Getting Started with SAP Business One

SAP Business One Version 9.3

Run Simple

PUBLIC

Welcome to Getting Started with SAP Business One.

Objectives

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

- Log on to SAP Business One
- Navigate in the system
- Personalize a cockpit and save as a template

In this session, we will get started using SAP Business One.
After this session you will be able to log on to and navigate in SAP Business One. You will also be able to set up a personalized cockpit tailored to a role and save it as a template.

Business Example

- As a new team member at OEC Computers, you will be cross training in a number of areas.
- You want to set up a SAP Business One cockpit that will make your job easier to do and quicker to get up to speed on new tasks.
- Your first steps will be to log into the system, learn how to navigate and set up a cockpit that will support your needs.

As a new team member at OEC Computers, you will be cross training in a number of areas.
You want to set up a SAP Business One cockpit that will make your job easier to do and quicker to get up to speed on new tasks.
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Superusers and End Users

Superusers

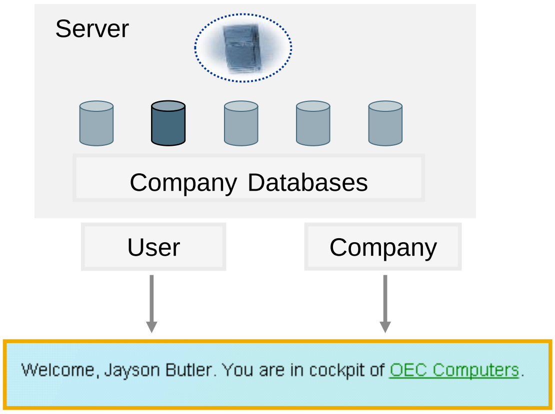
- Access to everything

End Users

- Restricted due to authorizations
- Typically see a subset of the menu

There are two types of users in SAP Business One: superusers and normal (or end) users.
Superusers have access to everything, therefore, they typically view the full menu.
End users are restricted to certain actions and menu items due to license type and authorizations.
Therefore, end users typically see a subset of the options tailored to their role.
We will look at some ways to tailor the cockpit and menu for users to make working in SAP Business One more efficient and enjoyable.

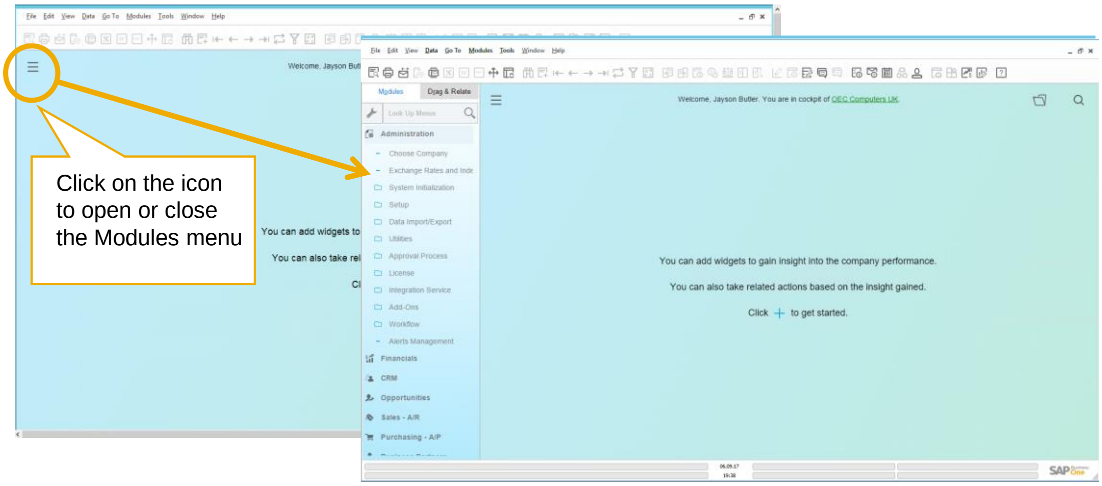
Choose Company



Administration → Choose Company

- In SAP Business One, a company is represented as a database.
- When you log into SAP Business One, you choose the company to log into.
- Why would a small business have more than one company? Perhaps the company has two legal entities within their business, a situation that requires maintaining separate databases.
- Besides specifying the company, you enter a user and a password to log in.
- After you have logged in, a welcome message with the user name and company appear in the cockpit area.
- If you need to change companies while logged in, you can use the *Choose Company* transaction in the *Administration* menu.
- The next time you log in, you will be directed to the same company database. If you wish to log into a different one, choose *Change Company* in the login window.

First impressions



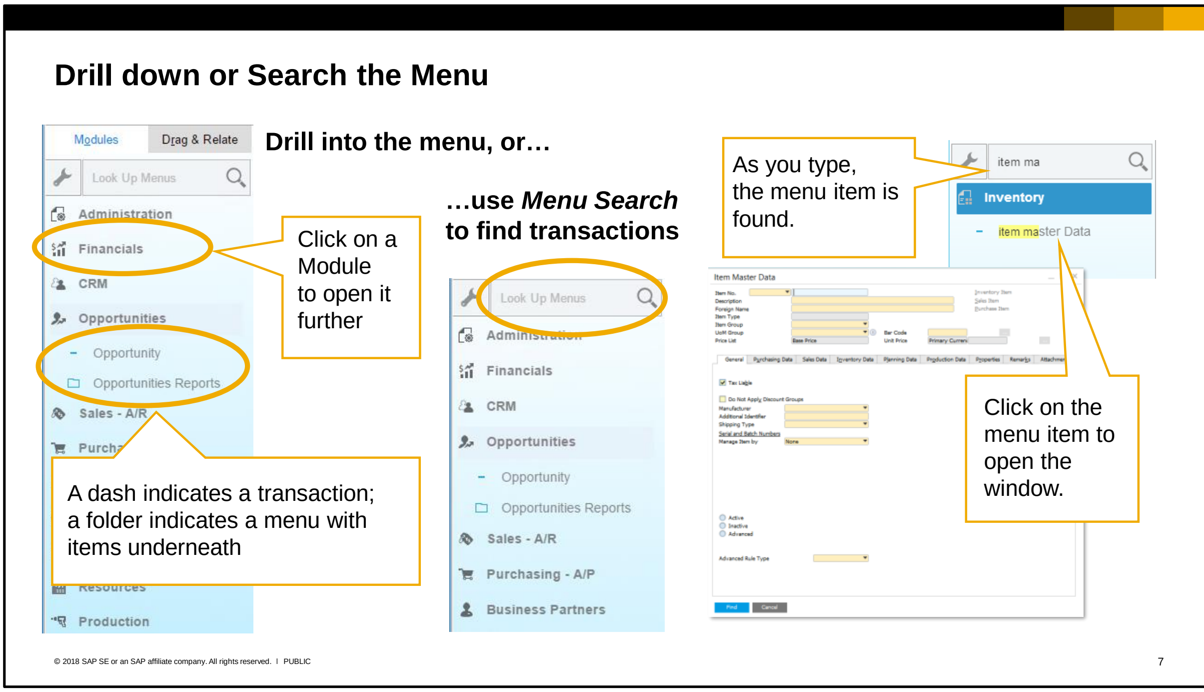
When you first log in to SAP Business One, your cockpit will likely be empty and the main menu will be hidden.

Along the top you will see a menu and toolbar.

Instructions in the center of the screen tell you how to add widgets to the cockpit. We will talk about that later.

Before we get to that, let’s talk about basic navigation.

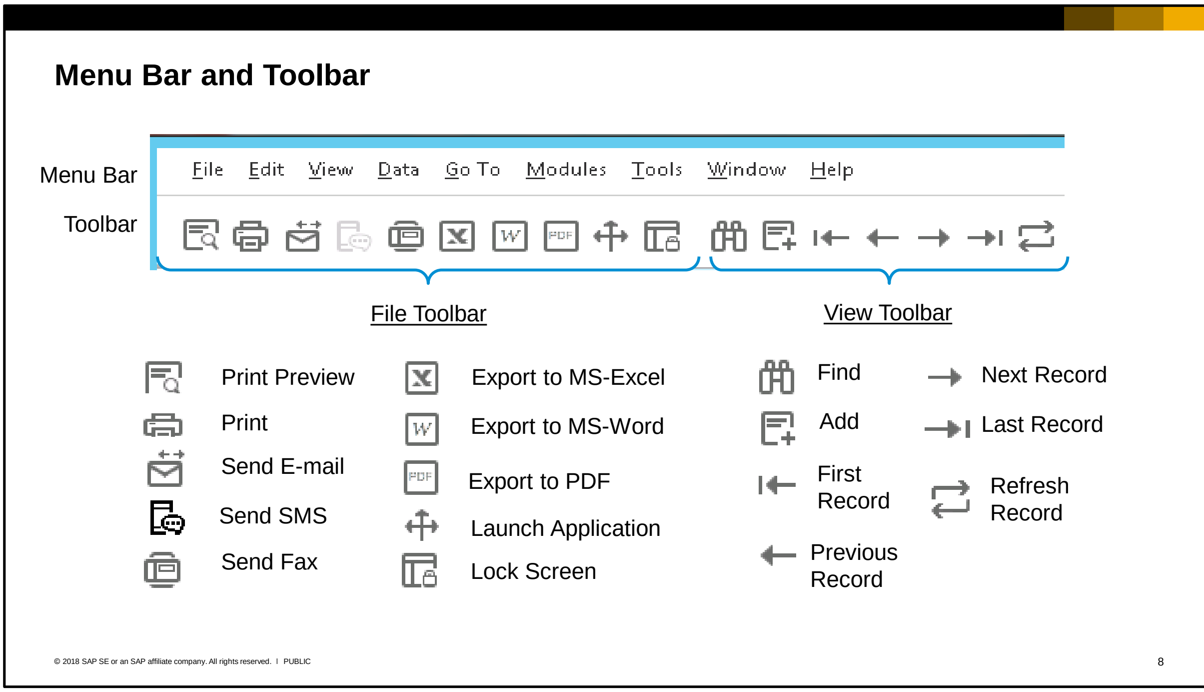
To open the main menu, you can use the icon on the top right of the screen. This icon allows you to toggle between opening and closing the menu.



When the menu is open, you can drill into each menu item. The highest level of the menu lists SAP Business One modules, from there you can drill into submenus and down into the transactions themselves.

Or you can use the menu search field to find menu items quickly.

For example, you could type “item master” to quickly find the Item Master Data transaction in the menu. As you type, the menu item is found. You can then click on the menu item to open it.



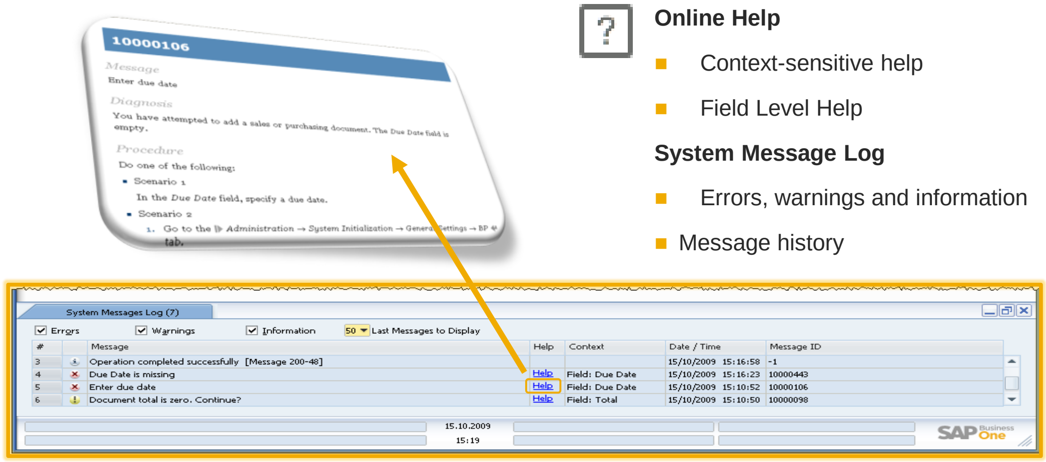
Additionally a menu bar displays at the top of the screen. The menu bar contains the Windows standard menu (File, Edit, Window, Help) as well as generic SAP Business One functions.

A row of toolbars displays under the menu bar. Each toolbar is a collection of icon buttons that grant you easy access to commonly-used functions. The functions represented by the buttons are also available in the menu bar.

Active functions appear in color, and inactive functions gray out.

This graphic shows only two of the toolbars available to you. You can choose which toolbars will be displayed or hidden. To hide or show a toolbar, right-click in the toolbar row and check or uncheck the appropriate toolbar.

Online Help



Online Help

- Context-sensitive help
- Field Level Help

System Message Log

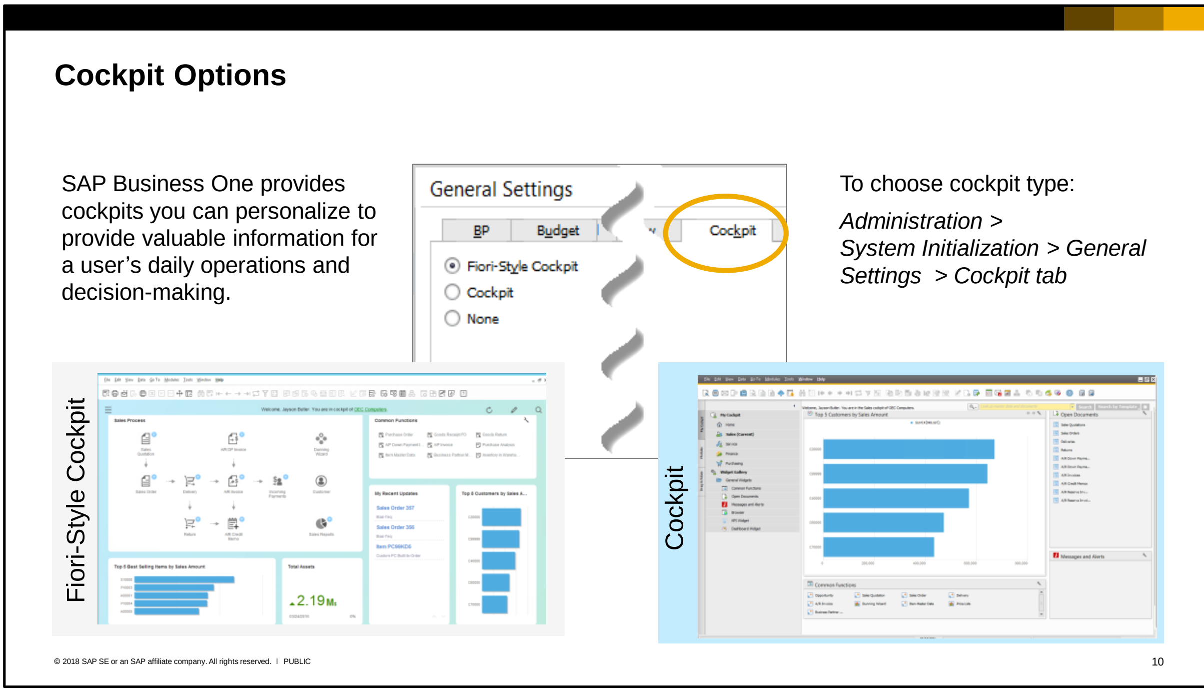
- Errors, warnings and information
- Message history

Online help can be accessed several ways. The Context Help icon is found on the right edge of the toolbar. This icon will give you context-sensitive help about the particular screen you are on. Another way to access context-sensitive help is to press the F1 key.

By highlighting a field and pressing Shift + F1, you can get Field Level Help.

The System Messages Log displays up to the last 50 system messages that appeared on the application window for the current user since the last login. The window displays errors, warnings or information messages. This pane appears at the bottom part of SAP Business One application, but you can close it, move it, and re size it as required, like any other application window.

A hyperlink to relevant help files may appear in the row. Click on it to read more detailed information about the message. When available, the system message will display an eight or nine digit unique identifier. You can use this ID as a search key in the online help.



SAP Business One provides cockpits you can personalize to provide valuable information for a user’s daily operations and decision-making.

If you are running SAP Business One, version for HANA, you have the option to use the Fiori cockpit with an HTML5 graphical user interface as well as the older style cockpit.

With MS SQL you do not have the option of running the Fiori interface.

You also have the option with both platforms to turn off the cockpit.

You can choose the desired cockpit style for a company database on the *Cockpit* tab in the *General Settings* transaction.

A individual user cannot choose which type of cockpit to use, however, they do have the option to turn off their own cockpit. Their decision will not affect other users. This is done in the *Cockpit* window in the *Tools* menu.

Personalizing the Fiori-style Cockpit

You can personalize the cockpit to streamline your work environment. Move, add or delete widgets.

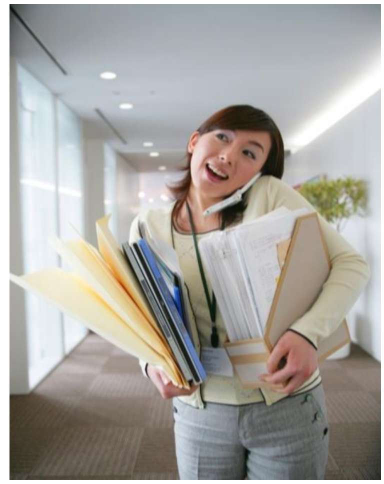
Use this icon to edit the cockpit

- The cockpit widgets will gray out
- You can drag unwanted widgets to the trash can
- You can rearrange the widgets

Use this icon to open the Widgets Gallery

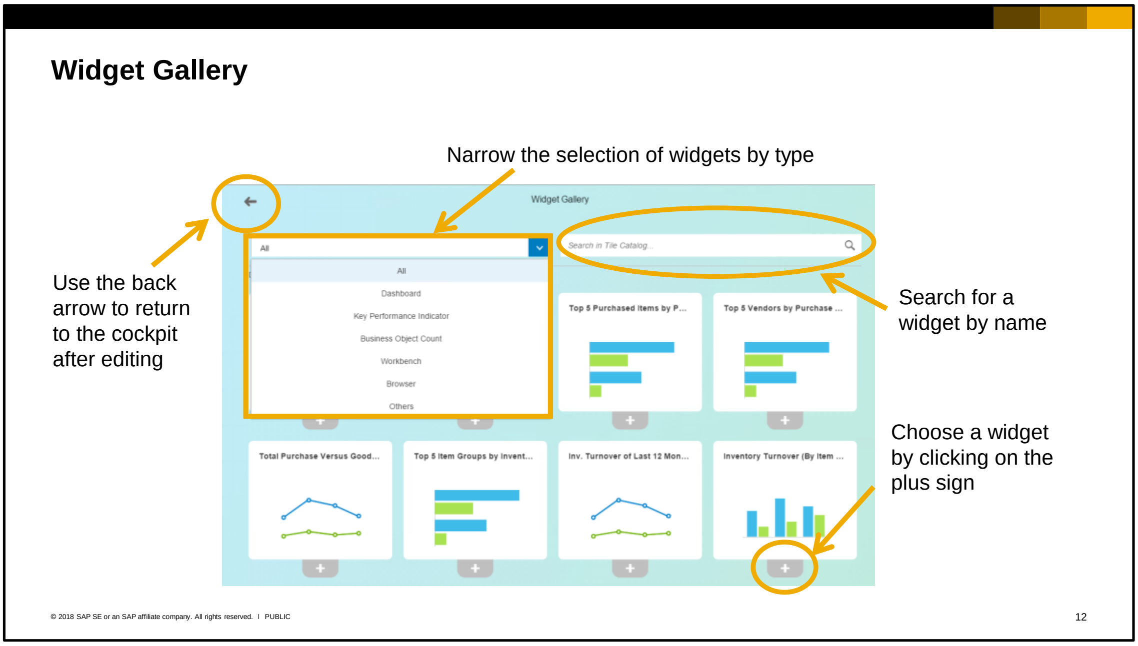
- Choose widgets by clicking on the plus symbol below each widget
- Then return to the cockpit by using the arrow

Use this icon to finish editing



 11

You can personalize your cockpit to better organize your work environment so that essential analytics and daily functions are organized in an immediate and visualized way.
In this course we focus on how to personalize the Fiori-style cockpit.
You change the widgets in your cockpit at any time. You can move, add or delete widgets.
Choose the pencil-shaped icon and the cockpit grays out allowing you to edit. You can drag unwanted widgets to the trash can or rearrange the widgets on the screen.
The plus-shaped icon will appear once you have begun to edit the cockpit. Choose this icon to open the Widgets Gallery. The Widgets Gallery contains all your available widgets. Find the widget you want then click on the plus symbol below the widget to add it to your cockpit.
When you finish editing choose the checkmark.



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

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

Once you find a widget you want, choose the plus icon below the widget. After you have chosen all the widgets you want, use the back arrow to return to your cockpit.

Let’s look at the types of widgets available to you in the Fiori-style cockpit.

Cockpit Widget Types

Operational Widgets

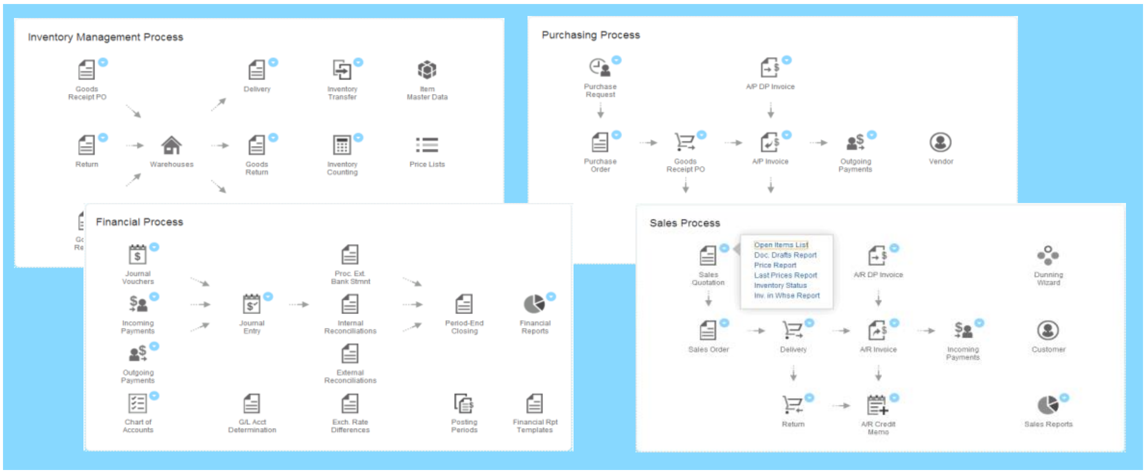
- **Workbenches**
- **Common Functions**
- **Messages and Alerts**
- **My Recent Updates**
- **Business Object Count**

Analytic Widgets

- **Dashboards**
- **Key Performance Indicators (KPIs)**

- There are 5 styles of operational widgets and 2 styles of analytic widgets.
- The Workbench widget is designed to cover 80% of daily operations for a user's role. Users can click on icons depicting frequently used transactions for a business process. This widget can simplify onboarding new users.
- For additional transactions a user needs on a daily basis, you can use the Common Function widget which allows you add a list of transactions that can be opened with a click.
- The My Recent Updates widget displays a user's most recent transactions, so a user can easily see and quickly access recently saved documents or master data.
- The Messages and Alerts widget shows any messages or alerts directed to that user.
- The Business Object Count widget shows the number of items returned from a query. For example, a count might display the number of high value customers who contributed to at least 10% of the profit in the prior year.
- A user can add multiple Dashboard widgets to a cockpit. Users have the choice of a great many pre-delivered dashboards but you can also add dashboards created specifically for your company.
- The KPI widget allows you to quickly spot whether or not you have achieved your target for a key performance indicator, such as sales targets or gross profit margin. The value shown in large type, the color and the up/down arrow make it easy to see if a target is reached and how the values are trending. A user can have multiple KPIs in a cockpit.
- In the following we will go through more details on some of these widget types. Then see how you might combine them in a cockpit.

Four Standard Workbench Widgets



 14

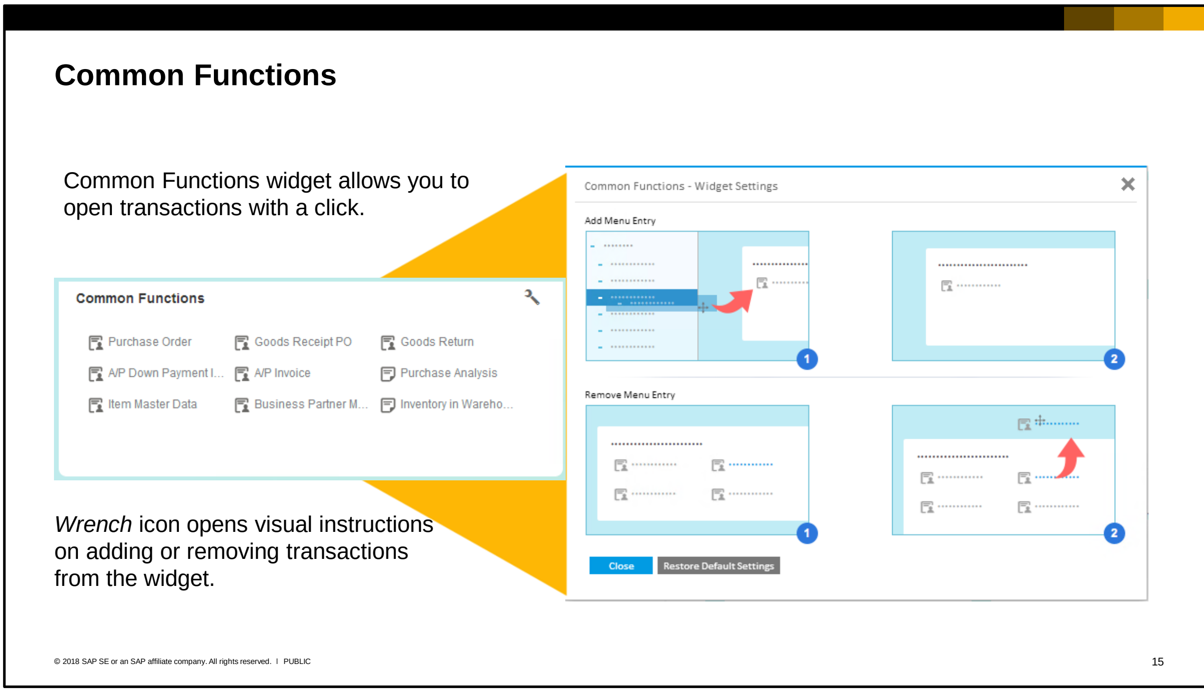
SAP delivers four standard workbench widgets for business process roles in inventory management, purchasing, financials and sales.

Each widget has a visual outline of the majority of transactions needed for a user in that business process role. For example, the financial workbench focuses on the transactions a financial user needs: payment processing, journal entries, accessing accounts, internal and external reconciliation, the posting periods process and financial reports.

In addition to the business process transactions, each workbench also enables a user to take actions right away without having to switch among functions or modules. Context menu options are available for each visual transaction with a blue dot. For example, from the sales quotation in the Sales Process workbench, you can view the open items list, open a list of draft documents, and view price reports or inventory status.

The workbenches are also customizable to meet the needs of your business.

In our new role on the team, we will begin by adding the Sales Process Workbench.

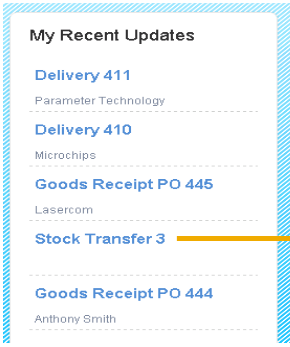


For some common transactions that we plan to use that are not covered by the Sales Workbench, we will add the Common Functions widget. The Common Functions widget allows you to open transactions with just one click.

Once you add the widget, you can choose which transactions to add. Just click on a desired menu item and drag it into the widget. To remove transactions just drag them off the widget. The *Wrench* icon opens visual instructions on adding or removing transactions.

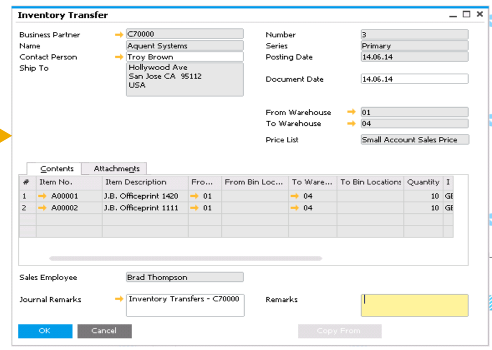
For our business example, we will add the following transactions to the widget:. Item Master Data, Purchase Order, Good Receipt PO, and A/P Invoice.

Recently Updated Objects Widget



- Widget gives a list of a user's recent transactions
- Includes marketing documents, master data, accounts and more

Click on an item on the list to view the transaction

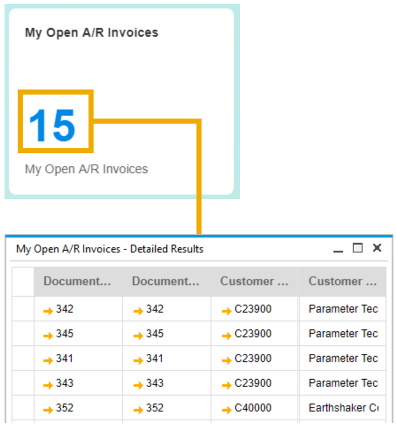


16

We will also add the My Recently Updated widget so that we can easily pull up objects that we are working with. This widget will display new and updated master data, marketing documents, chart of accounts and many more types of information.

As you perform your daily work, the recent updates widget captures your recent transactions. You can click on the a document to open the transaction to view it and make changes if needed.

Business Object Count Widget

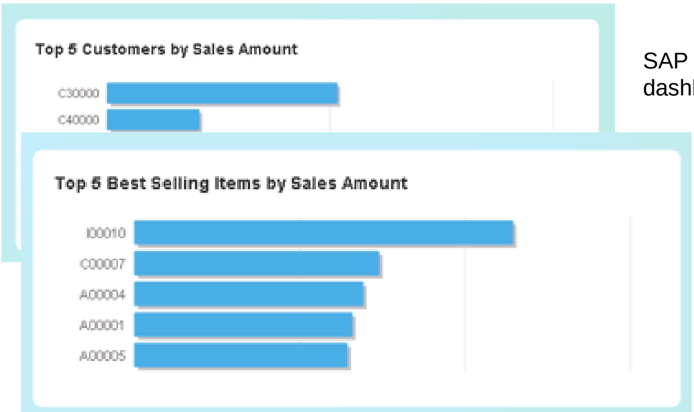


- Displays the number of results from a query
- Predefined widgets exist to count:
  - Sales Orders Not Delivered
  - Open A/R or A/P Invoices
  - Purchase Orders Not Received
  - Open Inventory Transfer Requests
- You can create your own count widgets.
- From the widget you can open the query results.

 17

A business object count widget displays the number of results from a query. Predefined widgets exist to count Sales Orders not delivered, open A/R Invoices, Purchase Orders not received, open A/P Invoices, and open Inventory Transfer requests.
Additionally, you can create your own count widgets. From the count widget you can open the detailed results of the query to see more details. In this case we can see the number of open A/R invoices in the company and we can dive in to the document or master data by choosing the orange link arrow.

Dashboards

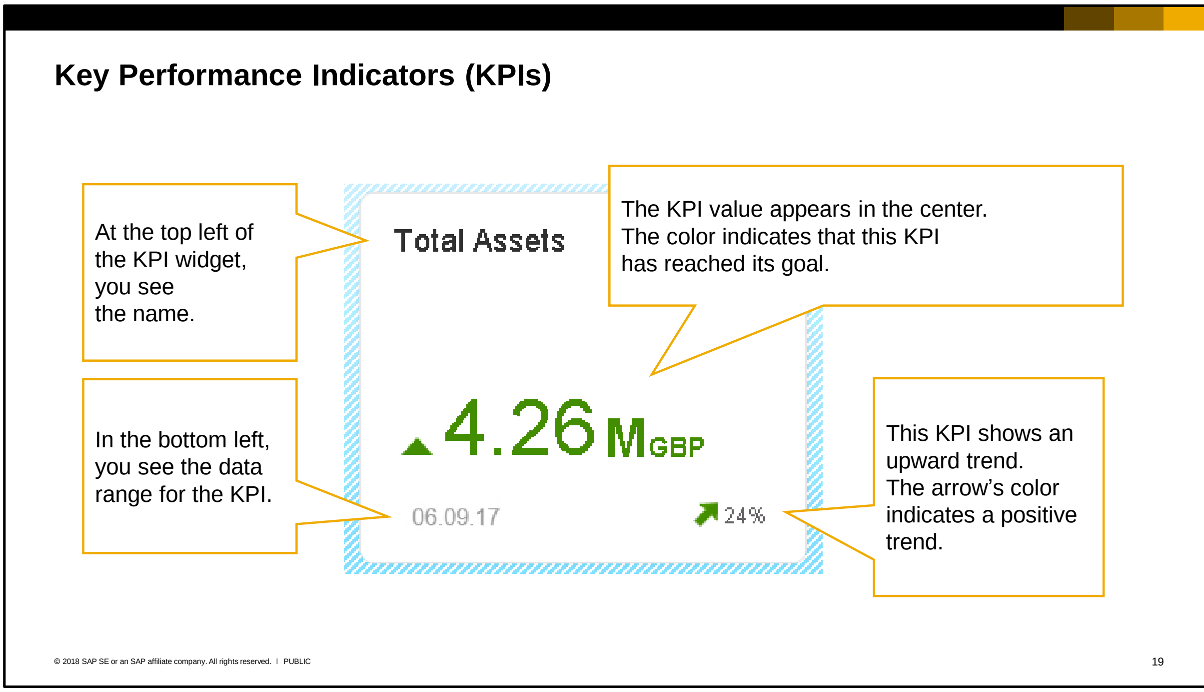


SAP provides a large number of pervasive dashboards.

Authorized users can create their own dashboards and add them to the widgets gallery

Additional actions can be added to dashboards so that users can take immediate action based on analytic insights.

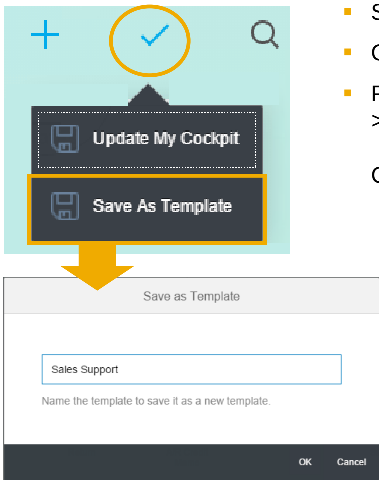
SAP provides a large number of pervasive dashboards with commonly needed business analytics. Authorized users can create their own pervasive dashboards in the Pervasive Analytics Designer. Additionally, Crystal dashboards can be developed and made available to cockpit users.
Additional actions can be added to pervasive dashboards so that users can take immediate action based on analytic insights. These actions include the ability to open an advanced dashboard with related analytics, open a document or master data window and start a related search of the database. Instructions on how to create pervasive dashboards and add actions can be found in the course topic on *Analytics*.
For our cockpit we will add two pervasive dashboards: Top 5 Customers by Sales Amount and Top 5 Best Selling Items.



Several predefined KPI widgets are available for tracking performance objectives. There are two main benefits to using KPIs. KPIs allow you to easily and quickly check progress towards achieving your company's strategic goals and objectives.

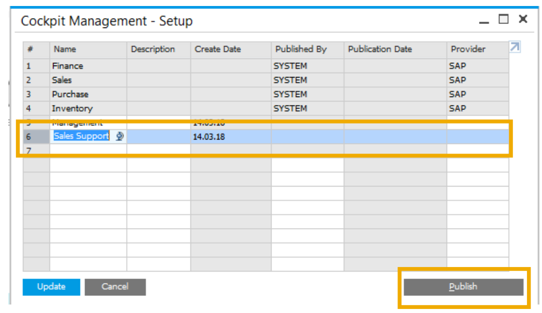
As with pervasive dashboards, authorized users can build new KPIs in the Pervasive Analytics Designer.

Saving a Cockpit



- Save your cockpit design for your own use
- Or if authorized, save as a template
- Publish a cockpit template for others to use: *Tools > Cockpit > Cockpit Management*

Choose *Publish* in the *Cockpit Management –Setup* window



20

Once you have designed a cockpit layout, you can save the cockpit for your own use.
Authorized users can save the cockpit as a template for other users.
If you are authorized you will see two choices when you save the template: “Update My Cockpit” and “Save as Template”.
If you save it as a template, you can publish the template and then assign it to a user group.

Pre-defined Role Based Cockpits

- Four predefined cockpit are available: Sales, Purchasing, Finance and Inventory
- The authorization for the cockpit widgets corresponds with the authorizations for an authorization user group with the same name.

Sales Cockpit	➡	Sales Authorization Group
Purchasing Cockpit	➡	Purchase Authorization Group
Finance Cockpit	➡	Finance Authorization Group
Inventory Cockpit	➡	Inventory Authorization Group

- The predefined cockpits can be modified. You can also create new templates or modify existing templates and save them with a different name.

In addition to cockpit templates that you create, there are four predefined cockpit templates have been created for sales, purchasing, finance and inventory. These cockpits can also be modified by an authorized user.

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

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

A user may have the ability to access and use other widgets based on authorizations in general authorizations that are given to that specific user.

Assigning Users to Roles and Cockpits

Inventory Cockpit → Inventory Authorization Group

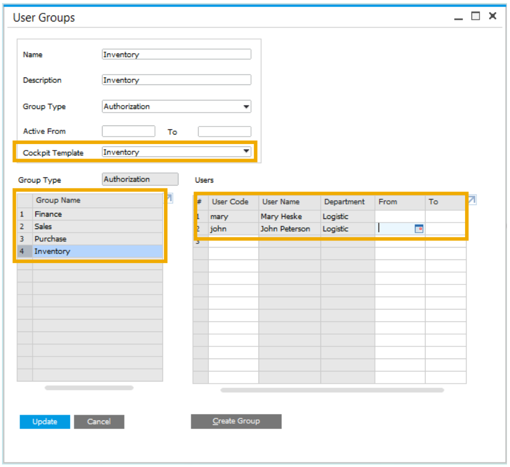
My Workbench:	Transactions in the Inventory Process
Count Widget:	A user’s open inventory transfer requests
My Recent Updates:	List of recent updated transactions
KPIs:	Overall, inbound and outbound inventory value and inventory turnover for the year
Dashboards:	Top 5 Items by Inventory Value, Inventory Turnover of the last 12 months, by item group, by warehouse

By default, the inventory authorization group gives authorization for the inventory cockpit’s widgets.

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

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

Assign Role Authorization and Cockpits to a User



1. Open the *Users Group* window *Administration > Setup > General > User Groups*
2. Choose an authorization group for the role
3. Assign the appropriate cockpit for the role
4. Assign users to the authorization user group
5. Optionally enter date ranges for the user group or users as desired

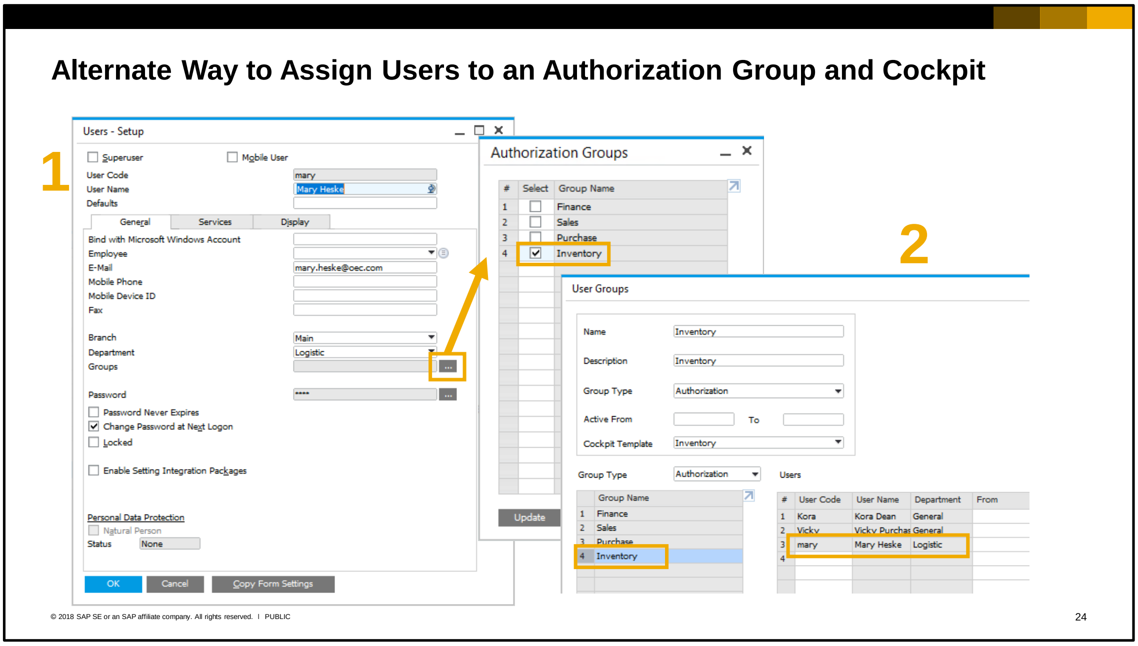
 23

In the User Groups window, the warehouse manager chooses the authorization group that contains the authorizations for the role. In this case, the Inventory authorization group. He ensures the Inventory cockpit template is assigned as the default. Then the warehouse manager assigns two members of his team Mary and John to the inventory authorization group.

Users can personalize their cockpits once the template is assigned. A user may have the ability to access and use other widgets based on authorizations in general authorizations that are given to that specific user.

If you are superuser, you can create new authorization groups if needed for your new templates. Remember that new groups will need to have the appropriate authorizations for the objects and data in the template you assign.

How to set up authorizations is covered later in the e-learning course on General Authorizations.

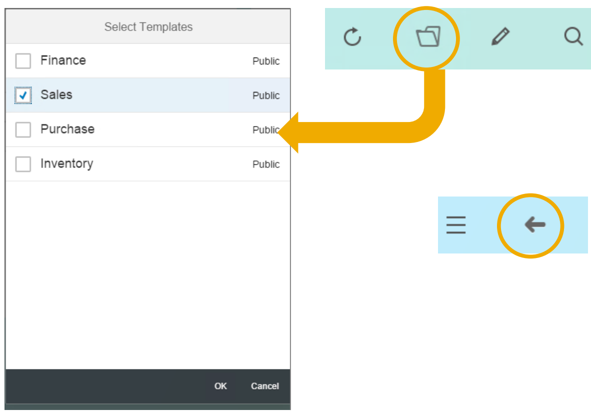


Another way to assign users to a cockpit template is to open the Users-Setup window and add the user to an authorization group that has an associated template.

Then the user will appear in the *User Groups* window as assigned to the group.

You can only assign one default template for a user group, but a user can belong to multiple user groups and thereby be authorized for multiple templates.

Switching Between Available Cockpit Templates



- Users can switch between available cockpit templates
- To choose a template, click on the Folder icon and select from a list.
- To switch to a different template, choose the back arrow in the top left corner of the cockpit.
- This action returns a user to a blank cockpit and the *Folder* icon reappears.

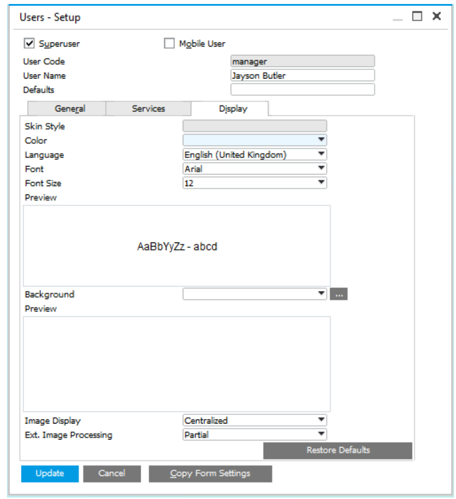
Users have the option to switch between available cockpit templates for which they are authorized. To choose a cockpit template, click on the *Folder* icon and select from a list of templates.
To switch to a different template, choose the back arrow in the top corner of the cockpit. This action returns a user to blank cockpit and the *Folder* icon reappears.
Users can also modify available cockpit templates for their own user or publish them as cockpits that can be shared by other users.

Personalized Display Settings

Users can make their own display settings in the *Users – Setup* window on the *Display* tab.

- Skin style
- Colors
- Language
- Font style and size

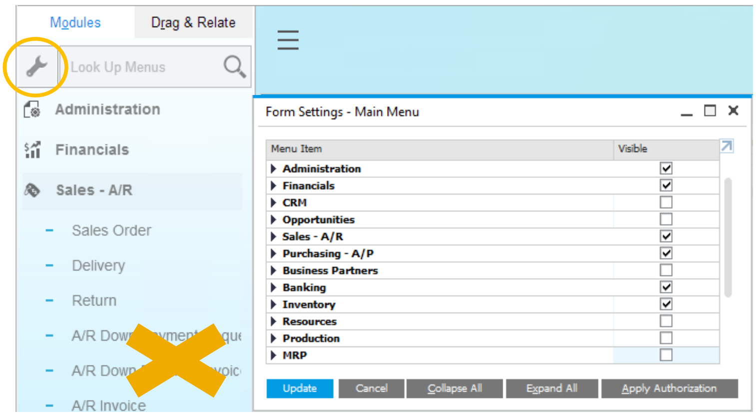
Use the icon on the toolbar 

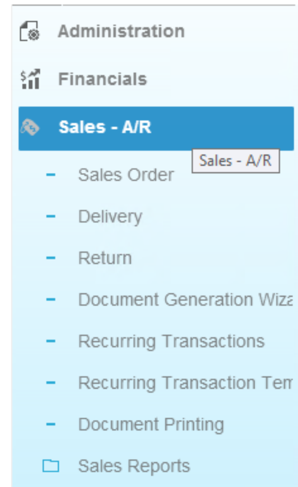


Some settings in the *User-Setup* window can maintained by individual users.
For example, users can personalize their own display settings on the *Display* tab. Settings include those for the skin style, colors, language, font style and size.
Users can open their own user settings by using the *My Personal Settings* icon (as shown on the graphic).

Simplifying the main menu

A user can hide or display entries in the main menu using the *Form Settings – Main Menu* window





 27

Another way to tailor SAP Business One to a user is to simplify the main (Modules) menu.
Most users are limited in the functions they can perform. To avoid frustrations, users can hide menu functions that they do not or cannot use.
Like a personalized cockpit, this can speed up access time to open a regularly used transactions.
The tool to control what is hidden and what is display is called *Form Settings*.
To access the form settings for the main menu, select the *Wrench* icon of the left of the *Menu Search* field.
You will see a list with all the menu items. You can choose to hide or display a whole menu or selected menu items.
In the *Form Settings - Main Menu* window, choose the *Apply Authorization* button. This restores to the menu to its original state.
To save the changes, choose the *Update* button.
In the example the user has removed some entries under the Sales - A/R menu.

Summary

- A company is represented as a database inside SAP Business One.
- There are two types of users: superusers and normal (end) users.
- A horizontal menu bar displays at the top of the screen and the main Modules menu is on the left.
- Commonly-used menu bar functions are represented as icons in a toolbar.
- A menu search allows you to quickly find items in the Modules menu.
- Users can personalize a cockpit to suit their needs. Users can rearrange, delete or add widgets from a widget gallery.
- Using authorization groups with an assigned cockpit template is an easy way to assign role based cockpits. Authorized users can modify or create new cockpit templates and authorization groups.
- Users can change their display settings opening My Personal Settings.
- Users can hide menus and items in the Modules menu by using Form Settings.

A company is represented as a database inside SAP Business One. When you log into SAP Business One, you choose the company to log into.
There are two types of users: superusers and normal (or end) users. Superusers have access everything. End user are restricted by authorizations to functions related to their jobs.
There are two menus. A horizontal menu bar displays at the top of the screen and the main Modules menu is on the left.
Commonly-used menu bar functions are also represented as icons in a toolbar. The toolbar appears under the menu bar.
A menu search allows you to quickly find items in the Modules menu.
Users can personalize their cockpit to suit their needs. Users can rearrange, delete or add widgets from a widget gallery.
Using authorization groups with an assigned cockpit template is an easy way to assign role based cockpits. Four delivered role-based cockpit templates that map to four authorization groups provide widgets tailored to a user’s daily operations and analytic needs.
Authorized users can modify or create new cockpit templates and authorization groups.
Users can change their display settings opening My Personal Settings.
Additionally users can hide menus and items in the Modules menu by using Form Settings.