**SAP Business One
User Guide**

Working with the Cockpit

Applicable Release:

SAP Business One 8.8

Patch Level 12 and Higher

All Countries

English

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Introduction

SAP Business One 8.8 PL12 and higher versions contain the cockpit, a personalized work center where you can view, search, organize, and perform your regular work and related activities in SAP Business One. This document describes how to work with the cockpit from the perspectives of both system administrators and regular company users.

With the cockpit, you no longer have to navigate in the traditional menus to look for data and functionalities every time you need them. The cockpit enables you to:

- Group your most frequently used functionalities in one place

- Focus on your responsibilities with the necessary information and data presented to you

- Look up and locate all operations, master data, and marketing documents

Note

To work with the cockpit, you must install SAP Business One 8.8 PL12 or higher versions.

This document provides information on how to perform the following tasks:

- Enabling and disabling the cockpit

- Working with SAP predefined cockpits

- Creating your own cockpit

- Working with cockpit widgets (small applications in the cockpit that help you to perform specific tasks)

- Working with the map service

- Looking up operations, master data, and marketing documents

Cockpit Layout Introduction

The cockpit provides you with a new layout in SAP Business One.

Note

You can view the new layout only after you have enabled the cockpit both at company level and at user level. For more information, see Enabling the Cockpit.

- Navigation panel:

  The menu structure on the left side of the application window, where you can navigate in the different SAP Business One menus distributed on the following three tabs:

  o *My Cockpit*: the menu list for cockpits and cockpit widgets

  o *Modules*: the traditional SAP Business One *Modules* menu

  o *Drag & Relate*: the traditional SAP Business One *Drag & Relate* menu

- Canvas:

  The area to the right of the navigation panel in the SAP Business One application window, where you can work with cockpit widgets and the lookup function.

Enabling and Disabling the Cockpit

When you start to use the cockpit, the user interface of the traditional SAP Business One application window changes. In case some customers or users might want to work with the traditional SAP Business One user interface, SAP provides a two-level setting method for enabling and disabling the cockpit:

1. Company level

   An authorized user, such as a system administrator, decides for the company whether to use the cockpit or not.

   ### Note

   To enable the cockpit at company level, you require the correct user authorization. For more information, see Authorizations.

2. User level

   After the cockpit is enabled at company level, company users can decide individually whether to work with the cockpit or not.

   ### Recommendation

   Use the following settings to better view your cockpit:

   - Minimal screen size: 800x600 pixels

   - Screen resolution: 1280x1024 pixels

   - Font size: 10

Enabling the Cockpit

Prerequisites

- To use the cockpit, you have installed SAP Business One PL12 or higher.

- To enable the cockpit at company level, you have obtained the correct user authorization. For more information, see Authorizations.

Procedures

Enabling the Cockpit at Company Level

1. From the SAP Business One *Main Menu*, choose *Administration* → *System Initialization* → *General Settings*.

2. On the *Cockpit* tab, select the *Enable Cockpit at Company Level* checkbox.

3. For your settings to take effect, log off and then log on again to the same company.

   ### Note

   After you enable the cockpit successfully for the entire company, users in your company need to individually enable the cockpit to actually view and use it.

Enabling the Cockpit at User Level

After the system administrator enables the cockpit successfully for the whole company, you need to individually enable the cockpit to access it in SAP Business One. If you prefer to use the traditional SAP Business One user interface, you can choose not to enable the cockpit.

1. To enable your own cockpit, from the SAP Business One menu bar, choose *Tools → Cockpit.*

2. Choose *Enable My Cockpit.*

3. For your settings to take effect, log off and then log on again to the same company.

   After you log on again, the traditional SAP Business One layout changes and the *Home* cockpit appears as the default cockpit. For more information about the new layout, see Cockpit Layout Introduction.

Disabling the Cockpit

If you want to use the traditional SAP Business One user interface, you can disable the cockpit. There are two levels at which you can do so:

- Disabling the cockpit at company level

  An authorized user, such as a system administrator can disable the cockpit for the whole company. This prevents all the users in the company from viewing or accessing the cockpit, even if they have enabled the cockpit for themselves.

  ![Note icon] **Note**

  After you disable the cockpit at company level, other users can still work with the cockpit until their next logon.

- Disabling the cockpit at user level

  After the cockpit is enabled for the entire company, users can decide for themselves whether to use the cockpit or not. Disabling your own cockpit does not prevent other users from working with the cockpit.

Prerequisites

To disable the cockpit at company level, you have obtained the correct user authorization. For more information, see Authorizations.

Procedures

Disabling the Cockpit at Company Level

1. From the SAP Business One navigation panel, select the *Modules* tab.

2. Choose *Administration → System Initialization → General Settings.*

3. On the *Cockpit* tab, deselect the *Enable Cockpit at Company Level* checkbox.

4. For your settings to take effect, log off and then log on again to the same company.

Disabling the Cockpit at User Level

1. To disable your own cockpit, from the SAP Business One menu bar, choose *Tools → Cockpit.*

2. Deselect the *Enable My Cockpit* checkbox.

3. For your settings to take effect, log off and then log on again to the same company.

Working with Cockpits

To work with the cockpit, you can work with SAP predefined cockpits or create your own cockpits.

- SAP provides the following predefined cockpits: *Home*, *Sales*, *Service*, and *Finance*.

- An authorized user, such as a system administrator in you company can create new cockpit templates according to the business needs of the company and publish them to all the company users. For more information, see Creating a New Cockpit Template.

Prerequisites

You have successfully enabled the cockpit for your account.

Selecting a Predefined Cockpit

After you enable the cockpit, the *Home* cockpit is the default cockpit you see the first time you log on to SAP Business One. You can then choose from among the other predefined cockpits according to your work area and job responsibilities, and modify the cockpit settings and layouts according to your needs.

For each of the SAP predefined cockpits, SAP defines the cockpit widgets and widget settings according to the job role each cockpit addresses.

Procedure

To start working with an SAP predefined cockpit, from the SAP Business One navigation panel, under *My Cockpit*, select the cockpit you want to use.

You can observe the word *Current* beside the cockpit you select, and the predefined widgets appear in the canvas area.

Customizing a Cockpit

Procedure

To customize a cockpit, do the following, as needed:

1. Arrange the necessary widgets.

   Select the widgets you want to work with and define the widgets according to your needs. For more information, see Adding and Setting Up Your Widgets.

2. Adjust the navigation panel.

   - To adjust the width of the navigation panel, drag the border line of the navigation panel horizontally.

   - To collapse the navigation panel on the left of the application window, click any of the names of the three tabs or the ◀ icon in the right upper corner of the panel.

   - To expand the navigation panel after you collapse it, click any of the names of the three tabs.

     The navigation panel appears and displays the tab you chose.

Applying the Original Cockpit Template

SAP Business One automatically saves the user-defined settings each time you make changes. To restore your cockpit to default settings and layouts, you can use the *Applying Original Cockpit Template* menu.

Procedure

1. To restore the default settings, do one of the following:

   o From the SAP Business One menu bar, choose *Tools → Cockpit* and choose *Apply Original Cockpit Template.*

   o From the SAP Business One toolbar, choose (*Apply Original Cockpit Template*).

   A message warns you that all user-defined settings for this cockpit will be lost if you apply the original template.

2. Do one of the following:

   o To confirm your choice, choose the *Yes* button.

   o To cancel your choice, choose the *No* button.

Creating a New Cockpit Template

For the purpose of reinforcing standard procedures in your company or for other reasons, you may want to establish a new cockpit and share it with other employees in your company. SAP Business One lets you create cockpit templates at runtime.

After you create a cockpit template, you can choose to do one of the following:

- Publish the cockpit template to the company. For more information, see Publishing a Cockpit Template.

- Not publish the cockpit template and keep it for your own use.

Prerequisites

You have been assigned with the correct user authorization for creating and maintaining cockpits. For more information, see Authorizations.

Procedure

1. To create a new cockpit template tailored to your business needs, do one of the following:

   o From the SAP Business One menu bar, choose *Tools → Cockpit → Cockpit Management.*

   o From the SAP Business One toolbar, choose (*Cockpit Management*).

   The *Cockpit Management – Setup* window appears.

2. In the *Cockpit Management – Setup* window, specify the following fields for the new cockpit:

   o *Name*

   o *Description*

   o *Provider*

3. To confirm the information you enter, choose the *OK* button.

   The new cockpit appears in the SAP Business One navigation panel, below *My Cockpit*, at the bottom of the cockpit list.

4. To modify the information of a user-created cockpit, specify the fields you need to update, and choose the *OK* button. You can update the following fields:

   o *Name*

   o *Description*

   o *Provider*

   ![Note icon] **Note**

   You cannot modify the information for SAP predefined cockpits.

5. To define the cockpit you have just created, see Customizing a Cockpit.

   ![Note icon] **Note**

   You need to publish a new cockpit as a template if you want the users in your company to see and use it. For more information, see Publishing a Cockpit Template.

Publishing a Cockpit Template

After you create a cockpit, you can publish it as a template to make it available for general company use.

Prerequisites

You have been assigned with the correct user authorization for creating and maintaining cockpits. For more information, see Authorizations.

Procedure

1. To publish a user-created cockpit, do one of the following:

   o From the SAP Business One menu bar, choose *Tools → Cockpit → Cockpit Management.*

   o From the SAP Business One toolbar, choose ![icon] *(Cockpit Management)*.

   The *Cockpit Management – Setup* window appears.

2. In the *Cockpit Management – Setup* window, select the cockpit you want to publish and choose the *Publish* button.

   The system automatically specifies the following fields for your cockpit:

   o *Publication Date*

   o *Publication Time*

   o *Published By*

Removing a Cockpit

Note

You cannot delete an SAP predefined cockpit.

At runtime, you can delete published and unpublished user-defined cockpits in SAP Business One. After you complete the deletion, the following occurs:

- For a published cockpit:
    - The cockpit template is deleted from the *Cockpit Management – Setup* window, but you can still view and access the cockpit from the navigation panel.
    - When you apply the original cockpit template to this cockpit, a message informs you that the original template does not exist; applying the template deletes the current cockpit.

- For an unpublished cockpits:
    The cockpit is deleted from the *My Cockpit* menu. You can no longer access the cockpit.

Prerequisites

You have been assigned with the correct user authorization for creating and maintaining cockpits. For more information, see Authorizations.

Procedure

1. To remove a user-defined cockpit, in the *Cockpit Management – Setup* window, select the cockpit you want to delete.

2. Right-click and choose *Remove*.

    A confirmation message appears.

3. Do one of the following:
    - To confirm the deletion, choose the *Yes button*.
    - To cancel the deletion and return to the *Cockpit Management – Setup* window, choose the *No button*.

Working with Cockpit Widgets

After you successfully enable the cockpit and choose the cockpit you want to work with, your cockpit appears and displays within the canvas area the widgets you add to the current cockpit. With SAP Business One PL12, SAP delivers the following widgets to help users to build up and maintain their personalized work spaces:

- *Common Functions*
- *Open Documents*
- *Messages and Alerts*
- *Browser*
- *Dashboards*

Adding and Setting Up Your Widgets

Prerequisites

- You have successfully enabled the cockpit for your account.
- You have been assigned with the correct user authorization for the widget and the widget content. For more information, see Authorizations.

Procedures

Adding a Widget by Using Drag & Drop

1. In the SAP Business One navigation panel, under *General Widgets*, click the widget you want to add to your cockpit.
2. Drag the widget into the canvas area and drop it at the position you want it to appear.

Placing and Sizing

1. To relocate a widget within the canvas area, use the drag-and-drop function.

   Note

   You cannot place a widget in a location that already contains another widget.

2. To adjust the size of a widget, drag the border lines vertically or horizontally to expand or shrink the widget.

   Note

   The application does not support dragging the widget diagonally at the widget corner.

Working with the Dropdown Menu List

In the widget window bar, click the icon to display a dropdown menu list.

The following table lists and explains the tasks you can perform with the dropdown menu:

User Task	User Action
Maintaining the settings for a widget	Choose *Settings*. The widget settings window opens. The setting options of different widgets vary. For more information, see General Widgets.

User Task	User Action
Restoring a widget to default settings	1. Choose *Settings*. 2. In the widget settings window, choose the *Restore Default Settings* button. The widget reverts to default settings and any user-defined settings for the content and the size of the widget are lost.
Refreshing the data of a widget.	Choose *Refresh*.
Removing the widget from the current cockpit	Choose *Close*. Once you remove the widget, you lose your settings for this widget.
Minimizing a widget	Choose *Minimize*. Only the window bar is displayed for the widget.
Expanding a widget	Choose *Expand*. This menu option is available only when the widget is minimized.
Viewing information about the widget: name, version, and copyright	Choose *About*.

General Widgets

Open Documents

The *Open Documents* widget provides quick access to open documents and enables you to monitor them.

Procedures

Selecting Document Types for Display in the Widget

1. In the widget window bar, click the ⚙ icon.

2. From the dropdown menu, choose *Settings*.

3. In the *Open Documents – Widgets Settings* window, select the document types you want to display in the widget.

4. Do one of the following:

    o To confirm your selections, choose the *OK* button.

    o To cancel your changes, choose the *Cancel* button.

Monitoring and Checking Open Documents

The widget displays the number of currently open documents for each document type, and lets you view and monitor the overall status for each document type.

> ⬆ **Recommendation**
>
> Refresh the widget before viewing the number of open documents to make sure you receive the most up-to-date statistics. For more information about how to refresh the widget, see Adding and Setting Up Your Widgets.

To access the open documents, proceed as follows:

1. Inside the widget, choose the document type with which you want to work.

   A window appears, displaying all the open documents for this document type.

2. In the *Open Items List* window, choose the document you want to open.

The following table shows the open document types defined for each SAP predefined cockpit:

SAP Predefined Cockpit	Document Types Displayed in the *Open Documents* Widget
Sales	• Sales Quotations • Sales Orders • Deliveries • Returns • A/R Down Payments – Unpaid • A/R Down Payments – Not Yet Fully Applied • A/R Invoices • A/R Credit Memos • A/R Reserve Invoices – Unpaid • A/R Reserve Invoices – Not Yet Delivered
Service	• A/R Down Payments – Unpaid • A/R Down Payments – Not Yet Fully Applied • A/R Invoices • A/R Credit Memos • A/R Reserve Invoices – Unpaid • A/R Reserve Invoices – Not Yet Delivered
Finance	• A/R Invoices • Open Service Calls

Common Functions

The *Common Functions* widget enables you to organize and access your most frequently used functionalities. For faster access to your documents, reports, and queries, you can add any SAP Business One menu options and SSP developed menu options to this widget as shortcuts.

To add or remove a menu option for this widget, perform the following procedures:

Procedure

1. To add a menu option for this widget, drag a menu option and drop it in the widget.

2. To remove a menu option from this widget, drag the menu option out of the widget widow, and then drop it.

The following table shows the common functions defined for each SAP predefined cockpit:

SAP Predefined Cockpit	Content of the *Common Functions* Widget
Sales	• Sales Opportunity • Sales Quotation • Sales Order • Delivery • A/R Invoice • Dunning Wizard • Items Master Data • Price Lists • Business Partners Master Data
Service	• Service Call • Customer Equipment Card • Service Contract • Solution Knowledge Base
Finance	• Journal Entry • Journal Voucher • Incoming Payment • Outgoing Payment • Reconciliation • Checks for Payments • A/R Invoice • A/P Invoice • A/R Credit Memo • A/P Credit Memo

Messages and Alerts

The *Messages and Alerts* widget displays messages in a clearer and easier-to-read way.

Example

The following table shows examples of the new messages:

Original Alert Messages	New Alert Messages
Deviation from Credit Limit	BP V70000 exceeds defined credit limit deviation.
Deviation from Commitment Limit	BP V70000 exceeds defined commitment limit deviation.

Original Alert Messages	New Alert Messages
Deviation from % of Gross Profit	Sales Order 82: profit margin less than defined value.
Deviation from Discount (in%)	Sales Order 82 exceeds defined discount deviation.
Deviation from Budget	Accounts exceed defined budget deviation: Office and Building Rent, Office Maintenance,…
Minimum Inventory Deviation	Items below min. inventory level: P10004, S10000,…

To work with this widget, proceed as follows:

Procedure

1. To view the messages in the *Messages and Alerts* widget, add the widget to your cockpit.

2. To view the details of one message, in the widget, double-click the message.

   The *Messages/Alerts Overview* window appears and displays the detailed information of this message.

   o In the *Messages/Alerts Overview* window, you can forward, reply to, and delete messages.

   Note

   After you delete a message in the *Messages/Alerts Overview* window, the message is automatically removed from the *Messages and Alerts* widget

For more information about alerts management, see the online help for SAP Business One.

Browser

The *Browser* widget enables you to embed Web documents by setting up URLs or HTML/DHTML snippets.

Note

You can add more than one *Browser* widget to your cockpit.

To work with this widget, proceed as follows:

Procedure

1. In the widget window bar, click the icon.

2. From the dropdown menu, choose *Settings*.

3. In the *Browser – Widgets Settings* window, in the *URL* field, specify the URL or the HTML/DHTML snippet.

4. Do one of the following:

   o To confirm your change, choose the *OK* button.

   o To cancel your change, choose the *Cancel* button.

5. To restore the URL settings to the SAP default, choose the *Restore* button.

The system restores the URL to **`http://www.sap.com/sme/index.epx`**.

Dashboards

The *Dashboards* widget in the cockpit is just a container. For more information about how to work with dashboards in the SAP Business One integration component, see *Working with Dashboards in the Integration Component configuration and* user guide.

Working with Map Services

Map services enable you to locate business partners and warehouses on maps using external Web browsers. Currently SAP predefines two map services for users:

- Google Map

- Microsoft Bing Map

You can also define other map services, as needed. For more information, see Defining a New Map Service.

Choosing a Map Service

Prerequisites

You have obtained the correct user authorization. For more information, see Authorizations.

Procedure

1. To specify a Web map you want to use, from the SAP Business One *Main Menu*, choose *Administration → System Initialization → General Settings.*

2. Select the *Service* tab.

3. From the *Map Service* dropdown menu list, select the map service you want to use.

   Your choice here does not affect other users' settings. If you want to define other map services, see Defining a New Map Service.

Defining a New Map Service

Note

After you define a new map service, the name of the service appears in the *Map Service* dropdown menu list. The new service is visible and accessible for all users in your company.

Prerequisites

You have obtained the correct user authorization. For more information, see Authorizations.

Procedure

1. To define other map services, from the *Map Service* dropdown menu list, select *Define New.*

   The *Map Services – Setup* window appears.

2. In the *Map Services – Setup* window, specify the name of the map service.

3. In the *Map Services – Setup* window, specify a value in the *Query URL* field.

   A query URL is a URL structure to specify a location search in Web map services. A Query URL uses necessary parameters to extract address data from the SAP Business One database and displays the search results in a Web browser.

   To build a query URL, proceed as follows:

   a. Obtain the base URL structure and the method for adding parameters to the URL.

      Most Web map services providers display the information on their Web sites.

   b. Add parameters to the URL.

To specify your search, you can add parameters to the URL. For example, for the Microsoft Bing Map, the SAP predefined query URL is as follows:

```
http://bing.com/maps/default.aspx?v=2&where1=[Name][AddressName][
Street][Block][City][County][State][Country]
```

The following table shows the parameters you can add to the query URL and the field values each parameter stands for:

Parameter	Corresponding Field
[Name]	*Name* (as in the *Business Partner Master Data* window) *Location* (as in the *Warehouses – Setup* window)
[AddressName]	*Address Name*
[Street]	*Street/PO Box*
[Block]	*Block*
[City]	*City*
[County]	*County*
[State]	*State*
[Country]	*Country*
[Zip]	*Zip Code*

Viewing Locations in a Web Browser

Currently map services enable you to locate business partners and warehouses in maps using external Web browsers.

Prerequisites

- You have specified the address information for the business partner or warehouse you want to locate.

- You have connection to the Internet and have installed a Web browser in your computer.

Procedures

Locating a Business Partner

1. In the *Business Partners Master Data* window, locate the business partner you want to find, and select the *Addresses* tab.

2. Click the *Show Location in Web Browser* link.

   A Web browser appears with the location of the business partner displayed in a Web map.

Locating a Warehouse

1. In the *Warehouses – Setup* window, locate the warehouse you want to find.

2. Click the *Show Location in Web Browser* link.

   A Web browser appears with the location of the warehouse displayed in a Web map.

Looking Up Operations, Master Data, and Documents

After you enable the cockpit, you can use the search box in the upper right corner of the canvas area. The lookup function provides you with quick access to operations, master data, and marketing documents:

- Operation search

  You can locate all the menu options in SAP Business One.

- Data and document search

  You can search for the following data and documents through the lookup function:

  - Business partner master data

  - Item master data

  - Marketing documents

Procedures

Looking Up Operations

1. To search for a menu option, in the search box, enter the name of the operation you want to locate.

   The system filters the operations as you type and displays the results in a floating window.

2. From the result list, choose the operation you want to locate.

Looking Up Data and Documents

1. To search for data and documents, in the search box, enter the relevant information for the data you want to find.

   The following table explains what information you need to enter to search for data and documents:

Looking Up	User Action
Business Partners	Enter the full or partial value for either of the following two fields in the business partner master data: • *Code* • *Name*
Items	Enter the full or partial value for either of the following two fields in the item master data: • *Item Number* • *Description*
Marketing Documents	Enter the full or partial value of the field in the document: • *No*

2. After you specify the correct information, launch the search using either of the following two ways:

    o   On the keyboard, press `Enter`.

    o   Choose the (*Go*) button located to the right of the search box.

    The system displays results in the *Lookup Results* window in three groups:

    o   *Business Partners*

    o   *Items*

    o   *Marketing Documents*

3. To view results from only one group, choose *Show All Results for this Group*.

4. To return to the original *Lookup Results* window, choose *Go Back to All Results*.

5. From the results, select the data or document you want to locate.

Authorizations

Make sure you have the correct authorization for the task you want to perform.

The following table explains the authorizations required for user tasks in the cockpit. For more information about the *General Settings* window and the *Authorizations* window, see the SAP Business One online help.

User Task	User Authorization
Enabling and disabling the cockpit at company level	You are permitted to view the *General Settings* window.
Creating and maintaining the cockpits, including: • Creating a new cockpit template • Publishing a cockpit template • Removing a cockpit template	You require full authorization for the *Cockpit Management*. To assign users with the authorization for the *Cockpit Management*, from the *Authorizations* window, choose *Administration → System Initialization → General Settings → Cockpit & Widget → Cockpit Management.*
Adding and removing a cockpit widget	You require full authorization for the widget. To assign users with the authorization for the cockpit widgets, from the *Authorizations* window, choose *Administration → System Initialization → General Settings → Cockpit & Widget → General Widgets*, and then choose the required widgets.
Viewing the content of a cockpit widget	You require the correct authorization for the content. For example, to view *Open A/R Invoice* in the *Open Documents* widget, you require the authorization for the related finance content.
Specifying a map service	You are permitted to view the *General Settings* window.
Defining a new map service	You require full authorization for the *Map Service*. To assign users with the authorization for the *Map Service*, from the *Authorizations* window, choose *Administration → System Initialization → General Settings → Map Service.*

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