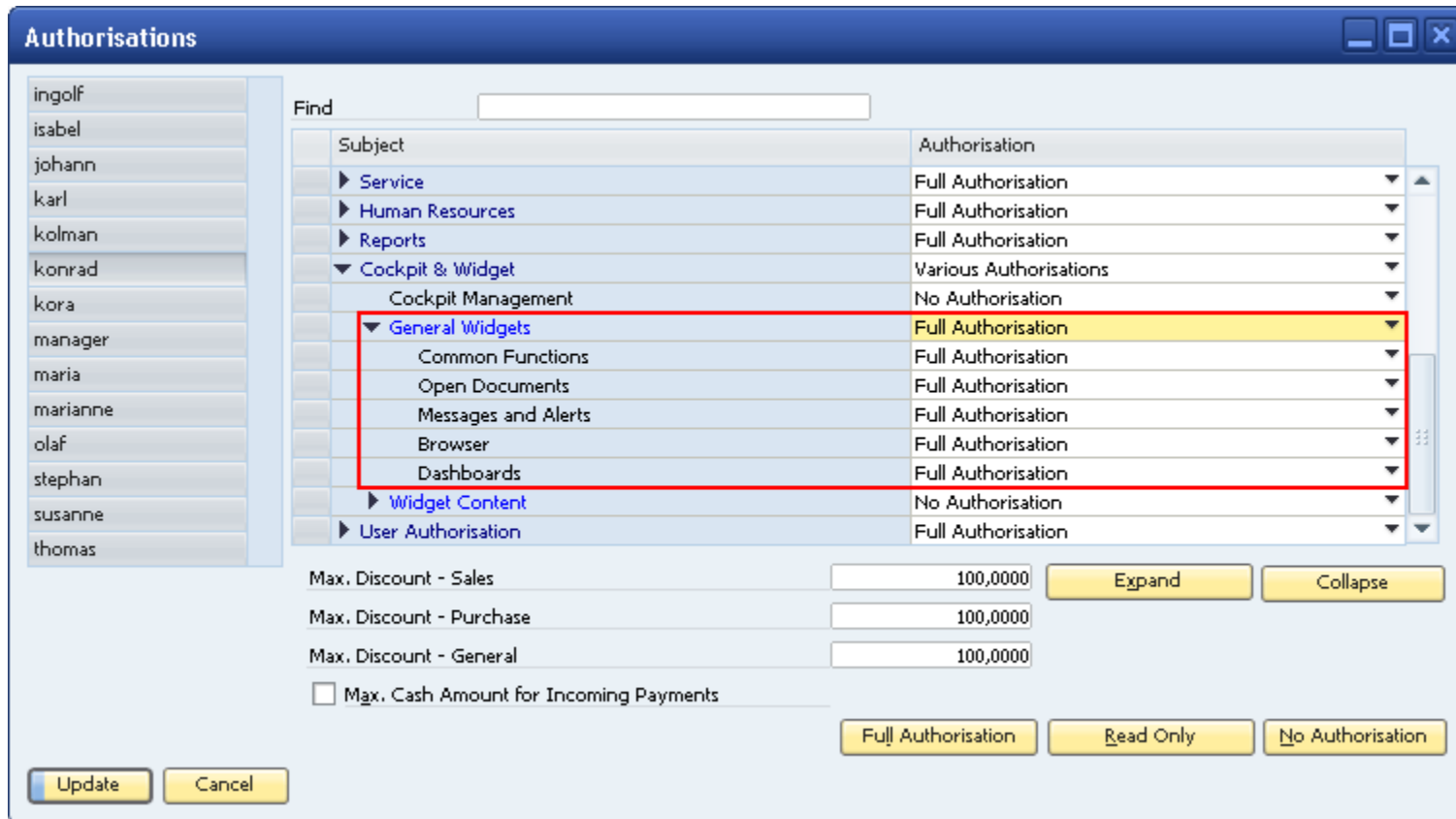
2.6 Cockpit Messages and Alerts Widget

Instant access to your Messages and Alerts



2.7 Cockpit Authorization

In order to use the Widgets in the Cockpit the following permissions needs to be assigned to the user



The screenshot shows the 'Authorisations' window in SAP. On the left, a list of users is displayed, including 'ingolf', 'isabel', 'johann', 'karl', 'kolman', 'konrad', 'kora', 'manager', 'maria', 'marianne', 'olaf', 'stephan', 'susanne', and 'thomas'. The main area contains a 'Find' search box and a table with columns 'Subject' and 'Authorisation'. A red box highlights the 'General Widgets' sub-entry under 'Cockpit & Widget', which is set to 'Full Authorisation'. Other entries include 'Service', 'Human Resources', 'Reports', 'Cockpit Management', 'Common Functions', 'Open Documents', 'Messages and Alerts', 'Browser', 'Dashboards', 'Widget Content', and 'User Authorisation'. Below the table, there are input fields for 'Max. Discount - Sales', 'Max. Discount - Purchase', and 'Max. Discount - General', all set to '100,000'. There is also a checkbox for 'Max. Cash Amount for Incoming Payments'. At the bottom, there are buttons for 'Update', 'Cancel', 'Full Authorisation', 'Read Only', and 'No Authorisation'.

Subject	Authorisation
▶ Service	Full Authorisation
▶ Human Resources	Full Authorisation
▶ Reports	Full Authorisation
▼ Cockpit & Widget	Various Authorisations
Cockpit Management	No Authorisation
▼ General Widgets	Full Authorisation
Common Functions	Full Authorisation
Open Documents	Full Authorisation
Messages and Alerts	Full Authorisation
Browser	Full Authorisation
Dashboards	Full Authorisation
▶ Widget Content	No Authorisation
▶ User Authorisation	Full Authorisation

Max. Discount - Sales: 100,000 [Expand] [Collapse]
Max. Discount - Purchase: 100,000
Max. Discount - General: 100,000
 Max. Cash Amount for Incoming Payments

[Update] [Cancel] [Full Authorisation] [Read Only] [No Authorisation]

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3. Map Services

3. Map Services



Business Partner Master Data

Code	SAP0001	Customer	Account Balance	Local Currency
Name	SAP AG		Deliveries	0,00
Foreign Name			Orders	0,00
Group	Einzelhandel		Opportunities	
Currency	Euro			
Federal Tax ID				

General | Contact Persons | **Addresses** | Payment Terms | Payment System | Accounting | Properties | Remarks

Bill to	Ship to
Define New	Address Name
Ship to	Address Line 2
LGD	Address Line 3
WDF	Street / PO Box
Define New	Block
	City
	Zip Code
	County
	State
	Country
	Federal Tax ID
	Building/Floor/Room

Set as Default

OK Cancel Related Service Calls Activity Related Activities

Show Location in Web Browser

Google Maps - Microsoft Internet Explorer

Search Favorites

+AG+LGD+Hasso+Plattner+Ring++Walldorf+++Germany++

Shopping Mail more

Hasso Plattner Ring Walldorf Germany

Search Maps Show search options

Print Send Link

More... Map Satellite

A SAP AG - more info >
Dietmar-Hopp-Allee 16, 69190 Walldorf, Deutschland - 06227 747474

B SAP Deutschland AG & Co.KG - more info >
Hasso-Plattner-Ring 7, 69190 Walldorf, Deutschland

C SAP AG - more info >
Robert-Bosch-Straße 30, 69190 Walldorf, Deutschland

D Realtech Consulting GmbH - more info >
Industriestraße 39, 69190 Walldorf, Deutschland - 06227 837-0

*SAP und REALTECH erweitern gemeinsame

+ SAP AG LGD Hasso Plattner Ring ...

Done Internet

Thank you!

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June 2010

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