



15 Minute Tip Talk – June 21, 2018

My Cockpit and User Controlled Settings

Background

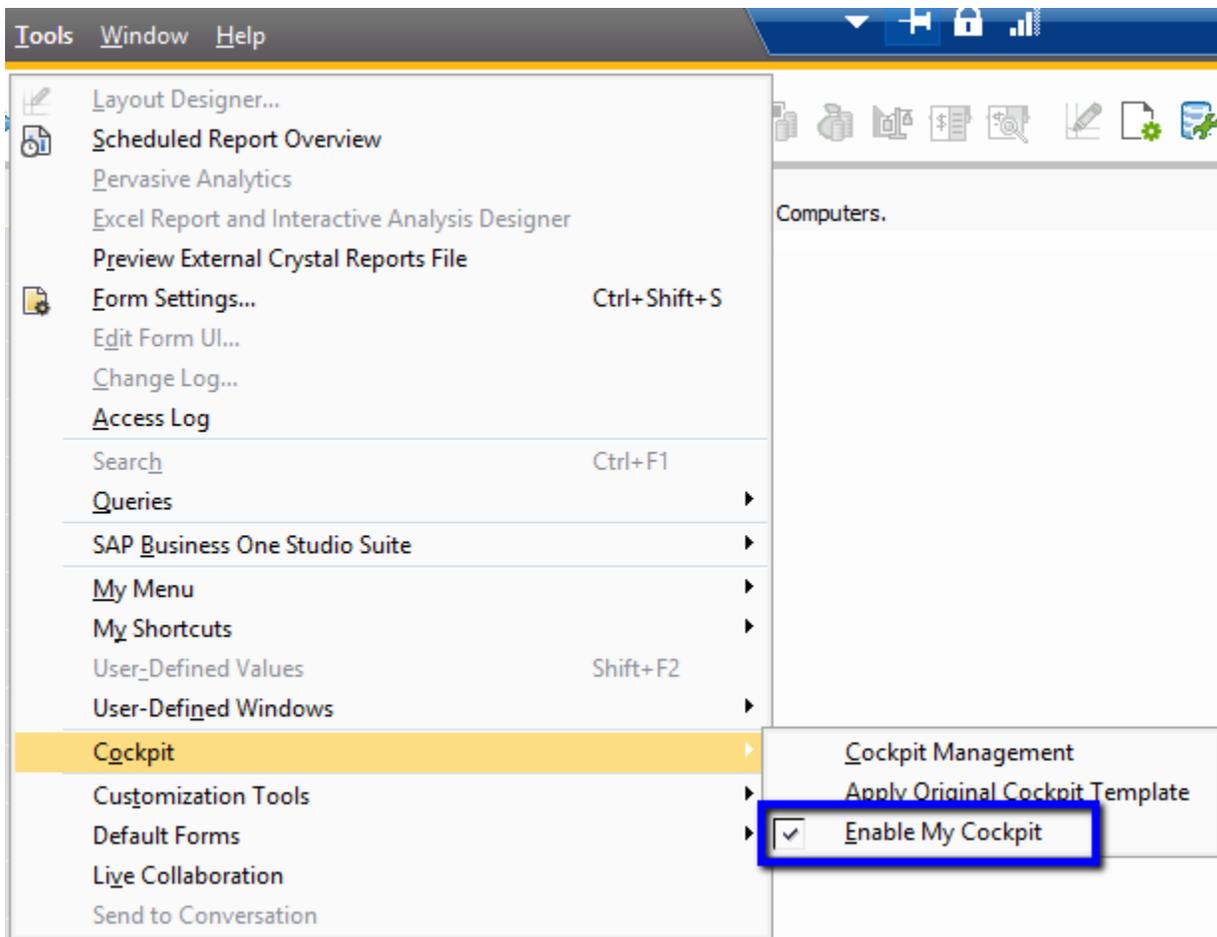
If you specialize in a particular function, you may access certain documents and features more than others. SAP Business One's cockpit allows you to view, search, and organize your work in a single section, so that you no longer need to navigate the traditional menus to access data and functionalities whenever you need access.

Requirements

In order for users to start using the cockpit, the cockpit must be enabled at the company level in Administration > System Initialization > General Settings > Cockpit tab:



Once it has been enabled in General Settings, individual users (with the correct authorizations) can enable the cockpit under Tools > Cockpit



Notes regarding mutual exclusivity:

1. If you are using B1 Usability Package dashboards, you must disable the cockpit at a company level for the dashboards to function properly
2. Enabling My Cockpit precludes you from using My Menu (which allows you to save shortcuts to queries)

Working with Cockpits

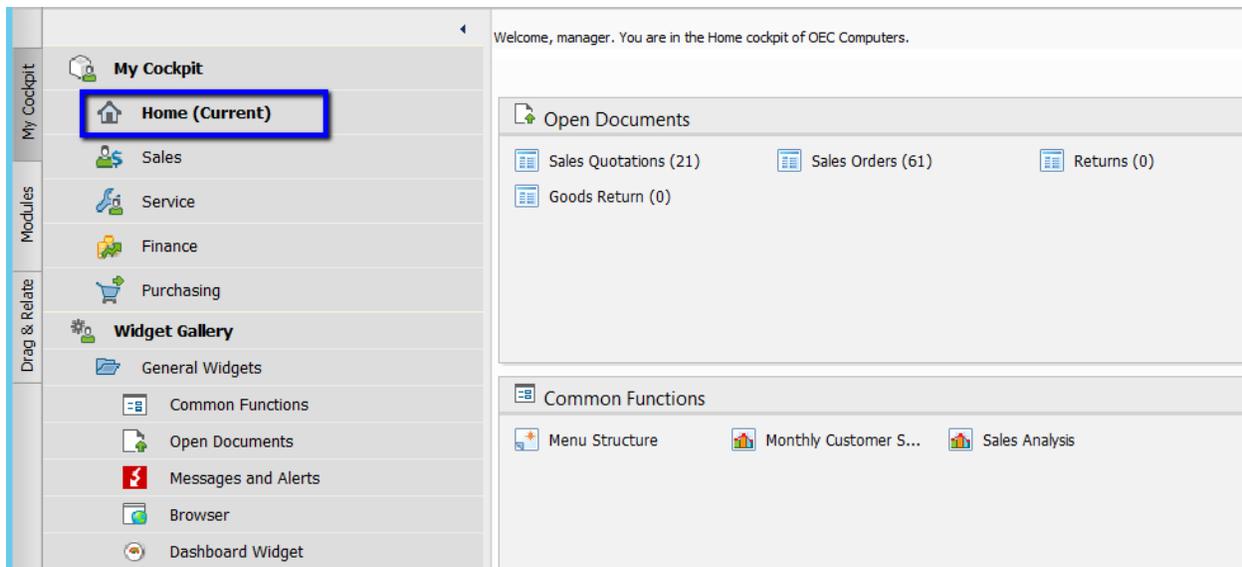
In addition to the Home Cockpit, which is the default you will see upon logging in, SAP Business One comes with three predefined cockpits: Sales, Service, Finance, and Purchasing. The screen will display (*Current*) next to the cockpit you are currently accessing.

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You can modify each of these cockpit settings to fit your needs.

Widgets

SAP Business One provides five types of widgets to help users build and maintain their workspace:

- Common Functions
- Open Documents
- Messages and Alerts
- Browser
- Dashboard Widget

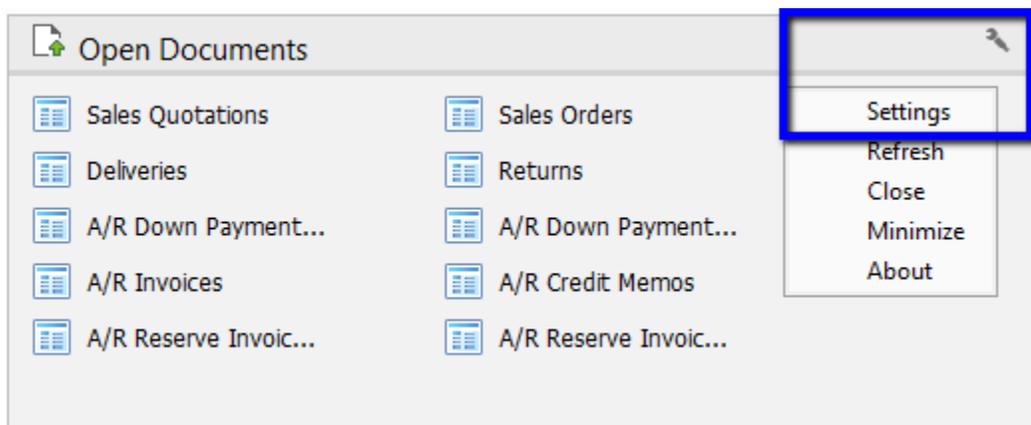
Adding Widgets

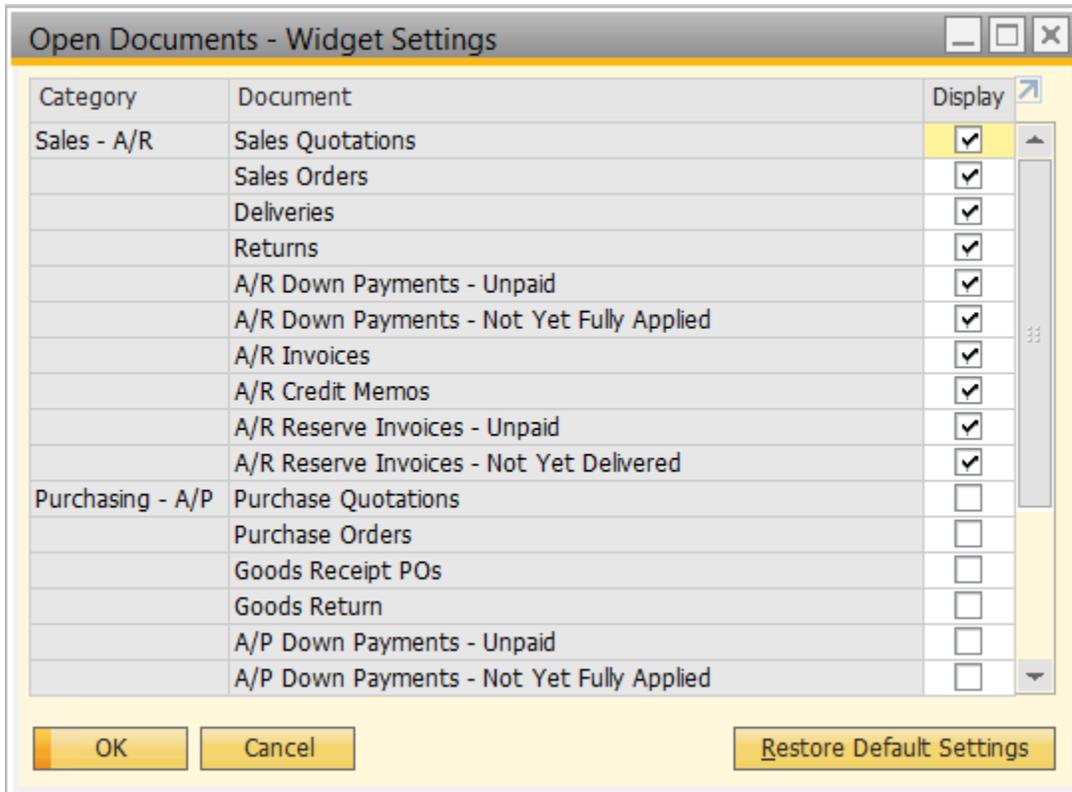
You can add widgets simply by dragging and dropping the widget from the Widget Gallery to the main panel of the cockpit. There will be a grey outline over the area in which the widget will be placed.



Customizing Open Documents

Open Documents can further be customized to show the documents you need. You can click on the Wrench icon and select Settings to select the documents you would like to display.

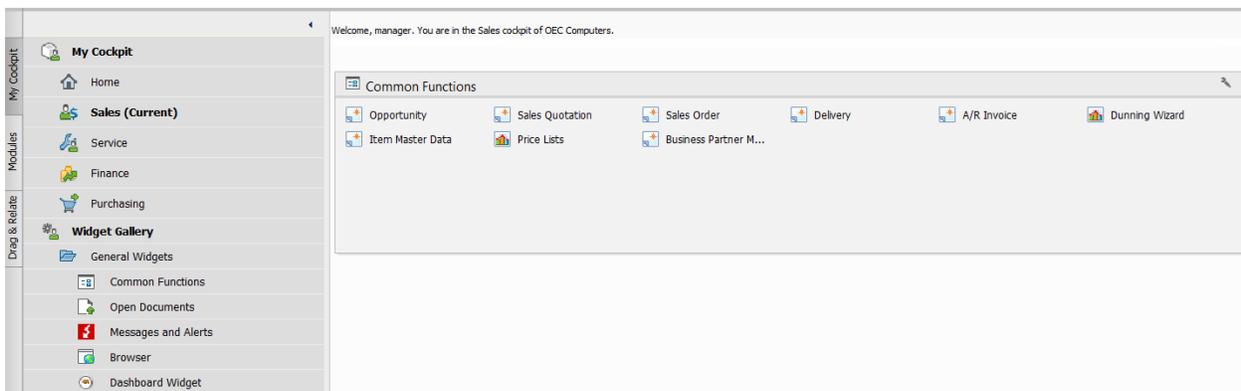




Note that any open document can be added to any cockpit type, therefore a Sales cockpit can contain open documents other than sales.

Common Functions

Common Functions are perhaps the most versatile feature of the SAP Business One cockpit, as they allow you to place any feature accessible through the traditional menu in your cockpit. This includes data, documents, and reports. To add a common function, add the common function widget to your cockpit.



Then simply drag and drop a window from the Main Menu into the Common Functions widget in your cockpit.

