

How-To Guide

SAP Business One, version for SAP HANA
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PUBLIC

How to Work with the Fiori-Style Cockpit

SAP Business One 9.3 PL00 and Later, version for SAP HANA

Typographic Conventions

Type Style	Description
<i>Example</i>	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
Example	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
Example	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE	Keys on the keyboard, for example, F2 or ENTER.

Document History

Version	Date	Change
3.0	2017-07-11	Guide updated for SAP Business One 9.3 PL00, version for SAP HANA. Added content about Fiori-Style cockpit templates. For more information, see Working with Fiori-Style Cockpit Templates .

Table of Contents

1	Introduction.....	6
2	Authorizations for the Fiori-Style Cockpit	7
2.1	Default Authorizations	7
2.1.1	Default Authorizations of Authorization Groups.....	8
2.1.2	Default Authorizations of Users.....	12
3	Enabling and Disabling the Fiori-Style Cockpit.....	13
3.1	Enabling the Fiori-Style Cockpit	13
3.2	Disabling the Fiori-Style Cockpit.....	14
4	Working with the Fiori-Style Cockpit.....	16
4.1	Default Fiori-Style Cockpit Layouts for Authorization Groups.....	16
4.2	Main Menu in the Fiori-Style Cockpit.....	21
4.3	Search Functions in the Fiori-Style Cockpit.....	22
4.3.1	Searching Menus.....	22
4.3.2	Searching Data Using Enterprise Search.....	22
4.4	Customizing the Fiori-Style Cockpit.....	23
4.4.1	Edit Mode.....	24
4.4.2	View Mode.....	25
4.5	Working with Fiori-Style Cockpit Templates.....	25
4.5.1	Creating and Updating a Cockpit Template	25
4.5.2	Publishing and Renaming a Cockpit Template.....	27
4.5.3	Setting a Default Cockpit Template for a User Group	28
5	Working with Widgets in the Fiori-Style Cockpit.....	29
5.1	Adding Widgets to the Fiori-Style Cockpit	30
5.2	Deleting Widgets from the Fiori-Style Cockpit.....	31
5.3	Dashboard.....	31
5.3.1	Predefined Dashboards.....	32
5.3.2	Insight to Action	35
5.4	Key Performance Indicator (KPI).....	35
5.4.1	Predefined KPIs.....	35
5.4.2	Insight to Action	47
5.5	Count	47
5.5.1	Predefined Count Widgets	48
5.5.2	Designing Count Widgets	48
5.5.3	Insight to Action	50
5.6	Workbench.....	52
5.6.1	Predefined Workbenches.....	52
5.6.2	Insight to Action	53
5.6.3	Cross-Widget Actions.....	55
5.7	Browser	57
5.7.1	Predefined Browser Widget	57

5.7.2	Designing Browser Widgets.....	58
5.8	My Recent Updates.....	61
5.8.1	Insight to Action.....	61
5.9	Common Functions	61
5.10	Messages and Alerts.....	62

1 Introduction

The Fiori-style cockpit is a role-based personalized work center for analytics, simplifying users' operations in SAP Business One, version for SAP HANA. It is embedded with the SAP Fiori concept and developed using HTML5. The Fiori-style cockpit provides valuable BI analytics information for users' daily operations and decision-making processes. Users can also have a smooth experience with organizing and using comprehensive system functions in an immediate and visualized way.

The Fiori-style 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

For more information about working with the previous cockpit, see [Working with the Cockpit](#) in the online help documentation.

2 Authorizations for the Fiori-Style Cockpit

The following table explains the authorizations required for user tasks in the Fiori-style cockpit.

User Task	User Authorization
Enabling and disabling the Fiori-style cockpit	You have full authorizations for the <i>General Settings</i> window. To set user authorizations for the <i>General Settings</i> window, from the SAP Business One, version for SAP HANA <i>Main Menu</i> , choose <i>Administration</i> → <i>System Initialization</i> → <i>Authorizations</i> → <i>General Authorizations</i> . In the <i>Authorizations</i> window, select the user for whom you want to set authorizations, and in <i>Administration</i> → <i>System Initialization</i> → <i>General Settings</i> , select <i>Full Authorization</i> .
Adding and viewing a widget in the Fiori-style cockpit	You have full authorizations for the widget. To set user authorizations for the widget, in the <i>Authorizations</i> window, select the user for whom you want to set authorizations, and in <i>Fiori-Style Cockpit Management</i> → <i>Cockpit Contents</i> , or <i>Analytics</i> → <i>Contents</i> , select <i>Full Authorization</i> for the widget to which you want to set authorizations.
Designing a widget, such as a count widget or a KPI, in the Fiori-style cockpit	You have full authorizations for the widget designer. To set authorizations for the widget designer, in the <i>Authorizations</i> window, select the user for whom you want to set authorizations, and in <i>Fiori-Style Cockpit Management</i> → <i>Cockpit Designers</i> , or <i>Analytics</i> → <i>Pervasive Analytics Designer</i> , select <i>Full Authorization</i> for the widget designer to which you want to set authorizations.
Using the Fiori-style cockpit template function	You have full authorizations for the cockpit template. To set authorizations for the cockpit templates, in the <i>Authorizations</i> window, select the user for whom you want to set authorizations, and in <i>Fiori-Style Cockpit Management</i> → <i>Cockpit Management</i> , select <i>Full Authorization</i> .

2.1 Default Authorizations

The authorization for the contents in the Fiori-style cockpit is a combination of the authorizations of the specific user and of the user's authorization group.

2.1.1 Default Authorizations of Authorization Groups

SAP provides a default cockpit layout for each pre-defined authorization group. The default cockpit layout for a user-defined authorization group is empty. The widget gallery contains all the contents for which each authorization group has authorizations. For more information about default Fiori-style cockpit layouts, see [Default Fiori-Style Cockpit Layouts for Authorization Groups](#).

The following table lists the default authorization settings for the contents in the Fiori-style cockpit of each authorization group.

Authorization Group	Authorization for Predefined Contents	Authorization for Newly Created Contents
Finance	<p>Full authorization for the following:</p> <ul style="list-style-type: none"> • KPI: <ul style="list-style-type: none"> ○ Total Assets (CN, DE, GB, US) ○ Total Liabilities (CN, DE, GB, US) ○ Total Equity (CN, DE, GB, US) ○ Net Sales Revenue (CN, DE, GB, US) ○ Net Cash Flow (Operating) (CN, DE, GB, US) ○ Net Cash Flow (Investment) (CN, DE, GB, US) ○ Net Cash Flow (Financial) (CN, DE, GB, US) ○ Cash (CN, DE, GB, US) ○ Accounts Receivable (CN, DE, GB, US) ○ Inventory (CN, DE, GB, US) ○ Accounts Payable (CN, DE, GB, US) ○ COGS (CN, DE, GB, US) ○ Total Current Assets (CN, DE, GB, US) ○ Total Current Liabilities (CN, DE, GB, US) ○ Working Capital (CN, DE, GB, US) ○ DSO (CN, DE, GB, US) ○ DPO (CN, DE, GB, US) ○ DIO (CN, DE, GB, US) ○ CCC (CN, DE, GB, US) ○ OC (CN, DE, GB, US) ○ Asset Turnover (CN, DE, GB, US) ○ Inventory Turnover (CN, DE, GB, US) ○ Gearing Ratio (CN, DE, GB, US) ○ Current Ratio (CN, DE, GB, US) ○ Quick Ratio (CN, DE, GB, US) ○ Debt Ratio (CN, DE, GB, US) ○ Cash Ratio (By Revenue) (CN, DE, GB, US) ○ Gross Profit (CN, DE, GB, US) ○ Gross Profit Margin (CN, DE, GB, US) ○ Operating Cost (DE, GB, US) ○ Expense 1 (DE, GB, US) ○ Expense 2 (DE, GB, US) ○ Operating Income (CN, DE, GB, US) ○ Net Profit (CN, DE, GB, US) 	No authorization for newly-created contents

Authorization Group	Authorization for Predefined Contents	Authorization for Newly Created Contents
	<ul style="list-style-type: none"> ○ Net Profit Margin (CN, DE, GB, US) ○ Operating Margin (CN, DE, GB, US) ○ Cash Ratio (By Profit) (CN, DE, GB, US) ○ ROE (CN, DE, GB, US) ○ Net Cash Flow (CN, DE, GB, US) ○ Receivables Overdue ○ Payables Overdue ● Pervasive Dashboard: <ul style="list-style-type: none"> ○ Aging of Receivables Overdue (10-Day Interval) ○ Aging of Payables Overdue (10-Day Interval) ○ Top 5 Customers by Receivables Overdue ○ Top 5 Vendors by Payables Overdue ● Count Widget: <ul style="list-style-type: none"> ○ My Open A/R Invoices ○ My Open A/P Invoices ● My Workbench: <ul style="list-style-type: none"> ○ Financial Process ● My Recent Updates ● Common Functions ● Messages and Alerts 	
Sales	<p>Full authorization for the following:</p> <ul style="list-style-type: none"> ● KPI: <ul style="list-style-type: none"> ○ Total Sales Amount ○ Sales Return Amount ○ Total Receivable Amount ○ Gross Profit Margin (CN, DE, GB, US) ○ Gross Profit (CN, DE, GB, US) ○ DSO (CN, DE, GB, US) ○ Accounts Receivable (CN, DE, GB, US) ○ Net Sales Revenue (CN, DE, GB, US) ● Pervasive Dashboard: <ul style="list-style-type: none"> ○ Top 5 Best Sellers by Sales Amount ○ Top 5 Customers by Sales Amount ○ Revenue Versus Gross Profit for Last 6 Months ● Count Widget: <ul style="list-style-type: none"> ○ My Sales Orders Not Delivered ○ My Open A/R Invoices ● My Workbench: 	No authorization for newly created contents

Authorization Group	Authorization for Predefined Contents	Authorization for Newly Created Contents
	<ul style="list-style-type: none"> ○ Sales Process ● My Recent Updates ● Common Functions ● Messages and Alerts 	
Purchase	<p>Full authorization for the following:</p> <ul style="list-style-type: none"> ● KPI: <ul style="list-style-type: none"> ○ Total Purchase Amount ○ Goods Return Amount ○ Total Payable Amount ○ GRPO Not Invoiced ○ DPO (CN, DE, GB, US) ○ COGS (CN, DE, GB, US) ○ Accounts Payable (CN, DE, GB, US) ● Pervasive Dashboard: <ul style="list-style-type: none"> ○ Top 5 Purchased Items by Purchase Amount ○ Top 5 Vendors by Purchase Amount ○ Total Purchase Versus Goods Return for Last 6 Months ● Count Widget: <ul style="list-style-type: none"> ○ My Purchase Orders Not Received ○ My Open A/P Invoices ● My Workbench: <ul style="list-style-type: none"> ○ Purchasing Process ● My Recent Updates ● Common Functions ● Messages and Alerts 	No authorization for newly created contents
Inventory	<p>Full authorization for the following:</p> <ul style="list-style-type: none"> ● KPI: <ul style="list-style-type: none"> ○ Inventory Value ○ Inbound Inventory Value ○ Outbound Inventory Value ○ Inventory Turnover (Year) ● Pervasive Dashboard: <ul style="list-style-type: none"> ○ Top 5 Item Groups by Inventory Value ○ Inv. Turnover of Last 12 Months (6-Month Comp.) ○ Inventory Turnover (By Item Group) ○ Inventory Turnover (By Warehouse) ● Count Widget: 	No authorization for newly created contents

Authorization Group	Authorization for Predefined Contents	Authorization for Newly Created Contents
	<ul style="list-style-type: none"> ○ My Open Inv. Transfer Requests ● My Workbench: <ul style="list-style-type: none"> ○ Inventory Management Process ● My Recent Updates ● Common Functions ● Messages and Alerts 	

i Note

The predefined KPIs in the four localizations (CN, DE, GB, US) are available for the following charts of accounts:

Chart of Accounts	Local Settings
<i>M - 股份有限公司会计制度</i>	China
<i>C - US_CoA</i>	United States Of America/Puerto Rico
<i>N - SKR03</i>	Germany
<i>G - GB_CoA</i>	United Kingdom/Ireland

2.1.2 Default Authorizations of Users

By default, users that are not superusers have no authorization for all predefined contents in the Fiori-style cockpit.

By default, users have full authorization for all new contents in the Fiori-style cockpit created by them.

By default, superusers have full authorization for all contents in the Fiori-style cockpit.

3 Enabling and Disabling the Fiori-Style Cockpit

i Note

When the Fiori-style cockpit is enabled, the default skin style will be *Fiori*, and cannot be changed. You can find the default skin style in the *Skin Style* field in *Administration* → *System Initialization* → *General Settings* → *Display*.

The Fiori-style cockpit is enabled by default as of SAP Business One 9.1, version for SAP HANA.

3.1 Enabling the Fiori-Style Cockpit

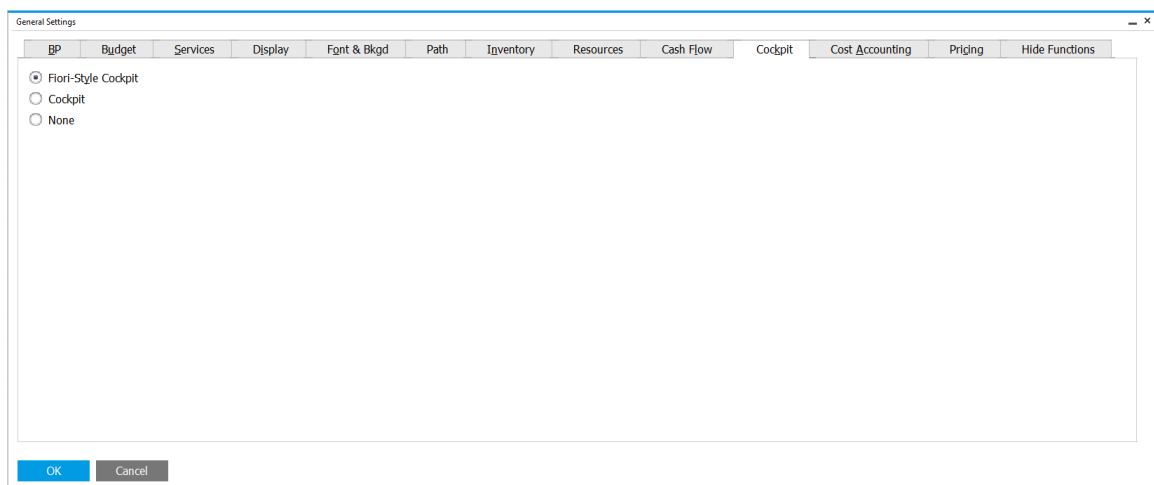
Prerequisite

You have full authorization for the *General Settings* window. To set user authorizations for the *General Settings* window, from the SAP Business One, version for SAP HANA *Main Menu*, choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*. In the *Authorizations* window, select the user for whom you want to set authorizations, and in *Administration* → *System Initialization* → *General Settings*, select *Full Authorization*.

Procedure

Follow the procedure below to enable the Fiori-style cockpit:

1. From the SAP Business One, version for SAP HANA *Main Menu*, choose *Administration* → *System Initialization* → *General Settings*. The *General Settings* window appears.



2. On the *Cockpit* tab, select the *Fiori-Style Cockpit* radio button.
3. Choose the *Update* button.

The setting takes effect the next time you log on to SAP Business One, version for SAP HANA.

3.2 Disabling the Fiori-Style Cockpit

If you want to use the traditional SAP Business One, version for SAP HANA user interface, you can disable the Fiori-style cockpit.

An authorized user can disable the Fiori-style cockpit for the whole company. This prevents all the users in the company from viewing or accessing the Fiori-style cockpit.

Note

After you disable the Fiori-style cockpit, other users can still work with the cockpit until their next logon.

Prerequisite

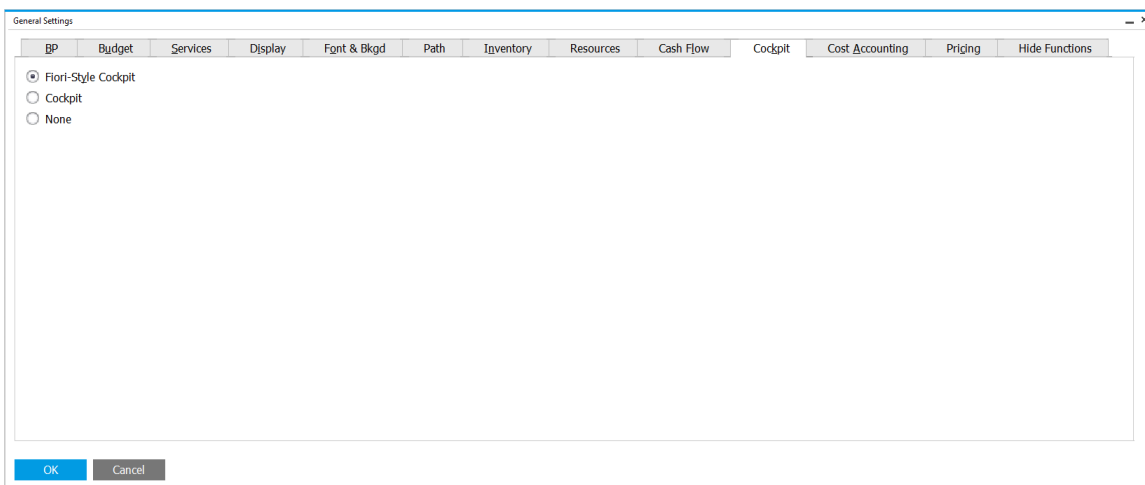
You have full authorization for the *General Settings* window. To set user authorizations for the *General Settings* window, from the SAP Business One, version for SAP HANA *Main Menu*, choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*. In the *Authorizations* window, select the user for whom you want to set authorizations, and in *Administration* → *System Initialization* → *General Settings*, select *Full Authorization*.

Procedure

Follow the procedure below to disable the Fiori-style cockpit:

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

The *General Settings* window appears.



-
2. On the *Cockpit* tab, select the *Cockpit* or *None* radio button.
 3. Choose the *Update* button.

The setting takes effect the next time you log on to SAP Business One, version for SAP HANA.

4 Working with the Fiori-Style Cockpit

You can work with the SAP predefined cockpit layout or customize your own cockpit layout. SAP provides the following predefined Fiori-style cockpit layout for each authorization group, respectively:

- Finance
- Sales
- Purchase
- Inventory

For each of the SAP predefined Fiori-style cockpit layouts, SAP defines the cockpit widgets and widget settings according to the job role each authorization group addresses.

Prerequisite

You have installed the app framework for SAP Business One, version for SAP HANA. For more information about installing the app framework, look for the [Working with App Framework for SAP Business One, version for SAP HANA](#) guide on sappartneredge.com.

4.1 Default Fiori-Style Cockpit Layouts for Authorization Groups

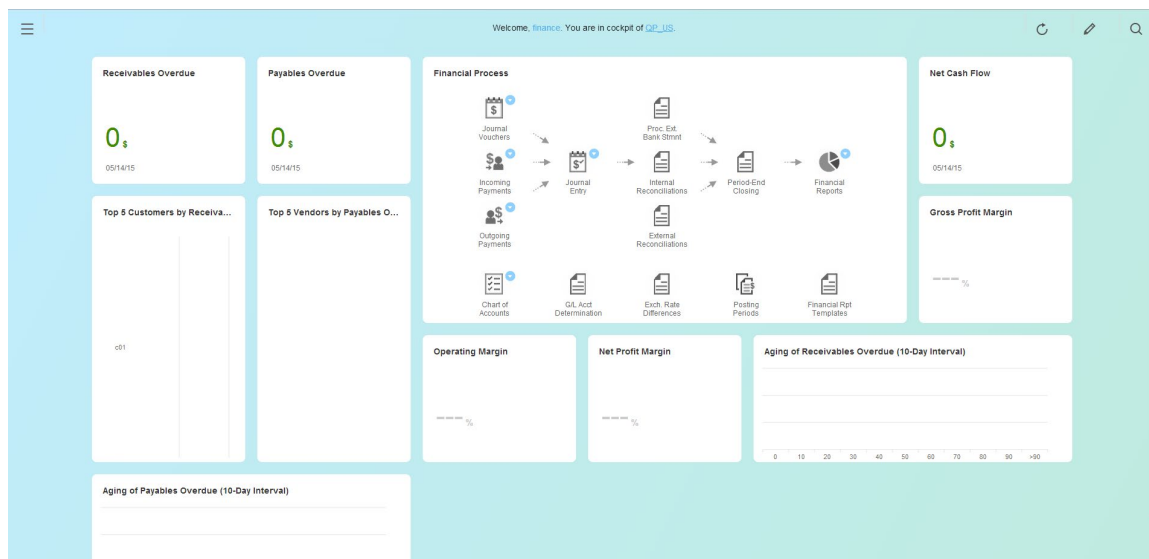
Note

The predefined KPIs in the four localizations (CN, DE, GB, US) are available for the following charts of accounts:

Chart of Accounts	Local Settings
M - 股份有限公司会计制度	China
C - US_CoA	United States Of America/Puerto Rico
N - SKR03	Germany
G - GB_CoA	United Kingdom/Ireland

Finance Authorization Group

This is the default Fiori-style cockpit for the *Finance* authorization group in localizations CN, DE, GB, and US.

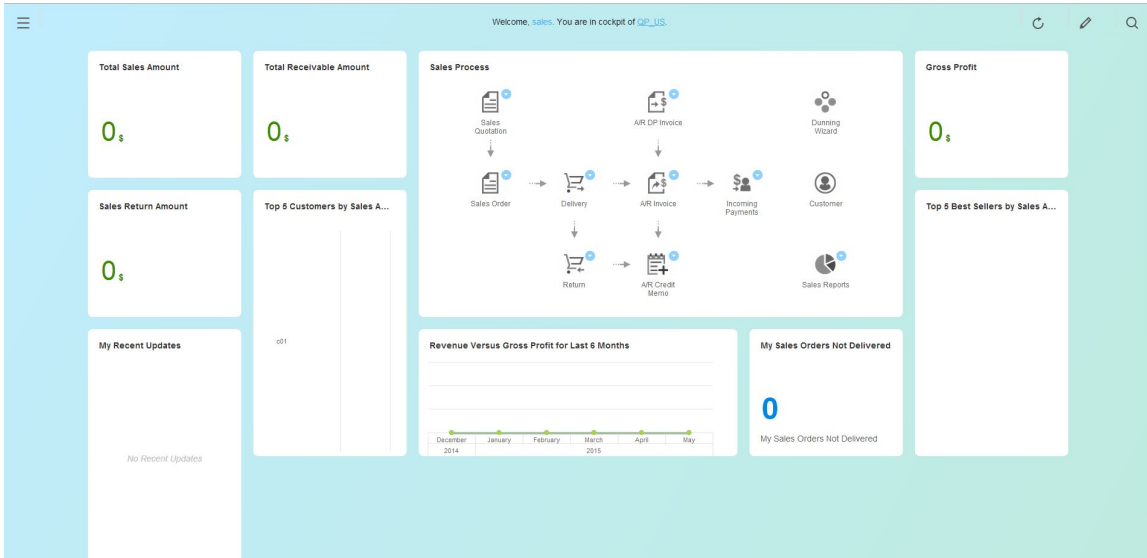


It contains the following widgets:

- *Aging of Receivables Overdue (10-Day Interval)* (pervasive dashboard)
- *Aging of Payables Overdue (10-Day Interval)* (pervasive dashboard)
- *Top 5 Customers by Receivables Overdue* (pervasive dashboard)
- *Top 5 Vendors by Payables Overdue* (pervasive dashboard)
- *Gross Profit Margin* (KPI) (CN, DE, GB, US)
- *Net Profit Margin* (KPI) (CN, DE, GB, US)
- *Operating Margin* (KPI) (CN, DE, GB, US)
- *Net Cash Flow* (KPI) (CN, DE, GB, US)
- *Receivables Overdue* (KPI)
- *Payables Overdue* (KPI)
- *Financial Process* (workbench)

Sales Authorization Group

This is the default Fiori-style cockpit for the *Sales* authorization group in localizations CN, DE, GB, and US.

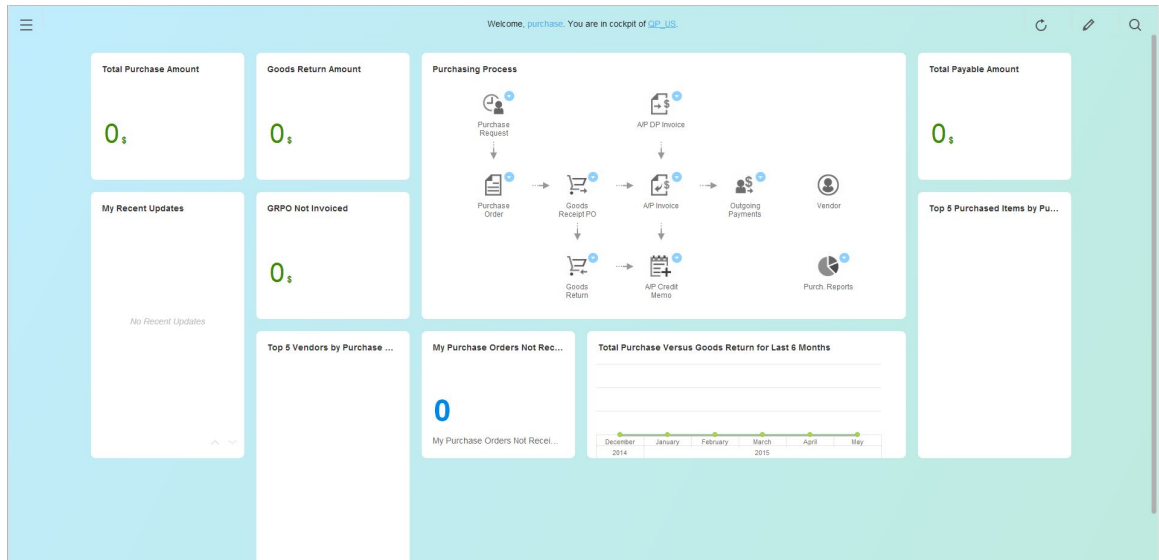


It contains the following widgets:

- *Top 5 Best Sellers by Sales Amount* (pervasive dashboard)
- *Top 5 Customers by Sales Amount* (pervasive dashboard)
- *Revenue Versus Gross Profit for Last 6 Months* (pervasive dashboard)
- *Gross Profit* (KPI) (CN, DE, GB, US)
- *Total Sales Amount* (KPI)
- *Sales Return Amount* (KPI)
- *Total Receivable Amount* (KPI)
- *My Sales Orders Not Delivered* (count widget)
- *Sales Process* (workbench)
- *My Recent Updates*

Purchase Authorization Group

This is the default Fiori-style cockpit for the *Purchase* authorization group.

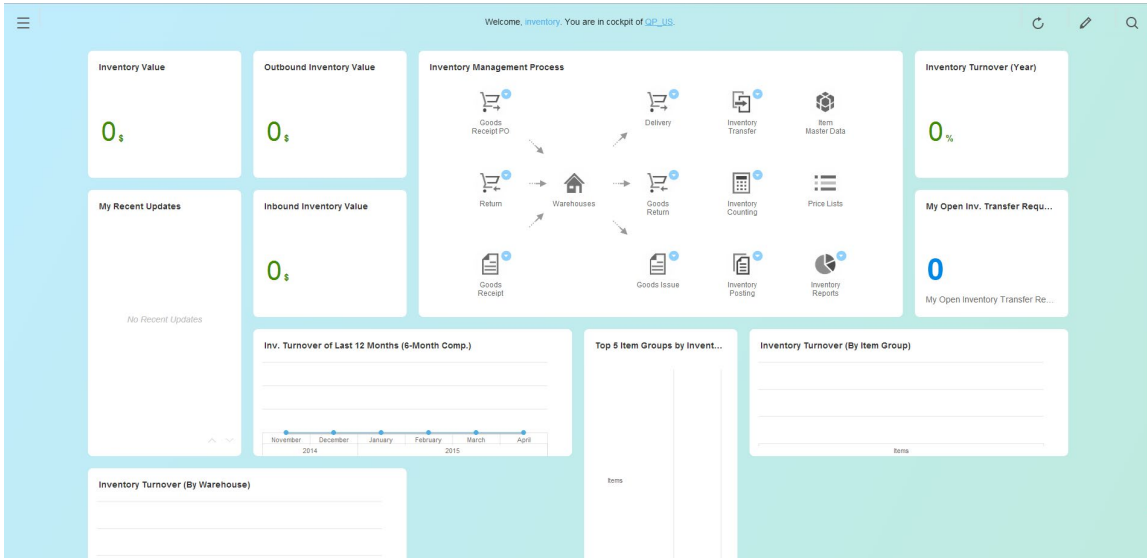


It contains the following widgets:

- *Top 5 Purchased Items by Purchase Amount* (pervasive dashboard)
- *Top 5 Vendors by Purchase Amount* (pervasive dashboard)
- *Total Purchase Versus Goods Return for Last 6 Months* (pervasive dashboard)
- *Total Purchase Amount* (KPI)
- *Goods Return Amount* (KPI)
- *Total Payable Amount* (KPI)
- *GRPO Not Invoiced* (KPI)
- *My Purchase Orders Not Received* (count widget)
- *Purchasing Process* (workbench)
- *My Recent Updates*

Inventory Authorization Group

This is the default Fiori-style cockpit for the *Inventory* authorization group.



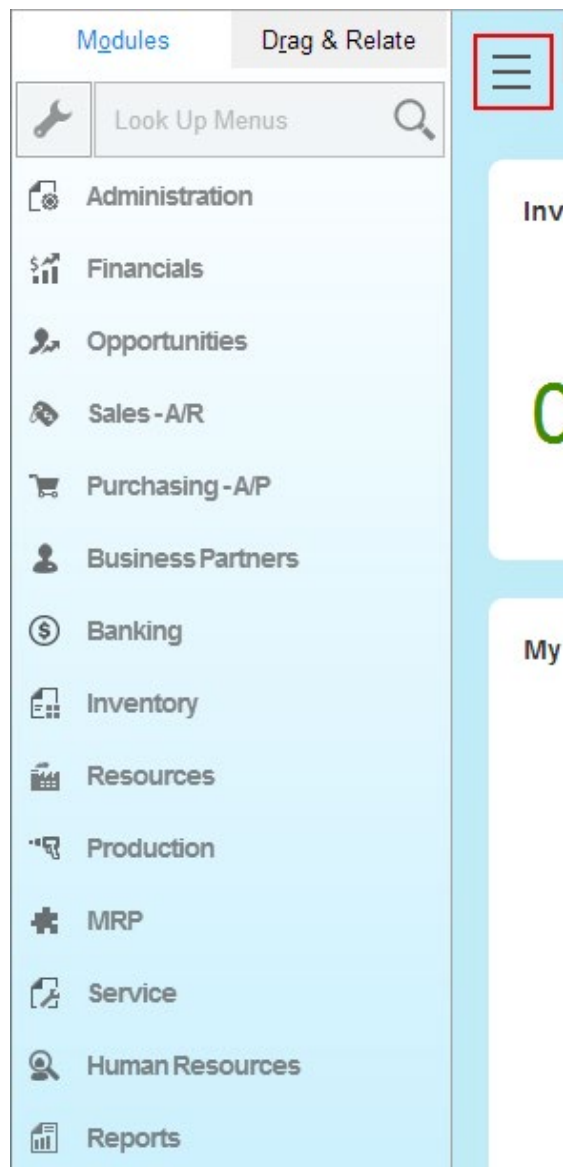
It contains the following widgets:

- *Top 5 Item Groups by Inventory Value* (pervasive dashboard)
- *Inv. Turnover of Last 12 Months (6-Month Comp.)* (pervasive dashboard)
- *Inventory Turnover (By Item Group)* (pervasive dashboard)
- *Inventory Turnover (By Warehouse)* (pervasive dashboard)
- *Inventory Value* (KPI)
- *Inbound Inventory Value* (KPI)
- *Outbound Inventory Value* (KPI)
- *Inventory Turnover (Year)* (KPI)
- *My Open Inv. Transfer Requests* (count widget)
- *Inventory Management Process* (workbench)
- *My Recent Updates*



4.2 Main Menu in the Fiori-Style Cockpit

The *Main Menu* in the Fiori-style cockpit consists of two tabs: the *Modules* tab and the *Drag & Relate* tab. For more information about using the *Main Menu*, see the *SAP Business One Main Menu* section in the online help documentation.

This is the *Main Menu* in the Fiori-style cockpit.



You can perform the following:

- To view the SAP Business One, version for SAP HANA *Main Menu*, in the upper left corner of the Fiori-style cockpit, choose .
- To hide the SAP Business One, version for SAP HANA *Main Menu*, to the upper right of the *Main Menu*, choose .

You can always use the *Modules* tab of the *Main Menu* from the *Modules* command in the menu bar.

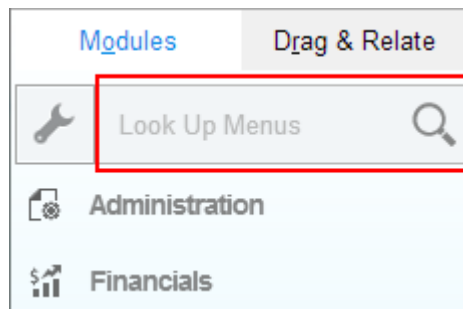
4.3 Search Functions in the Fiori-Style Cockpit

In the Fiori-style cockpit, you can look up menus and data in two separate places.

4.3.1 Searching Menus

SAP Business One, version for SAP HANA lets you search menus using the search bar on the *Modules* tab of the *Main Menu*.

This is the search bar on the *Modules* tab of the *Main Menu*.

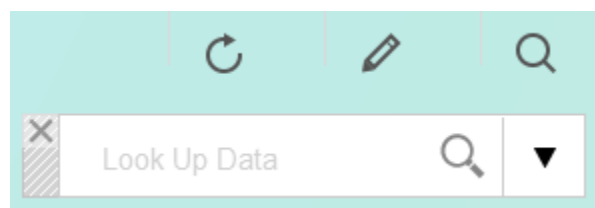


For more information, see [Searching Menus](#) in the online help documentation.



4.3.2 Searching Data Using Enterprise Search

SAP Business One, version for SAP HANA lets you search data using the search box in the upper right corner of the Fiori-style cockpit.

This is the search box in the upper right corner of the Fiori-style cockpit.



You can perform the following:

- To access the search box, in the upper right corner of the Fiori-style cockpit, choose . The search box will always appear at the top of the Fiori-style cockpit. You can move it to anywhere by dragging the gray area to the left of the search box.
- To search for data, in the search box, enter your search query and choose . The *Search Result* window appears. For more information about the *Search Result* window, see [Using the Advanced Options of Enterprise Search](#) in the online help documentation.

-
- To create a search template, follow the procedure below:
 1. In the upper right corner of the *Search Result* window, choose ☆.
 2. In the *Search Template* window, specify the template name, and choose *Save*.


The star in the upper right corner of the *Search Result* window turns yellow (★).
 - To use a search template, beside the search box, choose ▼, and on the *Template* tab, choose the search template that you want to use.
 - To rename or delete a search template, beside the search box, choose ▼, and on the *Template* tab, rename it using ✎, or delete it using ✕.
 - To view or use the search history, beside the search box, choose ▼, and on the *History* tab, view the search history or use a specific search query.

A search query with 📄 indicates that this search was performed using a search template.
 - To work with UDO and UDF customization, beside the search box, choose ▼, and on the ⚙️ tab, perform the required actions. For more information, see *Working with UDO and UDF Customization* in the online help documentation.
 - To close the search box, to the upper left of the search box, choose ✕.


4.4 Customizing the Fiori-Style Cockpit

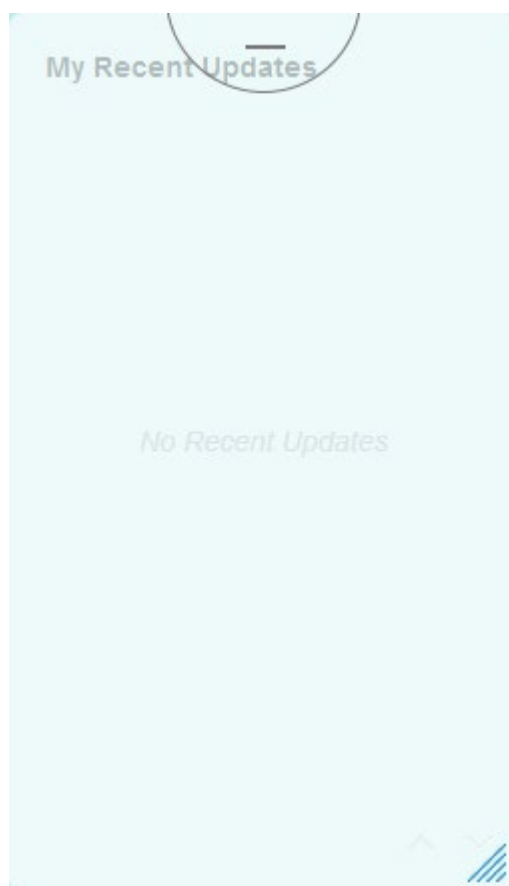
You can perform different actions to customize your own Fiori-style cockpit layout in the following two modes. For more information about setting up actions for the pervasive dashboard and KPI widgets, look for the [How to Work with Pervasive Analytics](#) guide on sappartneredge.com.


4.4.1 Edit Mode

In the Fiori-style cockpit, when you choose  in the upper right corner, the cockpit switches to edit mode.

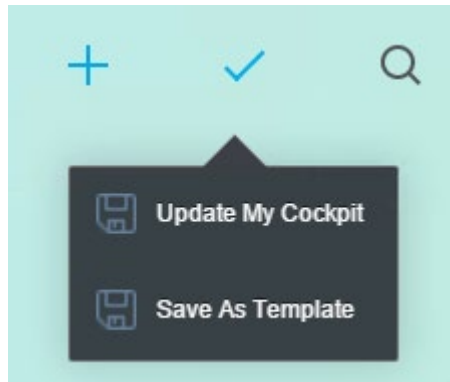
In the edit mode of the Fiori-style cockpit, you can perform the following:

- To add a widget, click  in the middle of the cockpit (if the cockpit is empty) or in the upper right corner of the cockpit (if the cockpit has contents). For more information, see [Adding Widgets to the Fiori-Style Cockpit](#).
- To delete a widget, select the widget that you want to delete and drag it to the red area in the lower right corner.
- To change the place of a widget, select the widget that you want to move and drag it to the place that you prefer.
- For a pervasive dashboard or my recent updates, to change its size, around the pervasive dashboard or my recent updates, choose the minus or plus sign.




- To finish your customization and return to the view mode of the Fiori-style cockpit, in the upper right corner, choose . Two options appear in the drop-down list:
 - Update My Cockpit
 - Save As Template


To save the customization result after editing to your own cockpit, select *Update My Cockpit*. To save the result as a new template, select *Save As Template*. Enter a name for the template, and then save it.





i Note

Only users that have the authorization to Cockpit Management can see the two options. If a user is not authorized, then choosing  leads to saving the cockpit.

4.4.2 View Mode

In the Fiori-style cockpit, when you choose  in the upper right corner and finish updating a cockpit, the cockpit switches to view mode.

In the view mode of the Fiori-style cockpit, you can perform the following:

- To refresh the data, in the upper right corner of the Fiori-style cockpit, choose .
- To perform actions defined for a pervasive dashboard, right-click the data for a dimension, and choose the action.
- To perform an action defined for a KPI, click anywhere on the KPI.
- To perform various actions for count widgets, workbenches, or my recent updates, click the relevant widgets.
- To edit the Fiori-style cockpit, in the upper right corner, choose .

4.5 Working with Fiori-Style Cockpit Templates

Besides system default cockpits, the Fiori-style cockpit allows you to publish a customized cockpit template for users in your company to use, or keep unpublished templates for your own use. (The "Cockpit Template" mentioned in this document below all refers to the "Fiori-style cockpit template".)

4.5.1 Creating and Updating a Cockpit Template

You can either create a Fiori-style cockpit from scratch, or edit the existing cockpit and save it as a template.

4.5.1.1 Creating a Cockpit Template from Scratch

Procedure

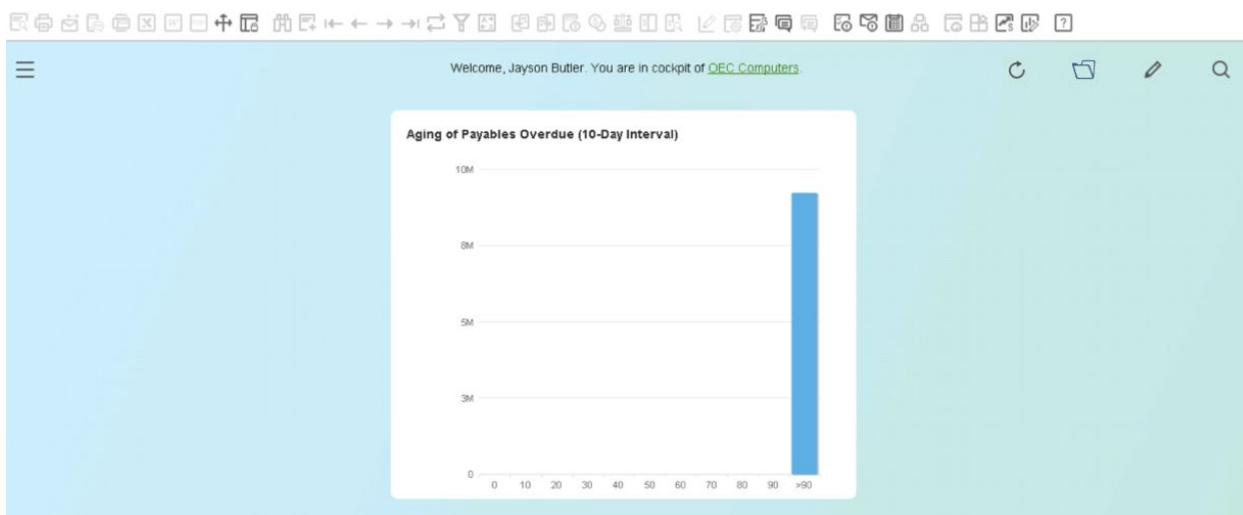
1. From the SAP Business One, version for SAP HANA *Main Menu*, choose *Tools* → *Cockpit* → *Cockpit Management*. The *Cockpit Management - Setup* window appears. You can find all the system default cockpit templates, published templates created by users in your company, and your own templates that haven't been published.
2. In the *Cockpit Management - Setup* window, add a name and description for the new template you want to create.
3. Choose *Update*.

After creation, it appears in the list of cockpit templates. Before the template is published, it is only visible to your own account.

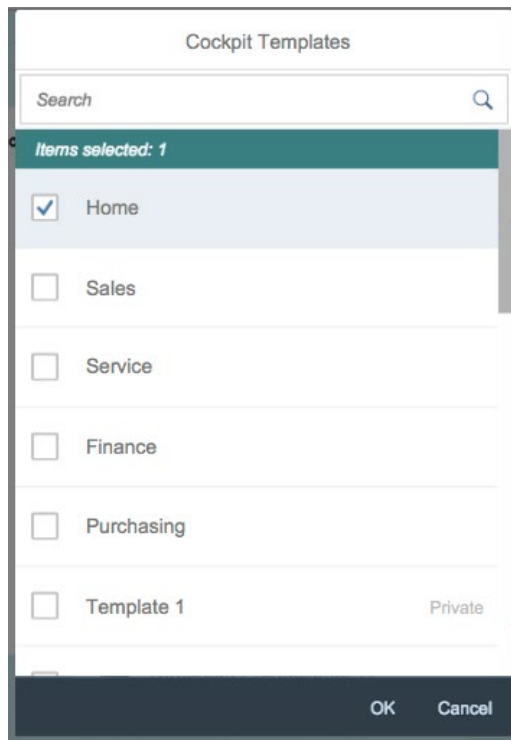
4.5.1.2 Updating a Cockpit Template or a Cockpit Based on a Template

To view existing cockpit templates and choose one to update and save as a new template, follow the steps below:

1. In the Fiori-style cockpit, choose  to open the template list.



- From the displayed *Cockpit Templates* window, choose one or several templates for editing. If you choose several templates, then all the widgets in the chosen templates will merge into one cockpit in the editing mode.



- Edit the cockpit widgets following the information provided above in Chapter 4.4.1. To save the customization result after editing to your own cockpit, choose and then select *Update My Cockpit*. To save the result as a new template, choose and then select *Save as Template*. Enter a name for the template and save it.

i Note

Only users that have the authorization to Cockpit Management can see the two options. If a user is not authorized, then choosing leads to saving the cockpit.

4.5.2 Publishing and Renaming a Cockpit Template

You can publish and rename a cockpit template if you have the authorization to *Cockpit Management*.

To publish a template, do the following steps:

- From the SAP Business One, version for SAP HANA *Menu Bar*, choose *Tools* → *Cockpit* → *Cockpit Management*,
- Click the number of the template you want to publish.
- Choose *Publish*.

To rename an existing template, in the above-mentioned Cockpit Management window, change the name and then choose *Update*.

Note

Published templates cannot have identical names with each other.

4.5.3 Setting a Default Cockpit Template for a User Group

A power user can set a cockpit template as default template for a certain user group. A user that belongs to this group will see the content in their cockpit the same with the default template for the first time when they log on to SAP Business One.

Note

If a user belongs to multiple user groups, then the cockpit at their first logon to SAP Business One displays all the widgets included in the default cockpit templates of the user groups to which they belong.

To set a default cockpit template for a user group, do the following steps:

1. From the SAP Business One, version for SAP HANA *Main Menu*, choose *Administration* → *Setup* → *General* → *Users Groups*.
2. In the displayed window, select a user group, and then choose a default cockpit template for this group.
3. Choose *OK*.

Note

One user group can have one default template only. If a new template is assigned, then it will replace the previous one.



5 Working with Widgets in the Fiori-Style Cockpit

After you successfully enable the Fiori-style cockpit, your cockpit appears and displays the widgets you added. SAP delivers the following seven widgets to help users build up and maintain their personalized work space:



- **Dashboard:** a crystal or pervasive dashboard presents easy-to-understand visualizations of transactional data from the SAP HANA database. You can design your own pervasive dashboard using the pervasive analytics designer. For more information, look for the *How to Work with Pervasive Analytics* guide on sappartneredge.com.
- **Key Performance Indicator (KPI):** a KPI is a quantifiable measurement used to define and evaluate progress towards an organization's goals. You can design your own KPI using the pervasive analytics designer. For more information, look for the *How to Work with Pervasive Analytics* guide on sappartneredge.com.
- **Count:** a count widget displays the number of results of a user-defined query. You can design your own count widget in SAP Business One, version for SAP HANA. For more information, see [Designing Count Widgets](#).
- **Workbench:** a workbench is a common and standardized business process.
- **My Recent Updates:** this widget provides a maximum of 20 links to your newly added or updated objects.
- **Common Functions:** this widget enables you to organize and access your most frequently used functionalities.
- **Messages and Alerts:** this widget displays messages in a clearer and easier-to-read way.

5.1 Adding Widgets to the Fiori-Style Cockpit

Procedure

1. In the upper right corner of the Fiori-style cockpit, choose .
The cockpit switches to edit mode.
2. In the upper right corner of the Fiori-style cockpit, choose .
The *Widget Gallery* appears, displaying all the widgets for which you have authorization.
The widgets display a picture instead of real data to distinguish them from widgets of other categories.




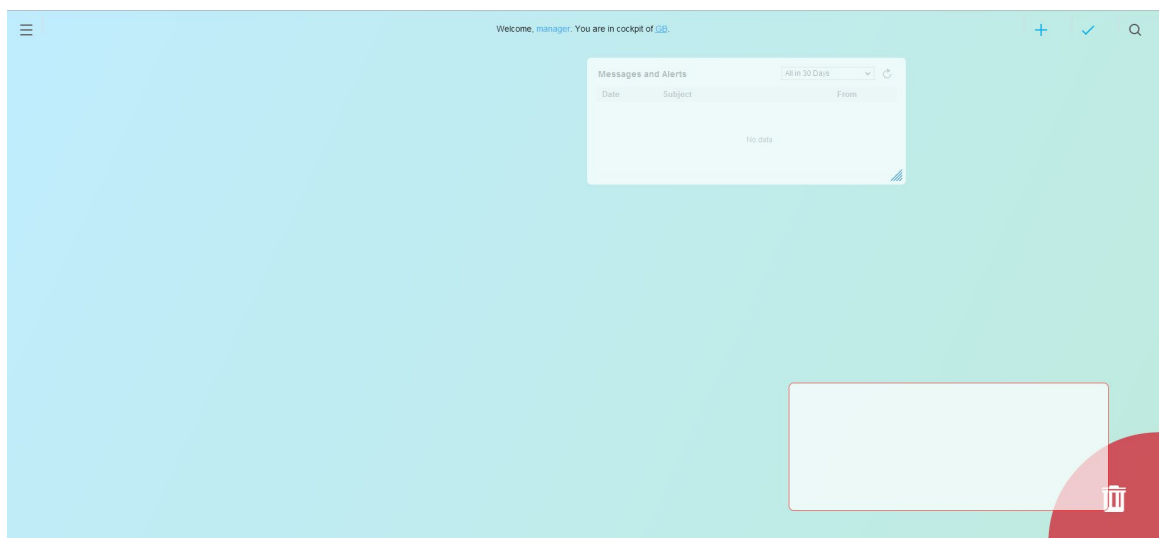
3. In the widget gallery, select the widgets that you want to add to the Fiori-style cockpit.
To find a widget in a specific category, in the upper left corner of the widget gallery, select the category that you want to explore.
To find a specific widget, in the upper right corner of the widget gallery, enter the widget name or part of the name to search for the widget.
To delete a widget from the Fiori-style cockpit, deselect the widget.
4. After you select the widgets, in the upper left corner of the widget gallery, choose .
The widgets appear in the Fiori-style cockpit in edit mode.
5. [Optional] To change the display place of a widget, select the widget that you want to move, and drag it to the place that you prefer.
6. [Optional] To change the size of a widget, around the widget, choose the minus or plus sign.
7. To confirm the widget settings, in the upper right corner, choose .


5.2 Deleting Widgets from the Fiori-Style Cockpit

You can delete widgets in the widget gallery by deselecting the widgets. For more information about the widget gallery, see [Adding Widgets to the Fiori-Style Cockpit](#).

Procedure

1. In the upper right corner of the Fiori-style cockpit, choose .
The cockpit switches to edit mode.
2. Select the widget that you want to delete and drag it to the red area in the lower right corner.



3. To confirm the widget settings, in the upper right corner, choose .

5.3 Dashboard

In the Fiori-style cockpit, you can work with both crystal dashboards and pervasive dashboards.

Dashboards are an element of the cockpit; they present easy-to-understand visualizations, such as bar or pie charts, of transactional data from the SAP HANA database.

You can design your own pervasive dashboard using the pervasive analytics designer. For more information, look for the [How to Work with Pervasive Analytics](#) guide on sappartneredge.com.

You can create crystal dashboards for SAP Business One, version for SAP HANA using SAP Crystal Dashboard Design. For more information, look for the [How to Develop Your Own Dashboards](#) guide on sappartneredge.com.

5.3.1 Predefined Dashboards

SAP provides the following predefined pervasive dashboards.

Note

To see a specific query, in the menu bar, choose *Tools* → *Queries* → *Query Manager*. For more information about the query manager, see *Query Manager* in the online help documentation.

Pervasive Dashboard	Description	Data Source
<i>Aging of Payables Overdue (10-Day Interval)</i>	Vendor liabilities aging	User-defined query <i>Aging of Payables Overdue (10-Day Interval)</i>
<i>Aging of Receivables Overdue (10-Day Interval)</i>	Customer receivables aging	User-defined query <i>Aging of Receivables Overdue (10-Day Interval)</i>
<i>Aging of Receivables Overdue (30-Day Interval)</i>	Customer receivables aging	User-defined query <i>Aging or Receivables Overdue (30-Day Interval)</i>
<i>Avg. Ord. Fulfillment Days by Cust. (Last 6 Mo.)</i>	<p>The total of the following: Average number of days it takes to deliver products since the sales order is created for each business partner.</p> <p>This dashboard covers sales orders within this and the last five months according to their document dates. Fulfillment days per sales order = posting date of delivery - posting date of sales order</p>	User-defined query <i>Monthly Average Fulfillment Days of Sales Orders by Customers</i>
<i>Inv. Turnover of Last 12 Months (6-Month Comp.)</i>	Inventory turnover	User-defined query <i>Inventory Turnover</i>
<i>Inventory Turnover (By Item Group)</i>	Inventory turnover statistics by item group	User-defined query <i>Inventory Turnover (By Item Group)</i>
<i>Inventory Turnover (By Warehouse)</i>	Inventory turnover statistics by warehouse	User-defined query <i>Inventory Turnover (By Warehouse)</i>
<i>On-Time Delivery Rate by No. by Cust. (Last 6 Mo.)</i>	<p>The total of the following: The result of the number of on-time delivered sales orders divided by the number of all delivered sales orders to each business partner.</p> <p>This dashboard covers sales orders within this and the last five months according to their document dates. The deliveries whose posting dates are earlier than or equal to the posting dates of sales orders are considered as on-time deliveries.</p>	User-defined query <i>Monthly On-Time Delivery Rate by Number of Orders by Customers</i>

Pervasive Dashboard	Description	Data Source
<i>Potential Amt of Open Oppty by Stages - Curr. User</i>	Potential amount of all open opportunities of the currently logged-on sales employee displayed by stages. In the SAP Business One Sales app, this dashboard appears by default when you tap the <i>Potential Amt of Open Opportunities - Curr. User</i> KPI in the KPI screen.	User-defined query <i>Opportunity</i>
<i>Revenue Versus Gross Profit for Last 6 Months</i>	Comparison of revenue and gross profit	User-defined query <i>Revenue Versus Gross Profit for Last 6 Months</i>
<i>Revenue Versus Gross Profit for Last 6 Years</i>	Comparison of net sales amount and gross profit in this and the last five years	Calculation view <i>Profitability Analysis</i>
<i>Sales Order Amount by Mo./Qtr/Yr (LC) - Curr. User</i>	The total sales order amount of the currently logged-on sales employee displayed by months. In the SAP Business One Sales app, this dashboard appears by default when you tap the <i>Sales Order Amount of This Month (LC) - Curr. User</i> KPI in the KPI screen, and can be displayed by months, quarters, or years.	User-defined query <i>Sales Order</i>
<i>Sales Order Amount by Months (LC)</i>	The total sales order amount displayed by months. In the SAP Business One Sales app, this dashboard appears on the <i>General</i> tab of customers by default, and displays the total sales order amount of the specific customer by months, quarters, or years.	User-defined query <i>Sales Order</i>
<i>Top 5 Best Selling Items by Sales Amount</i>	Items ranked by sales amount based on invoices	User-defined query <i>Best Sellers by Sales Amount</i>
<i>Top 5 Best Selling Items by Sales Amount (Mobile)</i>	Items ranked by sales amount based on invoices. In the SAP Business One Sales app, this dashboard appears on the <i>General</i> tab of customers by default, and displays the items ranked by sales amount based on the invoices of the specific customer.	User-defined query <i>Sales Invoice</i>
<i>Top 5 Best Selling Items by Sales Amt - Curr. User</i>	Items ranked by sales amount based on the invoices of the currently logged-on sales employee. In the SAP Business One Sales app, this dashboard appears in the KPI screen by default.	User-defined query <i>Sales Invoice</i>
<i>Top 5 Best Selling Items by Sales Amt of This Year</i>	Items ranked by sales amount based on invoices in this year	Calculation view <i>Profitability Analysis</i>
<i>Top 5 Customers by Receivables Overdue</i>	Customers ranked by receivables overdue	User-defined query <i>Customers by Receivables Overdue</i>

Pervasive Dashboard	Description	Data Source
<i>Top 5 Customers by Sales Amount</i>	Customers ranked by sales amount based on invoices	User-defined query <i>Customers by Sales Amount</i>
<i>Top 5 Customers by Sales Amount - Curr. User</i>	Customers ranked by sales amount based on the invoices of the currently logged-on sales employee. In the SAP Business One Sales app, this dashboard appears in the KPI screen by default.	User-defined query <i>Sales Invoice</i>
<i>Top 5 Item Groups by Inventory Value</i>	Item groups ranked by item inventory value in the groups	User-defined query <i>Item Groups by Inventory Value</i>
<i>Top 5 Purchased Items by Purchase Amount</i>	Items ranked by purchase amount based on invoices	User-defined query <i>Purchased Items By Purchase Amount</i>
<i>Top 5 Sales Employees by Sales Amount</i>	Sales employees ranked by sales amount based on invoices	Calculation view <i>Profitability Analysis</i>
<i>Top 5 Vendors by Payables Overdue</i>	Vendors ranked by payables overdue	User-defined query <i>Vendors by Payables Overdue</i>
<i>Top 5 Vendors by Purchase Amount</i>	Vendors ranked by purchase amount based on invoices	User-defined query <i>Vendors by Purchase Amount</i>
<i>Total Purchase Versus Goods Return for Last 6 Months</i>	Comparison of purchase amount and goods return	User-defined query <i>Total Purchase Versus Goods Return for Last 6 Months</i>

SAP provides 9 predefined crystal dashboards, listed below. For more information about the crystal dashboards, see *SAP Predefined Dashboards* under *Working with Crystal Dashboards* in the online help documentation.

- *Service Call*
- *Sales Analysis*
- *Cash Flow Forecast*
- *Purchase Quotations*
- *Inventory Status*
- *Delivery Analysis*
- *Sales Employee Performance Target*
- *Payment Collection Analysis*
- *Inventory Counting Recommendation*

5.3.2 Insight to Action

In the view mode of the Fiori-style cockpit, for pervasive dashboards that you have added actions, you can right-click the data and choose defined actions.

For more information about actions in pervasive dashboards, look for the *How to Work with Pervasive Analytics* guide on sappartneredge.com.

5.4 Key Performance Indicator (KPI)

A Key Performance Indicator (KPI) is a quantifiable measurement used to define and evaluate progress towards an organization's goals.

SAP provides 57 predefined KPIs. They can help you monitor your company's financial health in real time. In addition, management can take corresponding adjustments and actions to better achieve the organization's goals.

For more information about designing KPIs, look for the *How to Work with Pervasive Analytics* guide on sappartneredge.com.

5.4.1 Predefined KPIs

Note

The predefined KPIs in the four localizations (CN, DE, GB, US) are available for the following charts of accounts:

Chart of Accounts	Local Settings
M - 股份有限公司会计制度	China
C - US_CoA	United States Of America/Puerto Rico
N - SKR03	Germany
G - GB_CoA	United Kingdom/Ireland

Note

The predefined KPIs in the localization *All* are available for all charts of accounts in all localizations.

KPIs can differ among companies, depending on industries and company goals. The 57 predefined KPIs are the most commonly used ones that reflect a company's financial performances.

You can focus on individual KPIs to measure the performance at a specific requirement. You can also group the KPIs in a certain area to get a whole and comprehensive picture of your company's financial performances.

The predefined KPIs are in the following areas:

- Working capital management:

Working capital is the amount of a company's current assets minus its current liabilities. The working capital ensures that the company is able to carry out its day-to-day operations, as well as to satisfy its maturing short-term debt and the upcoming operational expenses.

The following predefined KPIs help you measure and monitor your company's working capital:

- Accounts Payable (CN, DE, GB, US)
- Accounts Receivable (CN, DE, GB, US)
- Cash (CN, DE, GB, US)
- CCC (CN, DE, GB, US)
- Customer Balance (LC)
- DIO (CN, DE, GB, US)
- DPO (CN, DE, GB, US)
- DSO (CN, DE, GB, US)
- Inventory (CN, DE, GB, US)
- Inventory Turnover (CN, DE, GB, US)
- Inventory Turnover (Year)
- OC (CN, DE, GB, US)
- Total Amount of Open Deliveries (LC)
- Working Capital (CN, DE, GB, US)

- Profitability ratios:

Profitability measures a company's ability to generate earnings considering sales, assets and equity. It highlights a company's efficiency for gaining profits. It is important to company owners and investors.

The following predefined KPIs help you define and measure your company's profitability:

- Asset Turnover (CN, DE, GB, US)
- Gearing Ratio (CN, DE, GB, US)
- Gross Profit (CN, DE, GB, US)
- Gross Profit (LTD)
- Gross Profit (YTD)
- Gross Profit Margin (CN, DE, GB, US)
- Gross Profit Margin (YTD)
- Net Profit Margin (CN, DE, GB, US)
- Operating Margin (CN, DE, GB, US)
- ROE (CN, DE, GB, US)

- Liquidity ratios:

Liquidity is a company's ability to pay off its short-term debts. It shows the proportion by which the current liabilities are covered by liquid assets. In general, the greater the coverage is, the more likely it is that the company is able to pay the debts when they fall due, and still be able to fund ongoing operations.

The following predefined KPIs reflect your company's liquidity:

- Cash Ratio (By Profit) (CN, DE, GB, US)
 - Cash Ratio (By Revenue) (CN, DE, GB, US)
 - Current Ratio (CN, DE, GB, US)
 - Quick Ratio (CN, DE, GB, US)
- Debt Ratios (CN, DE, GB, US):

Debit ratio is calculated as a company's total debts to its total assets, which quantifies how leveraged a company is. It indicates how much a company relies on the debts to finance its assets.

The higher the debt ratio is, the more risky the operations are; this means that the company needs to bear a higher proportion of cash flow that is generated from operations to pay the interests on its debts.

- Financial statements:

Financial statements are formal records that reflect a company's financial activities and performances in a financial period. The information is presented in a manner that is easy to understand. Typically, the following statements are included:

- Balance Sheet
- Cash Flow Statement
- Profit and Loss Statement

A company needs to prepare and show its financial statements to reveal its financial activities and performances. The public and stakeholders thus can make their financial decisions based on the financial statements.

The following predefined KPIs show the main and important statement items:

- Accounts Payable (CN, DE, GB, US)
- Accounts Receivable (CN, DE, GB, US)
- Cash (CN, DE, GB, US)
- COGS (CN, DE, GB, US)
- Gross Profit (CN, DE, GB, US)
- Inventory (CN, DE, GB, US)
- Net Cash Flow (CN, DE, GB, US)
- Net Cash Flow (Financial) (CN, DE, GB, US)
- Net Cash Flow (Investment) (CN, DE, GB, US)
- Net Cash Flow (Operating) (CN, DE, GB, US)
- Net Profit (CN, DE, GB, US)
- Total Assets (CN, DE, GB, US)
- Total Current Assets (CN, DE, GB, US)
- Total Current Liabilities (CN, DE, GB, US)
- Total Equity (CN, DE, GB, US)
- Total Liabilities (CN, DE, GB, US)

- Daily operation indexes:

The following predefined KPIs help you monitor and evaluate some important parts or aspects of your company's daily operations:

- Expense 1 (DE, GB, US)
- Expense 2 (DE, GB, US)
- Inventory Value
- Operating Cost (DE, GB, US)
- Operating Income (CN, DE, GB, US)

The following predefined KPIs help you monitor and evaluate the important parts or aspects from the sales side:

- Average Delivery Variance Days

- Average Fulfillment Days for a Sales Order
- Net Sales Revenue (CN, DE, GB, US)
- Number of Open Deliveries
- Number of Open Sales Orders
- Number of Open Sales Quotations
- Number of Open Service Calls
- On-Time Delivery Rate
- Open Amount of Deliveries
- Outbound Inventory Value
- Receivables Overdue
- Sales Order Amount of This Month (LC) - Curr. User
- Sales Return Amount
- Sales Return Amount for This Year
- Total Receivable Amount
- Total Receivable Amount (LTD)
- Total Sales Amount
- Total Sales Amount (LTD)
- Total Sales Amount (YTD)

The following predefined KPIs help you monitor and evaluate the important parts or aspects from the purchasing side:

- Average Fulfillment Days for a Purchase Order
- Average Receipt Variance Days
- Goods Return Amount
- GRPO Not Invoiced
- Inbound Inventory Value
- Payables Overdue
- Total Payable Amount
- Total Purchase Amount
- Customer relationship management (CRM):
 - Churn Probability
 - Credit Limit Deviation
 - Opportunity Win Rate (LTD)
 - Potential Amt of Open Opportunities
 - Potential Amt of Open Opportunities - Curr. User
 - Weighted Amount of All Open Opportunities (LC)

For a complete list of predefined KPIs, see the table below.

Note

To see a specific query, in the menu bar, choose [Tools](#) → [Queries](#) → [Query Manager](#). For more information about the query manager, see [Query Manager](#) in the online help documentation.

KPI Name	KPI Description	Data Source	Interim or Not	Localization
Accounts Payable	Accounts payable amount on the current day	Financial KPI factor Accounts Payable (factor 007)	Yes	CN, DE, GB, US
Accounts Receivable	Accounts receivable amount on the current day	Financial KPI factor Accounts Receivables (factor 003)	Yes	CN, DE, GB, US
Asset Turnover	Asset turnover ratio up to today in the current month, reflecting the efficiency of a company's use of its assets in generating net sales revenue to the company	KPI Net Sales Revenue ÷ KPI Total Assets	No	CN, DE, GB, US
Average Delivery Variance Days	Average (YTD) number of days between the posting date of the delivery and the due date of the source sales order. The KPI covers orders within the current year according to their document dates.	Calculation view Statistics of On-Time Delivery	No	All
Average Fulfillment Days for a Purchase Order	Average (YTD) number of days it takes to receive products since the purchase order is created. The KPI covers orders within the current year according to their document dates. Fulfillment days per purchase order = posting date of GRPO - posting date of purchase order	Calculation view Purchase Order Fulfillment Cycle Time Query	No	All
Average Fulfillment Days for a Sales Order	Average (YTD) number of days it takes to deliver products since the sales order is created. The KPI covers orders within the current year according to their document dates. Fulfillment days per sales order = posting date of delivery - posting date of sales order	Calculation view Sales Order Fulfillment Cycle Time Analysis	No	All
Average Receipt Variance Days	Average (YTD) number of days between the posting date of goods receipt PO and the due date of the source purchase order. The KPI covers orders within the current year according to their document dates.	Calculation view Statistics of On-Time Receipt	No	All
Cash	Total amount of cash and monetary capital on the current day	Financial KPI factor Cash (factor 001)	Yes	CN, DE, GB, US

KPI Name	KPI Description	Data Source	Interim or Not	Localization
<i>Cash Ratio (By Profit)</i>	Net cash flow spent on operating activities as a percentage of the net profit gained. The value is up to today in the current month.	KPI <i>Net Cash flow (Operating)</i> ÷ KPI <i>Net Profit</i>	No	CN, DE, GB, US
<i>Cash Ratio (By Revenue)</i>	Net cash flow spent on operating activities as a percentage of the net sales revenue achieved. The value is up to today in the current month.	KPI <i>Net Cash flow (Operating)</i> ÷ KPI <i>Net Sales Revenue</i>	No	CN, DE, GB, US
<i>CCC</i>	Cash conversion cycle up to today in the current month. Cash conversion cycle, the average number of days it takes for a company to convert resource inputs into cash flows	KPI <i>DIO</i> + KPI <i>DSO</i> – KPI <i>DPO</i>	No	CN, DE, GB, US
<i>Churn Probability</i>	Average churn rate of all customers based on sales orders and A/R invoices. In Customer 360, this KPI displays the churn rate of the relevant customer. i Note To view the rate and to update it with the latest data in your company database, in a web browser, navigate to the following URL: https://<Server Address>:<Port>/PredictiveAnalysis , log on to the company you are working with, and define the refresh schedule. The URL supports the following Web browsers: Google Chrome, Microsoft Edge, Apple Safari, and Mozilla Firefox.	Calculation view <i>Customer Churn Query</i>	No	All
<i>COGS</i>	Costs of goods sold up to today in the current month	Financial KPI factor <i>COGS</i> (factor 015)	Yes	CN, DE, GB, US
<i>Credit Limit Deviation</i>	Total of the following of all customers: In the <i>Business Partner Master Data</i> window, <i>Credit Limit</i> on the <i>Payment Terms</i> tab minus <i>Account Balance</i> minus <i>Deliveries</i> minus <i>Orders</i> . In Customer 360, this KPI displays the result for the relevant customer.	User-defined query <i>Credit Limit Deviation</i>	No	All

KPI Name	KPI Description	Data Source	Interim or Not	Localization
<i>Current Ratio</i>	The ratio between the total current assets and total current liabilities of a company on the current day	$KPI\ Total\ Current\ Assets \div KPI\ Total\ Current\ Liabilities$	No	CN, DE, GB, US
<i>Customer Balance (LC)</i>	The account balance of customers. The data is taken from the <i>Account Balance</i> field of the <i>Business Partner Master Data</i> window of customers. In the SAP Business One Sales app, this KPI appears on the <i>General</i> tab of customers by default, and displays the account balance of the specific customer.	User-defined query <i>Balance Due</i>	No	All
<i>Debt Ratio</i>	The percentage of a company's assets that are provided via debt on the current day	$KPI\ Total\ Liabilities \div KPI\ Total\ Assets$	No	CN, DE, GB, US
<i>DIO</i>	Days of inventory outstanding up to today in the current month. Days of inventory outstanding, the average number of days a company takes to sell its inventory.	$KPI\ Inventory \div KPI\ COGS \times 30$	No	CN, DE, GB, US
<i>DPO</i>	Days of payable outstanding up to today in the current month. Days of payable outstanding, the average number of days a company takes to pay its suppliers.	$KPI\ Accounts\ Payable \div KPI\ COGS \times 30$	No	CN, DE, GB, US
<i>DSO</i>	Days of sales outstanding up to today in the current month. Days of sales outstanding, the average number of days a company takes to collect its account receivables	$KPI\ Accounts\ Receivable \div KPI\ Net\ Sales\ Revenue \times 30$	No	CN, DE, GB, US
<i>Expense 1</i>	Expense amount that needs to be deducted from operating income for generating net profit	Financial KPI factor <i>Expense 1</i> (factor 023)	Yes	DE, GB, US
<i>Expense 2</i>	Expense amount that needs to be deducted from operating income for generating net profit	Financial KPI factor <i>Expense 2</i> (factor 024)	Yes	DE, GB, US
<i>Gearing Ratio</i>	The proportion of debt to equity on the current day	$KPI\ Total\ Liabilities \div KPI\ Total\ Equity$	No	CN, DE, GB, US
<i>Goods Return Amount</i>	Goods return amount in the current month	User-defined query <i>Goods Return Amount</i>	No	All

KPI Name	KPI Description	Data Source	Interim or Not	Localization
<i>Gross Profit</i>	Gross profit amount gained up to today in the current month	Financial KPI factor <i>Gross Profit</i> (factor 016)	No	CN
		KPI <i>Net Sales Revenue</i> – KPI <i>COGS</i>		DE, GB, US
<i>Gross Profit (LTD)</i>	Gross profit amount gained until today	Calculation view <i>Profitability Analysis</i>	No	All
<i>Gross Profit (YTD)</i>	Gross profit amount gained in this year so far	Calculation view <i>Profitability Analysis</i>	No	All
<i>Gross Profit Margin</i>	Gross profit margin up to today in the current month	KPI <i>Gross Profit</i> ÷ KPI <i>Net Sales Revenue</i>	No	CN, DE, GB, US
<i>Gross Profit Margin (YTD)</i>	Gross profit amount divided by net sales amount in this year so far	Calculation view <i>Profitability Analysis</i>	No	All
<i>GRPO Not Invoiced</i>	Goods receipt of purchase order not invoiced in the current month	User-defined query <i>GRPO Not Invoiced</i>	No	All
<i>Inbound Inventory Value</i>	Inbound inventory value in the current month	User-defined query <i>Inbound Inventory Value</i>	No	All
<i>Inventory</i>	Inventory amount on the current day	Financial KPI factor <i>Inventory</i> (factor 002)	Yes	CN, DE, GB, US
<i>Inventory Turnover</i>	Inventory turnover ratio up to today in the current month	KPI <i>COGS</i> ÷ KPI <i>Inventory</i>	No	CN, DE, GB, US
<i>Inventory Turnover (Year)</i>	Inventory turnover of the last 12 months	User-defined query <i>Inventory Turnover</i>	No	All
<i>Inventory Value</i>	Inventory value on the current day	User-defined query <i>Inventory Value</i>	No	All
<i>Net Cash Flow</i>	Net cash flow amount up to today in the current month	Financial KPI factor <i>Net Cash Flow</i> (factor 028)	No	CN, DE, GB, US
<i>Net Cash Flow (Financial)</i>	Net cash flow amount spent on financing activities up to today in the current month	Financial KPI factor <i>Net Cash</i>	No	CN, DE, GB, US

KPI Name	KPI Description	Data Source	Interim or Not	Localization
		<i>Flow (Financing)</i> (factor 027)		
<i>Net Cash Flow (Investment)</i>	Net cash flow amount spent on investing activities up to today in the current month	Financial KPI factor <i>Net Cash Flow (Investing)</i> (factor 026)	No	CN, DE, GB, US
<i>Net Cash Flow (Operating)</i>	Net cash flow amount spent on operating activities up to today in the current month	Financial KPI factor <i>Net Cash Flow (Operating)</i> (factor 025)	No	CN, DE, GB, US
<i>Net Profit</i>	Net profit amount gained up to today in the current month	Financial KPI factor <i>Net Profit</i> (factor 020)	No	CN
		KPI <i>Operating Income</i> – KPI <i>Expense 1</i> – KPI <i>Expense 2</i>		DE, GB, US
<i>Net Profit Margin</i>	Net profit margin up to today in the current month	KPI <i>Net Profit</i> ÷ KPI <i>Net Sales Revenue</i>	No	CN, DE, GB, US
<i>Net Sales Revenue</i>	Net sales revenue amount achieved up to today in the current month	Financial KPI factor <i>Net Sales Revenues</i> (factor 012)	No	CN, DE, GB, US
<i>Number of Open Deliveries</i>	Total number of deliveries whose status is <i>Open</i> . In Customer 360, this KPI displays the number for the relevant customer.	User-defined query <i>Number of Open Deliveries</i>	No	All
<i>Number of Open Sales Orders</i>	Total number of sales orders whose status is <i>Open</i> . In Customer 360, this KPI displays the number for the relevant customer.	User-defined query <i>Number of Open Sales Orders</i>	No	All
<i>Number of Open Sales Quotations</i>	Total number of sales quotations whose status is <i>Open</i> . In Customer 360, this KPI displays the number for the relevant customer.	User-defined query <i>Number of Open Sales Quotations</i>	No	All
<i>Number of Open Service Calls</i>	Total number of service calls whose status is not <i>Closed</i> . In Customer 360, this KPI displays the number for the relevant customer.	User-defined query <i>Number of Open Service Calls</i>	No	All

KPI Name	KPI Description	Data Source	Interim or Not	Localization
<i>OC</i>	<p>Operating cycle up to today in the current month.</p> <p>Operating cycle, the average number of days a company takes in realizing its inventories in cash, equaling the time taken in selling inventories plus the time taken in recovering cash from trade receivables</p>	KPI <i>DSO</i> + KPI <i>DIO</i>	No	CN, DE, GB, US
<i>On-Time Delivery Rate</i>	<p>The total of the following: The result of the number of on-time delivered sales orders divided by the number of all delivered sales orders to each business partner.</p> <p>This KPI covers sales orders within this year according to their document dates. The deliveries whose posting dates are earlier than or equal to the posting dates of sales orders are considered as on-time deliveries.</p> <p>In Customer 360, this KPI displays the rate for the relevant customer.</p>	Calculation view <i>On-Time Delivery Analysis</i>	No	All
<i>Open Amount of Deliveries</i>	Total open amount of all deliveries	Calculation view <i>Delivery Header</i>	No	All
<i>Operating Cost</i>	Operating cost generated up to today in the current month	Financial KPI factor <i>Operating Costs</i> (factor 017)	Yes	DE, GB, US
<i>Operating Income</i>	Operating income gained up to today in the current month	Financial KPI factor <i>Operating Income</i> (factor 018)	No	CN
		KPI <i>Gross Profit</i> – KPI <i>Operating Cost</i>		DE, GB, US
<i>Operating Margin</i>	Operating margin up to today in the current month	KPI <i>Operating Income</i> ÷ KPI <i>Net Sales Revenue</i>	No	CN, DE, GB, US
<i>Opportunity Win Rate (LTD)</i>	The result of the number of won opportunities divided by the number of all opportunities until today	Calculation view <i>Opportunity Win Rate Analysis</i>	No	All
<i>Outbound Inventory Value</i>	Outbound inventory value in the current month	User-defined query <i>Outbound Inventory Value</i>	No	All

KPI Name	KPI Description	Data Source	Interim or Not	Localization
<i>Payables Overdue</i>	Payables overdue up to today	(total <i>Balance Due</i> – total <i>Future Remit</i>) in the <i>Vendor Liabilities Aging</i> report	No	All
<i>Potential Amt of Open Opportunities</i>	The total potential amount of all open opportunities whose start dates are within this year. The data is taken from the <i>Potential Amount</i> field on the <i>Potential</i> tab of the <i>Opportunity</i> window.	Calculation view <i>Opportunities</i>	No	All
<i>Potential Amt of Open Opportunities - Curr. User</i>	The total potential amount of all open opportunities of the currently logged-on sales employee. The data is taken from the <i>Potential Amount</i> field on the <i>Potential</i> tab of the <i>Opportunity</i> window of the currently logged-on sales employee. In the SAP Business One Sales app, this KPI appears in the KPI screen by default.	User-defined query <i>Opportunity</i>	No	All
<i>Quick Ratio</i>	An indication of a company's ability to use its near cash or quick assets to extinguish or retire its current liabilities immediately on the current day	$(\text{KPI Cash} + \text{KPI Accounts Receivable}) \div \text{KPI Total Current Liabilities}$	No	CN, DE, GB, US
<i>Receivables Overdue</i>	Receivables overdue up to today	(total <i>Balance Due</i> – total <i>Future Remit</i>) in the <i>Customer Receivables Aging</i> report	No	All
<i>ROE</i>	Return on equity, an indication of a company's efficiency at generating profits from every unit of its total equity up to today in the current month	$\text{KPI Net Profit} \div \text{KPI Total Equity}$	No	CN, DE, GB, US
<i>Sales Order Amount of This Month (LC) - Curr. User</i>	The total sales order amount of this month of the currently logged-on sales employee. The data is taken from the <i>Total</i> field of the <i>Sales Order</i> window whose posting date is within the current month of the currently logged-on sales employee. In the SAP Business One Sales app, this KPI appears in the KPI screen by default.	User-defined query <i>Sales Order</i>	No	All

KPI Name	KPI Description	Data Source	Interim or Not	Localization
<i>Sales Return Amount</i>	Sales return amount in the current month	User-defined query <i>Sales Return Amount</i>	No	All
<i>Sales Return Amount for This Year</i>	Total amount of sales returns whose posting dates are within this year	Calculation view <i>Return Header</i>	No	All
<i>Total Amount of Open Deliveries (LC)</i>	The total amount of all open deliveries. The data is taken from the <i>Total</i> field of the <i>Delivery</i> window whose status is <i>Open</i> . In the SAP Business One Sales app, this KPI appears on the <i>General</i> tab of customers by default, and displays the total amount of all open deliveries of the specific customer.	User-defined query <i>Sales Order</i>	No	All
<i>Total Assets</i>	Total assets on the current day	Financial KPI factor <i>Total Assets</i> (factor 006)	No	CN, DE, GB, US
<i>Total Current Assets</i>	Total current assets amount on the current day	Financial KPI factor <i>Current Assets</i> (factor 005)	Yes	CN, DE, GB, US
<i>Total Current Liabilities</i>	Total current liabilities amount on the current day	Financial KPI factor <i>Current Liabilities</i> (factor 008)	Yes	CN, DE, GB, US
<i>Total Equity</i>	Total equity on the current day	Financial KPI factor <i>Total Equity</i> (factor 011)	No	CN, DE, GB, US
<i>Total Liabilities</i>	Total liabilities on the current day	Financial KPI factor <i>Total Liabilities</i> (factor 010)	No	CN, DE, GB, US
<i>Total Payable Amount</i>	Total payable amount in the current month	User-defined query <i>Total Payable Amount</i>	No	All
<i>Total Purchase Amount</i>	Total purchase amount in the current month	User-defined query <i>Total Purchase Amount</i>	No	All

KPI Name	KPI Description	Data Source	Interim or Not	Localization
<i>Total Receivable Amount</i>	Total receivable amount in the current month	User-defined query <i>Total Receivable Amount</i>	No	All
<i>Total Receivable Amount (LTD)</i>	Total receivable amount until today	Calculation view <i>Customer Receivables Aging</i>	No	All
<i>Total Sales Amount</i>	Total sales amount in the current month	User-defined query <i>Total Sales Amount</i>	No	All
<i>Total Sales Amount (LTD)</i>	Total sales amount until today	Calculation view <i>Profitability Analysis</i>	No	All
<i>Total Sales Amount (YTD)</i>	Total sales amount in this year so far	Calculation view <i>Profitability Analysis</i>	No	All
<i>Weighted Amount of All Open Opportunities (LC)</i>	Total (YTD) weighted amount of all open sales opportunities displayed in the local currency. The KPI covers opportunities within the current year according to their start dates.	Calculation view <i>Opportunity Win Rate Analysis</i>	No	All
<i>Working Capital</i>	Total working capital up to the current day	KPI <i>Cash + Accounts Receivable</i> + KPI <i>Inventory</i> – KPI <i>Accounts Payable</i>	No	CN, DE, GB, US

5.4.2 Insight to Action

In the view mode of the Fiori-style cockpit, for KPIs that you have added actions, you can click the KPI to perform defined actions.

For more information about actions in KPI, look for the [How to Work with Pervasive Analytics](https://sappartneredge.com) guide on sappartneredge.com.

5.5 Count

A count widget displays the number of results of a user-defined query. In the view mode of the Fiori-style cockpit, from the count widget, you can open the detailed results of the user-defined query.

5.5.1 Predefined Count Widgets

Note

You cannot delete a predefined count widget, but you can edit it in the *Count Widget Setup* window. However, we recommend that when editing the predefined count widgets, you keep in mind that three of the predefined count widgets are embedded in the workbench processes. For more information, see [Cross-Widget Actions](#).

SAP provides the following 5 predefined count widgets:

- *My Sales Orders Not Delivered*
- *My Open A/R Invoices*
- *My Purchase Orders Not Received*
- *My Open A/P Invoices*
- *My Open Inv. Transfer Request*

5.5.2 Designing Count Widgets

Prerequisite

- You have full authorizations for count widget setup. To set user authorizations for count widget setup, from the SAP Business One, version for SAP HANA *Main Menu*, choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*. In the *Authorizations* window, select the user for whom you want to set authorizations, and in *Fiori-Style Cockpit Management* → *Cockpit Designers* → *Count Widget Setup*, select *Full Authorization*.
- You have authorizations for at least one user-defined query category. To set user authorizations for query categories, in the *Authorizations* window, select the user for whom you want to set authorizations, and select *Read-Only* or *Full Authorization* in the authorization group to which the query category you want the user to use is assigned. You can find the authorization group under *Query Generator* under *Reports*.

Procedure

1. From the SAP Business One, version for SAP HANA menu bar, choose *Tools* → *Cockpit* → *Count Widget Setup*.

The *Count Widget - Setup* window appears.

- In the *Count Widget - Setup* window, specify the code, name, and description for the count widget. The name and description will appear in the count widget when you add it to the Fiori-style cockpit.
- Choose the *Choose Query* button to select the user-defined query based on which you want to design the count widget.

You can choose a query from all the authorized query categories except the *System* category.

When you add the count widget to the Fiori-style cockpit, it will display the number of results returned by the user-defined query.

i Note

To grant the query category authorization to users, from the SAP Business One, version for SAP HANA *Main Menu*, choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*. In the *Authorizations* window, select the user to whom you want to grant the authorization, and select *Full Authorization* in the authorization group to which the query category you want the user to use is assigned. You can find the authorization group under *Query Generator* under *Reports*.

i Note

In the user-defined query, you can use the keyword `[$USER]` to indicate the user ID of the currently logged-on user. This keyword can be identified only by the count widget.

For example, the query for the count widget *My Open Inv. Transfer Requests* is as follows:

```
SELECT T0."DocEntry" AS "Document Internal Key", T0."DocNum" AS "Document
Number", T0."DocDate" AS "Posting Date", T0."DocDueDate" AS "Due Date", (SELECT
TT0."WhsCode" FROM OWHS TT0 WHERE TT0."WhsCode" = T0."Filler") AS "From
Warehouse", (SELECT TT0."WhsCode" FROM OWHS TT0 WHERE TT0."WhsCode" =
T0."ToWhsCode") AS "To Warehouse" FROM OWTQ T0 INNER JOIN OUSR T1 ON
T0."UserSign" = T1."USERID" WHERE T0."DocStatus" = 'O' AND T1."USERID" = [$USER]
ORDER BY T0."DocDueDate", T0."DocNum"
```

- To save the count widget, choose the *Add* button.
- [Optional] To delete the user-defined count widget, in the *Count Widget - Setup* window, right-click anywhere, and choose *Remove*.

Result

In the widget gallery, you can find the count widget that you created, and you can select it to add to the Fiori-style cockpit.

5.5.3 Insight to Action

In the view mode of the Fiori-style cockpit, in the count widget, you can choose the number to open the detailed results of the user-defined query.

In the detailed results, you can choose the yellow link button to open relevant business objects. The yellow link buttons appear only when **both** of the following two conditions are met:

- In the user-defined query, based on which you designed the count widget, you have selected the primary key of the business object.

Note

For marketing documents, besides the primary key **DocEntry**, you can also select **DocNum** to enable the link buttons.

Example

The following query returns all the open sales orders with three link buttons, one of which opens the business partner master data:

```
SELECT T0."DocEntry", T0."DocNum", T1."CardCode", T0."DocDate", T0."DocTotal"  
FROM ORDR T0 INNER JOIN OCRD T1 ON T0."CardCode" = T1."CardCode" WHERE  
T0."DocStatus" = 'O'
```

If you replace **T1."CardCode"** with **T0."CardCode"**, there will be no link button for business partners.

- The linked business object is within the following list:

Business Object	Table
Business Partner	OCRD
Item Master	OITM
Warehouse	OWHS
Sales Opportunity	OOPR
Sales Quotation	OQUT
Sales Order	ORDR
Delivery	ODLN
Return	ORDN
A/R Down Payment Invoice	ODPI
A/R Invoice	OINV
A/R Credit Memo	ORIN
A/R Reserve Invoice	OINV
Purchase Request	OPRQ
Purchase Quotation	OPQT
Purchase Order	OPOR
Goods Receipt PO	OPDN
Goods Return	ORPD
A/P Down Payment Invoice	ODPO
A/P Invoice	OPCH
A/P Credit Memo	ORPC
A/P Reserve Invoice	OPCH
Landed Cost	OIPF
Bin Location Master Data	OBIN
Goods Receipt	OIGN
Goods Issue	OIGE
Inventory Transfer Request	OWTQ
Inventory Transfer	OWTR
Inventory Counting	OINC
Inventory Opening Balance	OIQI
Inventory Posting	OIQR

Business Object	Table
Inventory Revaluation	OMRV
Pick List	OPKL
Chart of Account	OACT
Journal Entry	OJDT
Journal Voucher	OBTF
Posting Template	OTRT
Cost Center	OPRC
Distribution Rule	OOCR

5.6 Workbench

The workbench widget standardizes and visualizes the most common business processes. Employees in different roles can find a reasonable and standard process to follow. The workbench widget simplifies the complex functions by grouping common functions together according to the business purposes. It provides a consolidated entry for users to perform their jobs, thus enhancing both the employee's working efficiency and the company's operation efficiency.

5.6.1 Predefined Workbenches

For the workbench widget, SAP provides the following four predefined business processes.

- **Sales Process:**
This process starts with the sales quotation and ends with the incoming payment. With this workbench, a sales employee can directly access the main tasks and view relevant information, if required.
- **Purchasing Process:**
This process starts with the purchase request and ends with the outgoing payment. With this workbench, a buyer can directly access the main tasks and view relevant information, if required.
- **Inventory Management Process:**
All inventory-related documents and master data are included in this process. Users can retrieve and analyze inventory-related data from different perspectives.
- **Financial Process:**
All commonly used financial functions are included in this process. Users in different financial roles can carry out their daily operations by accessing relevant tasks from this workbench.

5.6.2 Insight to Action

The workbench widget not only provides different users with a standardized and visualized working process, it also enables users to take actions right away without having to switch among functions or modules.

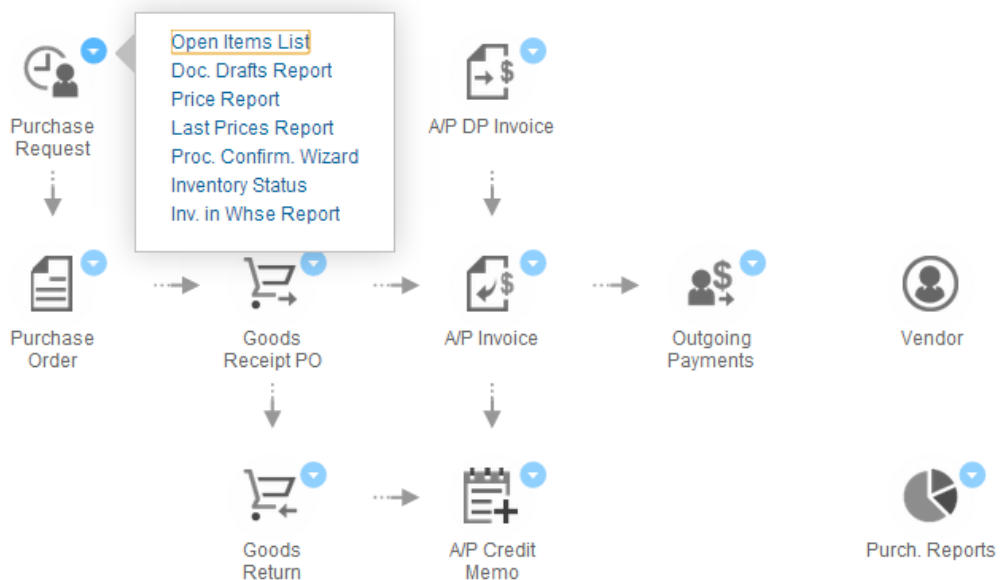
In the view mode of the Fiori-style cockpit, in the workbench widget, you can choose the links to take various actions.


In the following example, you can find the actions Julie, a purchasing-role user, takes to complete her daily work with her *Purchasing Process* workbench.



Purchasing New Items

Julie received a request for purchasing 1,000 items X, since the inventory level has fallen below the minimum quantity in warehouse *01*.

Purchasing Process



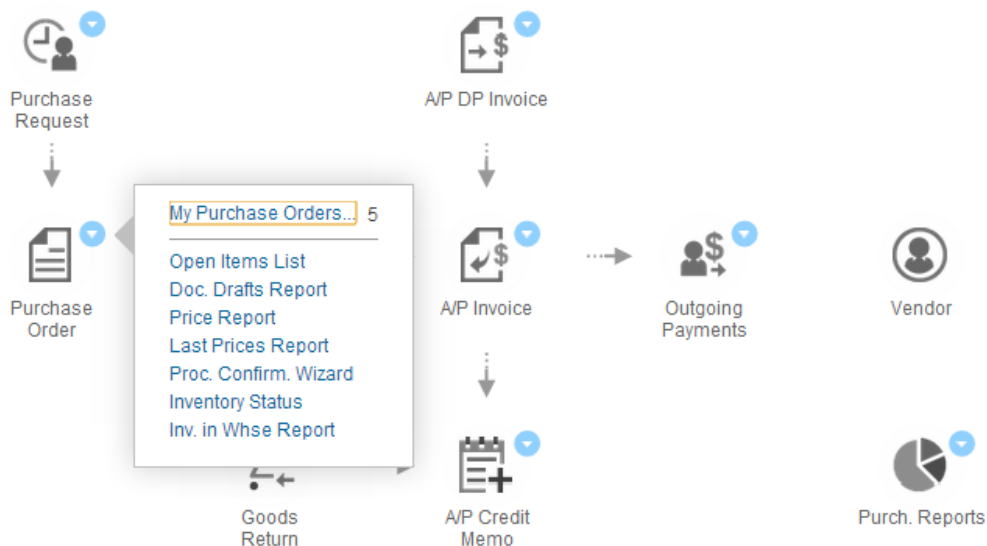
1. Before placing a purchase request, Julie wants to check the following:
 - o Whether any item X has been ordered but not received yet.
To do this, she performs the following:
 1. She chooses the  button of the *Purchase Order* icon. A content menu appears.
 2. She chooses *Inv. In Whse Report*. The *Inventory in Warehouse Report - Selection Criteria* window appears.
 3. In the *Inventory in Warehouse Report- Selection Criteria* window, she specifies relevant information to generate a detailed report about item X in warehouse *01*.
 4. In the *Inventory in Warehouse Report (Detailed)* window, Julie confirms that all ordered item X has been received.

-
- The purchasing prices of item X in the last deals with every vendor.
To do this, she performs the following:
 1. She chooses the  button of the *Purchase Request* icon. A content menu appears.
 2. She chooses *Last Prices Report*. The *Last Prices Report* window appears.
 3. In the *Last Prices Report* window, she specifies relevant information to view the purchasing prices of item X in the last deals with every vendor.
 4. Julie locates the 3 vendors that offered the lowest prices in their latest deals: vendor A, vendor B, and vendor C.
 - 2. Now Julie wants to place the purchase orders, and she can perform in either of the following ways:
 - Create purchase requests directly
To do this, she performs the following:
 1. Choose the *Purchase Request* icon. The *Purchase Order* window appears.
 2. Specify relevant information and create a purchase request for vendor A.
 3. Repeat step 1 and 2 to create a purchase request for vendor B and one for vendor C.
 - Create purchase requests using the procurement confirmation wizard
To do this, she performs the following:
 1. She chooses the  button of the *Purchase Request* icon. A content menu appears.
 2. She chooses *Proc. Confirm. Wizard*. The procurement confirmation wizard appears.
 3. In the procurement confirmation wizard, she specifies relevant information in each step, and finishes the wizard.
 4. Three purchase requests are created for vendor A, vendor B, and vendor C, respectively.


Tracking Ordered Items

Julie does a weekly check to see whether all items that she ordered have been received.

Purchasing Process






To do this, she performs the following:

1. She chooses the  button of the *Purchase Order* icon. A content menu appears.
2. She chooses *My Purchase Orders Not Received*. The procurement confirmation wizard appears.
3. In the procurement confirmation wizard, she specifies relevant information in each step, and finishes the wizard.

5.6.3 Cross-Widget Actions

The following three predefined count widgets are embedded in the workbench processes.

- *My Sales Order Not Delivered*
This count widget is embedded in the *Sales Process* workbench.
To open this count widget, choose the  button of the *Sales Order* icon. A content menu appears containing the *My Sales Orders not Delivered* option.
- *My Purchase Order Not Received*
This count widget is embedded in the *Purchasing Process* workbench.
To open this count widget, choose the  button of the *Purchase Order* icon. A content menu appears containing the *My Purchase Orders not Received* option.
- *My Open Inventory Transfer Request*
This count widget is embedded in the *Inventory Management Process* workbench.

To open this count widget, choose the  button of the *Inventory Transfer* icon. A content menu appears containing the *My Open Inv. Transfer Requests* option.

Changing the Linked Query for the Embedded Count Widgets

Note

We do **NOT** recommend that you change the predefined count widgets to completely new count widgets. However, if there are requests to customize the predefined count widgets according to your own needs, you can follow the procedure in this section to modify the predefined count widgets.

The three predefined count widgets embedded in the workbench processes are linked to relevant predefined queries by default. However, to fulfill the specific counting needs, you can change the linked queries to your own user-defined queries.

The information for the workbench processes and their embedded count widgets are as follows:

Workbench Process	Embedded Count Widget Code	Linked Predefined Query
<i>Sales Process</i>	<i>SYS_Open_SO</i>	<i>My Sales Orders Not Delivered</i>
<i>Purchasing Process</i>	<i>SYS_Open_PO</i>	<i>My Purchase Order Not Received</i>
<i>Inventory Management Process</i>	<i>SYS_Open_TR</i>	<i>My Open Inv. Transfer Requests</i>

Note

For the embedded count widgets, the widget codes are not editable. Change the widget names, descriptions, and linked queries to reflect the widget usages.

Prerequisite

- You have full authorizations for count widget setup.
- You have authorizations for at least one user-defined query category.

For more information, see the *Prerequisite* section in [Designing Count Widgets](#).

Procedure

1. From the SAP Business One, version for SAP HANA menu bar, choose *Tools* → *Cockpit* → *Count Widget Setup*.

The *Count Widget - Setup* window appears.

2. In the *Count Widget - Setup* window, find the embedded count widget for which you want to change the linked query, and specify the new name and description for the count widget.
3. Choose the *Choose Query* button to select the user-defined query based on which you want to change the count widget.

You can choose a query from all the authorized query categories except the *System* category.

Note

To grant the query category authorization to users, from the SAP Business One, version for SAP HANA *Main Menu*, choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*. In the *Authorizations* window, select the user to whom you want to grant the authorization, and select *Full*


Authorization in the authorization group to which the query category you want the user to use is assigned. You can find the authorization group under *Query Generator* under *Reports*.

Note


In the user-defined query, you can use the keyword `[$USER]` to indicate the user ID of the currently logged-on user. This keyword can be identified only by the count widget.

For example, the query for the count widget *My Open Inv. Transfer Requests* is as follows:

```
SELECT T0."DocEntry" AS "Document Internal Key", T0."DocNum" AS "Document
Number", T0."DocDate" AS "Posting Date", T0."DocDueDate" AS "Due Date", (SELECT
TT0."WhsCode" FROM OWHS TT0 WHERE TT0."WhsCode" = T0."Filler") AS "From
Warehouse", (SELECT TT0."WhsCode" FROM OWHS TT0 WHERE TT0."WhsCode" =
T0."ToWhsCode") AS "To Warehouse" FROM OWTQ T0 INNER JOIN OUSR T1 ON
T0."UserSign" = T1."USERID" WHERE T0."DocStatus" = 'O' AND T1."USERID" = [$USER]
ORDER BY T0."DocDueDate", T0."DocNum"
```

4. To save the count widget, choose the *Update* button.
5. In the upper right corner of the Fiori-style cockpit, choose .

Result

In the workbench processes, when you choose the  button of the intended icon, the new name of the count widget is displayed in the content menu, and the count widget displays the number of results returned by the new user-defined query.

5.7 Browser

The browser widget enables you to embed Web documents by setting up URL addresses or apps.

5.7.1 Predefined Browser Widget

Note

You cannot delete the predefined browser widget, but you can edit it in the *Browser Widget - Setup* window.

SAP provides a predefined browser widget with the URL address of <https://go.sap.com/solution/sme-business-software.html>.

5.7.2 Designing Browser Widgets

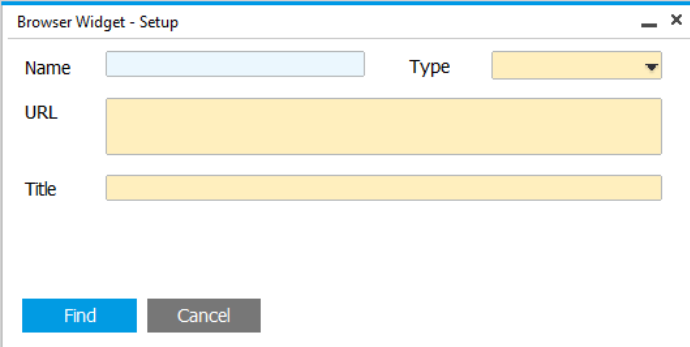
Prerequisite

You have full authorizations for browser widget setup. To set user authorizations for browser widget setup, from the SAP Business One, version for SAP HANA *Main Menu*, choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*. In the *Authorizations* window, select the user for whom you want to set authorizations, and in *Fiori-Style Cockpit Management* → *Cockpit Designers* → *Browser Widget Setup*, select *Full Authorization*.

Procedure

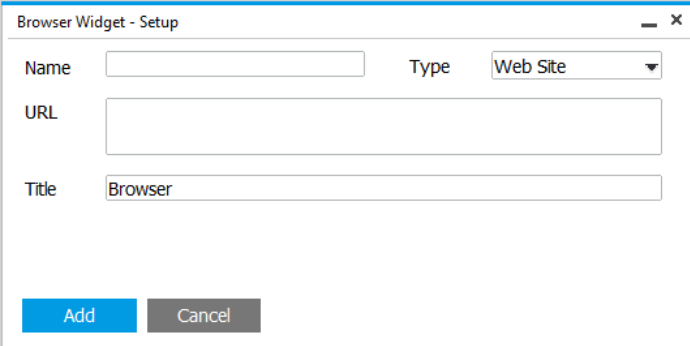
1. From the SAP Business One, version for SAP HANA menu bar, choose *Tools* → *Cockpit* → *Browser Widget Setup*.

The *Browser Widget - Setup* window appears in *Find* mode.



The screenshot shows the 'Browser Widget - Setup' window in 'Find' mode. The window has a title bar with 'Browser Widget - Setup' and standard window controls. It contains four input fields: 'Name' (a text box), 'Type' (a dropdown menu), 'URL' (a text box), and 'Title' (a text box). At the bottom, there are two buttons: 'Find' (highlighted in blue) and 'Cancel' (greyed out).

2. To add a browser widget, switch to *Add* mode.



The screenshot shows the 'Browser Widget - Setup' window in 'Add' mode. The window has the same title bar and layout as the previous screenshot. The 'Name' field is empty. The 'Type' dropdown menu is set to 'Web Site'. The 'URL' field is empty. The 'Title' field contains the text 'Browser'. At the bottom, there are two buttons: 'Add' (highlighted in blue) and 'Cancel' (greyed out).

3. In the *Name* field of the *Browser Widget - Setup* window, specify a unique name for the browser widget.
4. To add different types of browser widgets, follow the procedure below:
 - o To add a Web site browser widget, in the *Type* dropdown list, select *Web Site*, and in the *URL* field, enter the URL address.

Note

You must enter a URL address that:

- Starts with **https**.
- Includes at least one dot (.) before the first slash. For example, the URL address of <https://frncel1.emea.global.corp.sap:40000/test/index.html> works, while the URL address of <https://frncel1:40000/test/index.html> does not work.

Caution

If the URL you defined does not allow its content to be embedded into other sites, when you add the browser widget to the Fiori-style cockpit, the browser widget will be blank. This happens when the value for the X-Frame-Options is one of the following:

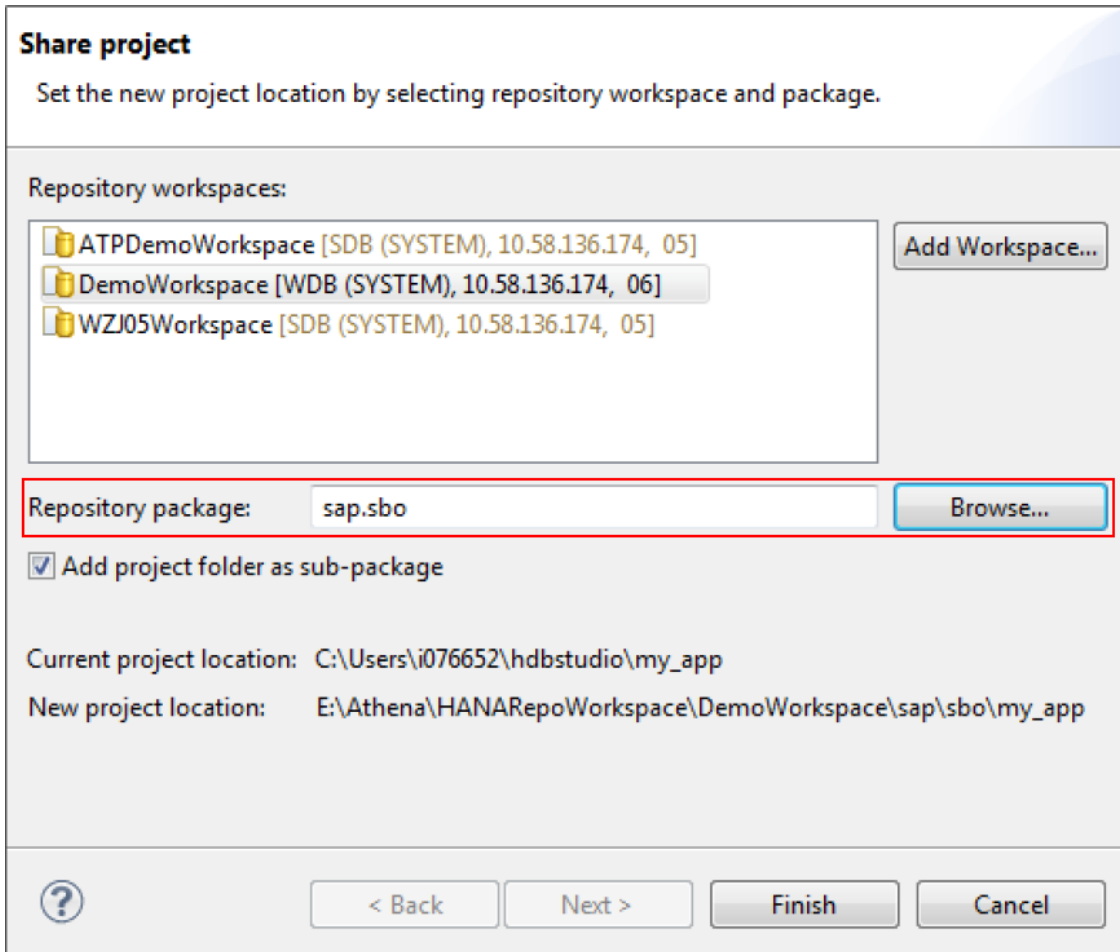
- **DENY**
- **SAMEORIGIN**, and the domain name of the URL you defined is not the domain name of the Fiori-style cockpit. You can locate this domain name in the URL of the *Analytics Platform* service on the *Services* tab of the SLD control center. For more information about the SLD control center, look for *SAP Business One Administrator's Guide, version for SAP HANA* on sappartneredge.com.
- **ALLOW-FROM uri**, and the **uri** is not the domain name of the Fiori-style cockpit.

The X-Frame-Options response header is used to indicate whether or not a browser should be allowed to render a page in a **<frame>**, **<iframe>**, or **<object>**.

- To add an app browser widget, in the *Type* dropdown list, select *App*, and in the *App* dropdown list, select the extension that you have assigned to this company.

Note

Make sure the app package path starts with `sap.sbo`. Otherwise, the app will not appear in the *App* dropdown list. The app package path is defined in the *Repository package* field of the *Share project* window when you share the project for SAP HANA XS. For more information about packaging and deploying apps, look for the guide *Working with App Framework for SAP Business One, version for SAP HANA* on sappartneredge.com.



Share project
Set the new project location by selecting repository workspace and package.

Repository workspaces:

- ATPDemoWorkspace [SDB (SYSTEM), 10.58.136.174, 05]
- DemoWorkspace [WDB (SYSTEM), 10.58.136.174, 06]
- WZJ05Workspace [SDB (SYSTEM), 10.58.136.174, 05]

Repository package:

Add project folder as sub-package

Current project location: C:\Users\i076652\hdbstudio\my_app
New project location: E:\Athena\HANAREpoWorkspace\DemoWorkspace\sap\sbo\my_app

- In the *Title* field, enter the title for the browser widget. The title will appear in the browser widget when you add it to the Fiori-style cockpit.
- To save the browser widget, choose the *Add* button.
- [Optional] To delete the user-defined browser widget, in the *Browser Widget - Setup* window, right-click anywhere, and choose *Remove*.

Result

In the widget gallery, you can find the browser widget that you created, and you can select it to add to the Fiori-style cockpit.

5.8 My Recent Updates

This widget provides up to 20 links to your newly added or updated objects and is refreshed automatically every minute.

In the lower right corner of the widget, choose the up or down arrow to see more records.

5.8.1 Insight to Action

In the view mode of the Fiori-style cockpit, in the *My Recent Updates* widget, you can choose the links to see the specific records you added or updated.

5.9 Common Functions

This 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, version for SAP HANA menu options to this widget as shortcuts. You can also remove menu options.

- To add a menu option for this widget, drag the menu option and drop it in the widget.
- To remove a menu option from this widget, drag the menu option out of the widget window, and then drop it.

Default Contents of the Common Functions Widget for Authorization Groups

The table below lists the default contents of the *Common Functions* widget for authorization groups *Finance*, *Sales*, *Purchase*, and *Inventory*.

Authorization Group	Default Contents of the <i>Common Functions</i> Widget
Finance	<ul style="list-style-type: none">• Journal Entry• Journal Vouchers• Incoming Payments• Outgoing Payments• Checks for Payment• A/R Invoice• A/P Invoice• A/R Credit Memo• A/P Credit Memo
Sales	<ul style="list-style-type: none">• Sales Quotation• Sales Order• Delivery• A/R Invoice

Authorization Group	Default Contents of the <i>Common Functions</i> Widget
	<ul style="list-style-type: none"> • Item Master Data • Price Lists • Business Partner Master Data
Purchase	<ul style="list-style-type: none"> • Purchase Order • Goods Receipt PO • Goods Return • A/P Down Payment Invoice • A/P Down Payment Request • A/P Invoice • Purchase Analysis • Item Master Data • Business Partner Master Data • Inventory in Warehouse Report
Inventory	<ul style="list-style-type: none"> • Goods Receipt • Goods Issue • Inventory Transfer • Inventory Counting • Inventory Posting • Inventory Revaluation • Item Master Data • Batch Management • Open Items List

5.10 Messages and Alerts

This widget displays messages in a clearer and easier-to-read way.

To view the details of one message, in the widget, choose the subject of the message.

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

In the *Messages/Alerts Overview* window, you can forward, reply to, and delete messages. For more information about the *Messages/Alerts Overview* window, see the online help documentation.

Note

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

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