



Business Intelligence

SAP Business One 9.3



Analytical Portal (1/2)



SBODEMOGB All Reports manager

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Purchasing Expand All

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Customer Relationship Management Expand All

Sales Opportunities Report

Stock Expand All

Inventory by Item Group per Warehouse

Stock Valuation Method Report

Sales Expand All

> Multi-Document Scenarios

Single Document Transactions

Annual Sales Analysis (by Quarter)

Monthly Customer Status

Financials Expand All

> Budget and Cost Accounting

Financial Accounting

> Management Accounting

SBODEMOGB Report Scheduling manager

All Reports

Favourite Reports

Report Scheduling

Search

No filters selected

Scheduled Task	Report Name	Category	Type	Creation Time	Action
Monthly Customer Status	Monthly Customer Status	Sales	Crystal	2017-07-14 13:27:53	
Purchase Analysis	Purchase Analysis Report	Purchasing	Excel	2017-07-14 13:27:05	
Opportunity Report	Sales Opportunities Report	Customer Relationship Man...	Excel	2017-07-14 13:25:28	
Sales Analysis	Annual Sales Analysis (by Q...	Sales	Crystal	2017-07-14 13:08:25	

Feature

- Ability to publish and share documents via the Analytical Portal for:
 - Crystal Reports
 - MS Excel
- Access the Analytical Portal via this URL:
<https://<hana-server>:<Port>/Portal>
- Ability to access the Analytical Portal for every user but only authorized reports are being displayed
- The authorized documents can be downloaded or run in different formats:
 - MS Excel – PDF, Excel or HTML
 - Crystal Reports – PDF
- It is not necessary to have an SAP Business One Client or MS Excel installed on client side.
- The documents can be run on different devices such as a web client or mobile device.
- On Premise and On Demand users are supported.

Analytical Portal (2/2)



Report Name	Scheduled Task	Type	Run Time	Status	Parameter	Remarks	Action
Annual Sales Analysis (by Quarter)	Sales Analysis	Crystal	2017-07-14 1...	Success	Document Ty...	Generate rep...	Download, Refresh
Annual Sales Analysis (by Quarter)		Crystal	2017-07-14 1...	Success	Document Ty...		Download, Refresh

Feature

- Favorite Reports tab appears when a minimum of one report is marked as a favorite.
- Documents can be downloaded directly, or scheduled (daily, weekly, monthly) and sent via mail.
- Report runs (scheduled or manual) are saved in the Report History area:
 - Information like report name, type, start date time, run status etc. are listed.
 - The report result can be downloaded and viewed.
 - The maximum number of report results for each report scheduling task can be configured.

Benefit

- Provides an overview of scheduled reports and historical data.
- Documents can be scheduled and are available on different devices.



New Cockpit Templates 1/2



Welcome, Jayson Butler. You are in cockpit of OEC.Computers.UK.

Sales Process

```
graph TD
    SQ[Sales Quotation] --> SO[Sales Order]
    SO --> D[Delivery]
    D --> RI[A/R Invoice]
    RI --> ARI[A/R DP Invoice]
    RI --> A/R Credit Memo
    ARI --> IP[Incoming Payments]
    ARI --> A/R Credit Memo
```

Select Templates

<input type="checkbox"/>	Finance	Public
<input checked="" type="checkbox"/>	Sales	Public
<input type="checkbox"/>	Purchase	Public
<input type="checkbox"/>	Inventory	Public
<input type="checkbox"/>	My Sales Cockpit	Public
<input type="checkbox"/>	Start Cockpit	Private

Feature

- New Cockpit Templates available for Finance, Sales, Purchase and Inventory
- Users can create own Cockpit Templates and set them as Public
- Selection of available Cockpit Templates via “Select Templates” button
- Choose the template which should be shown

Benefit

- Possibility to create different views
- More flexibility
- Create different Cockpit views for different roles or for test purposes

by Sales Amount

Update My Cockpit

Save As Template

All in 30 Days

From

New Cockpit Templates 2/2



The image shows two overlapping SAP dialog boxes. The background window is 'Cockpit Management - Setup' with a table of cockpit templates. The foreground window is 'User Groups' with a 'Create Group' button and various input fields.

#	Name	Description	Create Date	Published By	Publication Date	Provider
1	Finance			SYSTEM		SAP
2	Sales			SYSTEM		SAP
3	Purchase			SYSTEM		SAP
4	Inventory			SYSTEM		SAP
6	My Sales Cock		05.07.17	manager	05.07.17	IT
11	Start Cockpit		19.07.17			
13						

User Groups Dialog:

- Buttons: Create Group, OK, Cancel
- Select Type: Authorization
- Name: Sales
- Description: Sales
- Group Type: Authorization
- Cockpit Template: Sales
- Users table:

#	User Code	From	To
1	Kora		
2	Vicky		
3	brad		
4	john	John Peterson Logistic	
5	alex	Alex Torras	General
6			

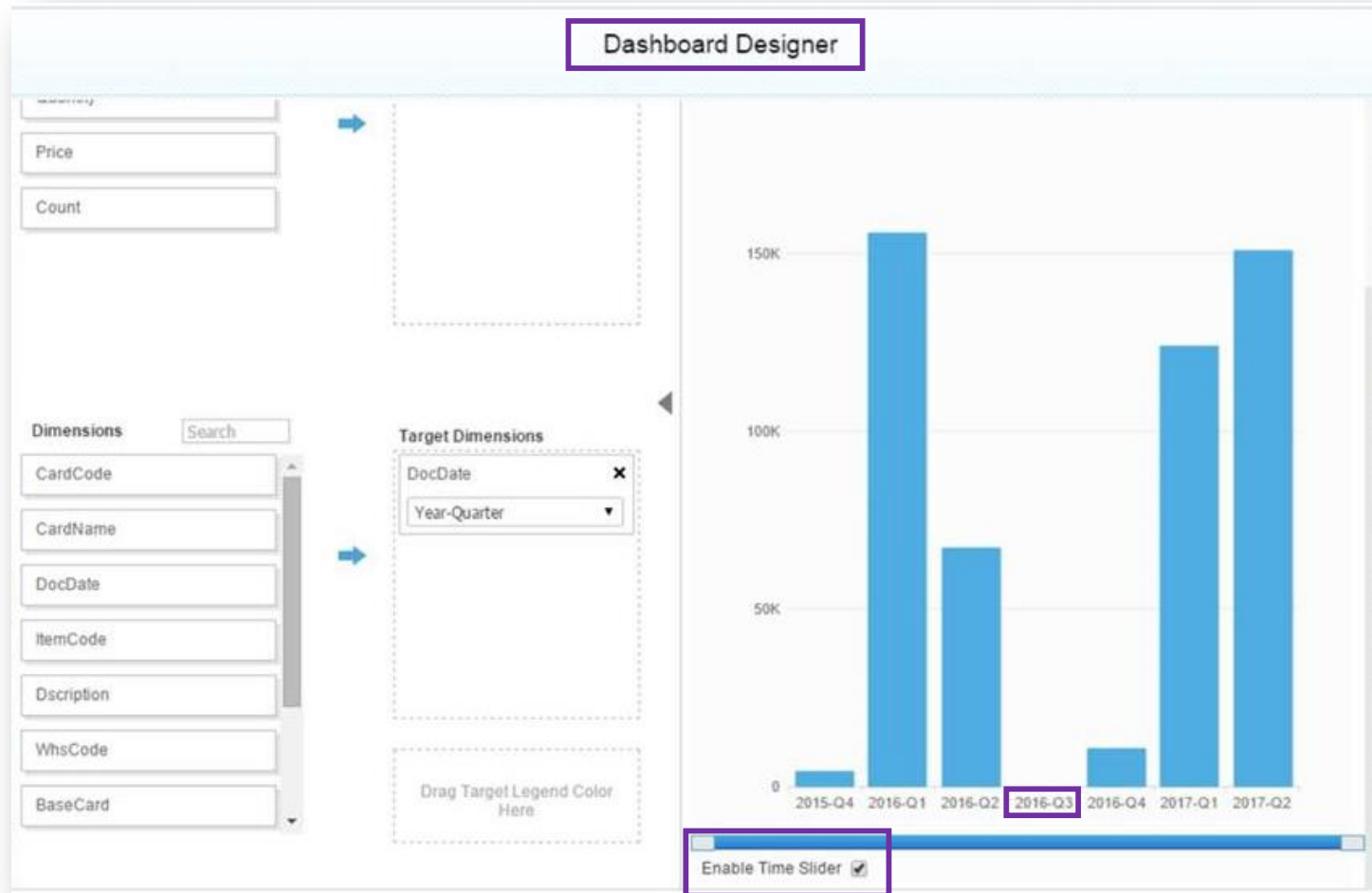
Feature

- Newly created Cockpit Templates can be published to all users
- To do this special authorization is necessary
- Cockpit template can be assigned by a power user to special user groups
- For each system authorization group a default Cockpit Template is available
- Only one template can be assigned to one default authorization group

Benefit

- Possibility to create different Cockpit views
- Central template management and assignment

Pervasive Analytics Dashboard Designer



Feature

- User can enable the Time Slider function.
- After enabling Time Slider, empty data records are shown in the Dashboard.
- Empty data records are shown as zero.

Benefit

- All units of time (day, month, week, year etc.) are shown in the Dashboard.
- Provides an overview of the whole time frame including records shown as zero with no interruption.