

# 역할 기반 콕피트

## SAP Business One on HANA 9.1

May 2014



This course explores the options available in the new role-based cockpit available for SAP Business One on HANA.

## 목표

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이 토픽을 마치면 다음 가능:

- 새로운 역할 기반 콕피트의 장점 나열
- 역할 기반 콕피트를 사용자에게 할당
- 콕피트의 기능 사용
- 사용자를 위해 콕피트 개인화
- 계산 위젯 커스터마이징

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

- List the advantages of the new role-based cockpit
- Use the functions in the cockpit such as the role-based workbench
- Assign a role based cockpit to a user
- Personalize the cockpit for a user by choosing widgets from the widget gallery
- Customize the cockpit by creating a new count widget

## 새로운 역할 기반 콕피트



### 개선:

- 재무, 재고, 구매, 및 판매를 위해 사전 정의된 역할 기반 콕피트.
- 개별 역할별로 디자인된 분석 위젯
- 다양한 위젯 갤러리
- 모바일 기기에서 재사용할 수 있는 HTML5 인터페이스

### 효과:

- 사용자의 권한 그룹 기반으로 콕피트 자동 할당
- 신규 사용자에게 역할 기반으로 기능 교육 용이.

필수적인 분석 및 기능을 즉각적이고 시각적인 방식으로 조직화

SAP Business One release 9.1, provides role-based cockpits predefined for finance, inventory, purchasing and sales. Selected analytics widgets designed for each role are included in each cockpit. These analytics provide valuable information for a user's daily operations and decision-making. Additional widgets can be added from a widget gallery with all the available variations. The HTML5 interface, which uses SAP's Fiori concept, is available for personal computers, tablets and mobile devices.

The role-based cockpits are automatically assigned to users based on the user's permission group. Since the cockpit is designed for a user's role, it becomes even easier to train new users on the functions that are common to their role. This results in an enhanced user where essential analytics and daily functions are organized in an immediate and visualized way.

## 비즈니스 사례



OEC Computers의 창고 관리자는 창고 재고, 재고 금액 및 매출액에 대한 핵심 성과 지표에 대한 빠른 개요와 이전 요청을 추적할 수 있는 콕피트가 필요합니다.

창고 스태프의 이직율이 높아서 신규 팀 스태프를 쉽게 교육할 수 있는 콕피트가 필요합니다.

모든 사용자는 작업에 필요한 정보를 가지고 책임 영역에 집중할 수 있도록 가장 자주 사용하는 기능을 한 곳에서 접근할 필요가 있습니다.

이 새로운 역할 기반 콕피트에서 이 옵션을 제공합니다.

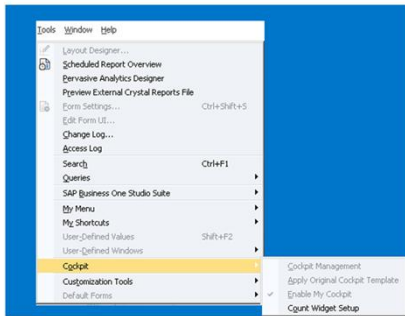
The Warehouse Manager of OEC Computers needs a cockpit that gives his team a quick overview of their warehouse stock, key performance indicators for inventory values and turnover, and a way to track transfer requests.

There is a high turnover in the warehouse staff, so he needs a cockpit that makes training new team members easier.

Each user needs their most frequently used functions in one place so that they can focus on their responsibility with the necessary information to their jobs

The new role based cockpit provides these options.

## 새로운 콕피트 활성화



- 새로운 역할 기반 콕피트는 SAP Business One 9.1 version for SAP HANA의 기본값입니다.
- 사용자-인터페이스는 새로운 룩앤필로 변경되었습니다
- 이 콕피트 스타일로 변경하는 옵션:  
*운영관리 > 시스템 초기화 > 일반 세팅 > 콕피트 탭*
- 회사 레벨에서 설정하면 새로운 콕피트는 자동으로 사용자 레벨에서 활성화됩니다.

The new role-based cockpit is automatically activated as the default cockpit for SAP Business One 9.1, version for SAP HANA.

When you use this cockpit, the user interface of SAP Business One is changed to a new look and feel, different from the traditional look.

You have the choice of using the new cockpit and user interface style or returning to the more traditional style. This can be done at two levels. You can enable and disable the cockpit at either the company level or the user level. For example, an authorized user could decide which interface will be used for the entire company. The setting is found on the *Cockpit* tab of the *General Settings* window. Any change takes place at the next logon. When the new cockpit is chosen, it is automatically enabled at the user level.

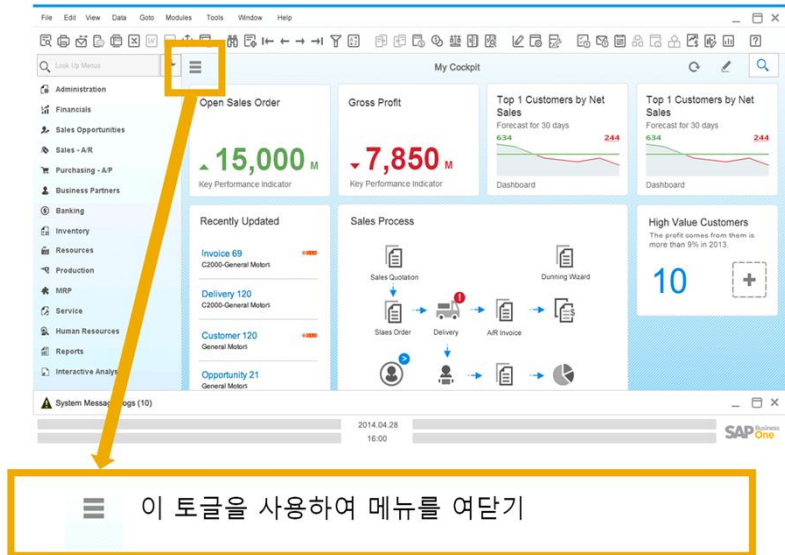
At the user level, an individual user can decide whether to use a cockpit or not. Their decision will not affect other users. This is done in the Cockpit window in the Tools menu. Users do not have a choice of which style of cockpit to use, only whether or not to use a cockpit.

Both of these paths are the same paths for activating a cockpit as in prior releases, the only difference is the additional option of choosing the new Fiori-

style role-based cockpit.

## 사용자 인터페이스

- HTML5 기반 GUI
- 오른쪽에 콕피트 위젯
- 우측 상단에 엔터프라이즈 검색
- 상단에 콕피트를 개인화할 수 있는 버튼
- 왼쪽에 접을 수 있는 메뉴



Once a user has activated their cockpit, they will see the Fiori-style graphical user interface based on HTML5.

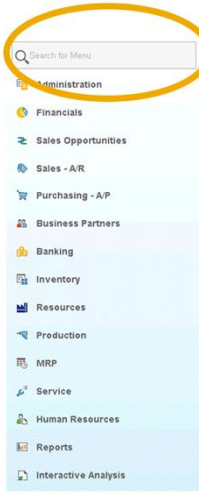
Cockpit widgets appear in the right of the window. We will discuss these more in detail later.

The Enterprise Search is opened by choosing the magnifying glass icon, shown here on the top right of the window. Initially, the Enterprise Search icon appears in that spot. However, you have the option to move the search function to anywhere in the window by dragging the gray area to the left of the search box.

Buttons for personalizing the widgets in the cockpit appear just to the left of the search icon, on the top of the window.

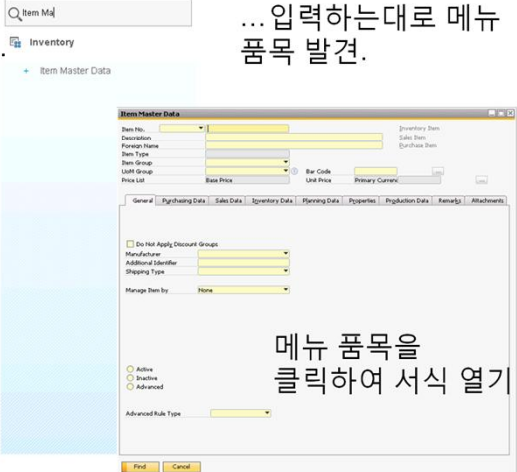
A collapsible menu resides on the left. The icon with 3 horizontal lines in the top left corner is a toggle to open and close the menu.

## 메뉴 검색



메뉴 항목을 찾기 위해  
메뉴 검색을 사용 가능...

... 입력하는대로 메뉴  
품목 발견.



메뉴 항목을  
클릭하여 서식 열기

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When the menu is open, 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.



## 검색 능력 향상



돋보기 아이콘을 사용하여 엔터프라이즈 검색 열기

Search Result

Record 1-10 of 170 resources

Search for "A1000"

AP Credit Note - 8

AP Invoice - 87

AP Invoice - 9

Look Up Data

Template

History

A1000

battery

Tablet

Search Template

Template Name: A1000

Save Cancel Remove

삼각형 아이콘으로 검색 이력이나 사용 가능한 템플릿 보기

자주 사용하는 검색어를 템플릿으로 저장  
별표 아이콘으로 템플릿 윈도우 열기  
템플릿 이름을 입력하고 저장

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In release 9.1, the Enterprise Search function has been improved. Open the Search function by using the magnifying glass icon.

As before, you start the Enterprise Search by typing into the search box.

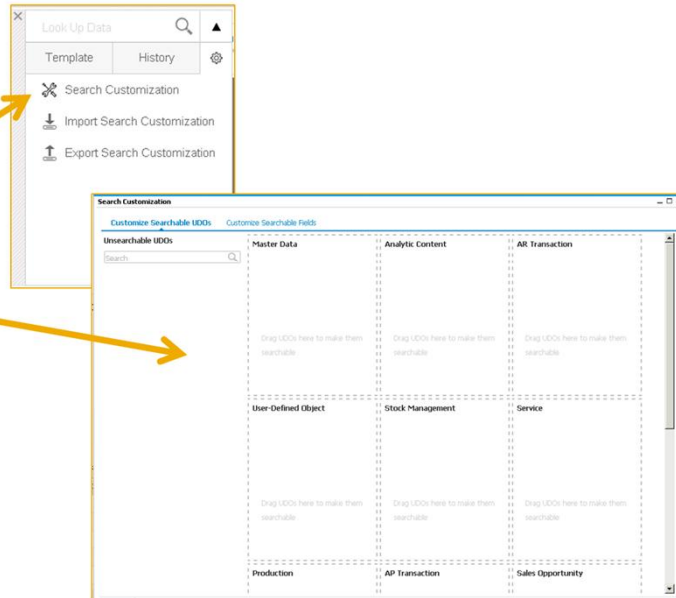
One new feature is the option to save a frequent search by creating a search template. Use the star-shaped icon to open the Search Template window. Just give it a name and save the template for later use. The star-shaped icon will turn yellow after a template has been saved.

When you want to use that search again, just use the triangular drop down icon to choose your saved template. Templates can be edited or deleted as needed. The triangular dropdown icon also brings you to a History tab that saves your prior search history.

## 사용자-정의 오브젝트를 검색에 추가

사용자-정의 오브젝트 (UDO)를 엔터프라이즈 검색에 추가 가능

- 검색 커스터마이징 윈도우 열기
- UDO를 검색 결과 범주로 드래그
- 사용자-정의 필드를 검색에 추가
- **엑스포트** 옵션을 사용하여 설정 백업 저장

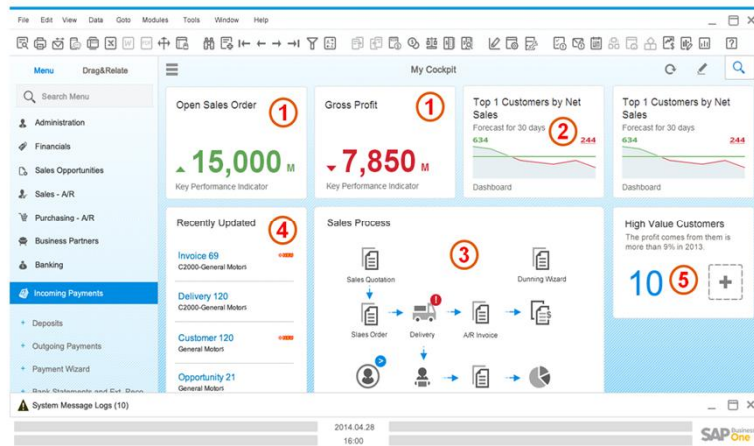


You can add user-defined objects to the Enterprise Search. To open the Search Customization window, open the Enterprise Search, choose the Settings icon on the far right tab. On the tab you have three options: setting up search customization, importing the search customization and exporting search customization.

In the window you can drag a user-defined object from the Unsearchable UDOs area into one of the categories. This will control under which relevant search results display. Once you add a UDO, then you can customize searchable user-defined fields. Then when you perform an enterprise search, you will be able to display results for data related to these user-defined objects and fields.

After finishing the customization it is recommend you use the Export Search Customization option to save a backup of the configuration.

## 분석 및 운영 위젯



### 위젯 - 분석

① KPI  
핵심 성과 지표에 달성하였는지 빠르게 전달

② 대시보드  
퍼베이션스 분석

### 위젯 - 운영

③ 내 워크벤치  
일상 업무의 80%를 커버하여 신규 사용자 교육 간소화

④ 최근 업데이트  
최근 트랜잭션 표시

⑤ 계산  
질의 결과값 표시

- Let us spend a moment to discuss what types of widgets are available in the role-based cockpit.
- There are five basic types of widgets found in the cockpit, regardless of the role.
- One new type of widget available as of release 9.1 is the KPI widget. This 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.
- The second type of analytic widget is one that has been available for awhile, the dashboard. As before, the dashboards can be created in either the SAP Business One's designer tool or in Crystal Reports. What's new is that a larger number of pervasive analysis dashboards are prebuilt for your use and customized to common roles.
- There are three new operational widgets in the new cockpit style.
- The My Workbench widget covers 80% of daily operations and simply onboarding new users.
- The Recent Updates widget displays a user's more recent transactions, so a user can easily see their work and access those documents with one click.
- The Count widget shows the number of items returned from a query. In the example shown, the count displays the number of high value customers who contributed to more than 9% of the profit in the prior year.
- In the following slides we will go through each type of widget and how they are used and managed.

## 역할 기반 콕피트 할당

- 위젯이 역할에 상관없이 동일하여도 개별 역할 기본 콕피트별로 일부 변형이 기본값으로 존재합니다.
- 4개의 사전 정의된 콕피트가 4개의 사전 정의된 권한 그룹에 매핑됩니다.
- 사용자는 관련 콕피트에 있는 모든 위젯에 권한을 가진 권한 그룹에 할당됩니다.
- 사용자는 추가 권한에 기반하여 다른 위젯도 접근하여 사용할 수 있습니다.



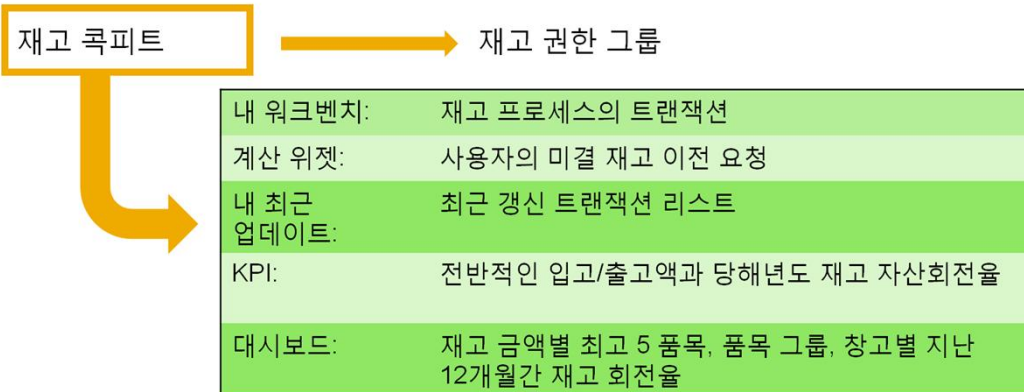
Although the widget types are the same regardless of role, specific variations of widgets are set as the default for each predefined role based cockpits. Four predefined cockpits have been created for sales, purchasing, finance and inventory.

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

Once a user is assigned to a permission 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.

## 사용자를 역할에 할당



재고 권한 그룹은 재고 콕피트 위젯에 대한 전체 권한 부여.

For example, the 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 permission 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. The permission 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

## 사용자를 권한 그룹에 할당

1

The screenshot displays two SAP windows. The 'Users - Setup' window on the left shows the configuration for user 'Mary Heske', with 'Inventory' selected in the 'Permission Groups' dropdown. The 'Permission Groups' window on the right shows the 'Inventory' group selected, with a list of users including 'Mary Heske' and 'John Peterson' assigned to it. A yellow arrow points from the 'Inventory' group in the top window to the 'Inventory' group in the bottom window, and another yellow arrow points from the 'Inventory' group in the bottom window to the 'Users' list.

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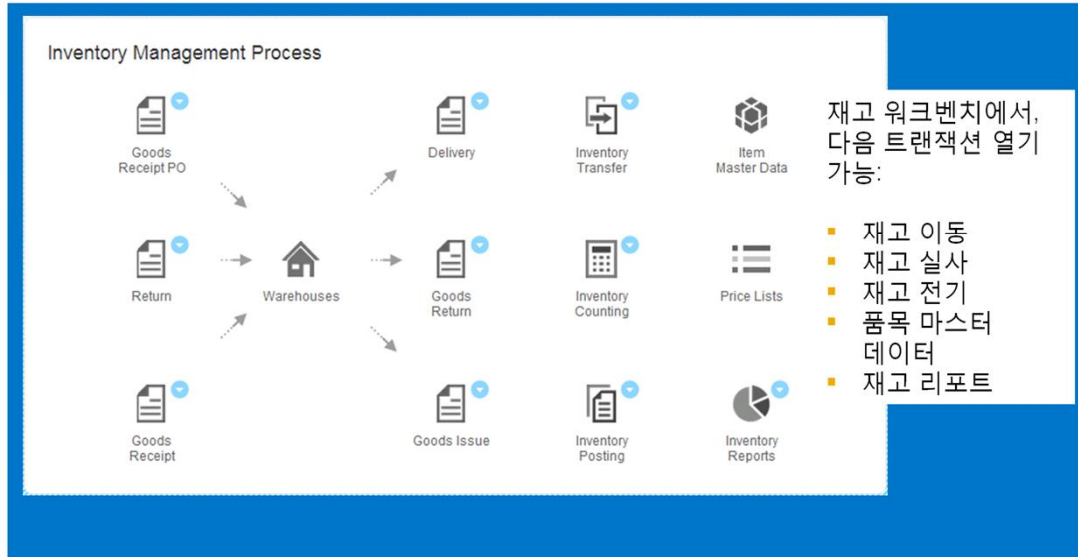
In the *Users-Setup* window, add a permission group to the user profile.

Then the user will appear in the *Permission Group* window as assigned to the group.

Here we see that the warehouse manager has assigned two members of his team Mary and John to the inventory permission group.

Please note that if you add the user to the list in the *Permission Group* window, this does not give the authorization to the cockpit. You must assign the permission group in the *User – Setup* window.

## 재고 워크벤치

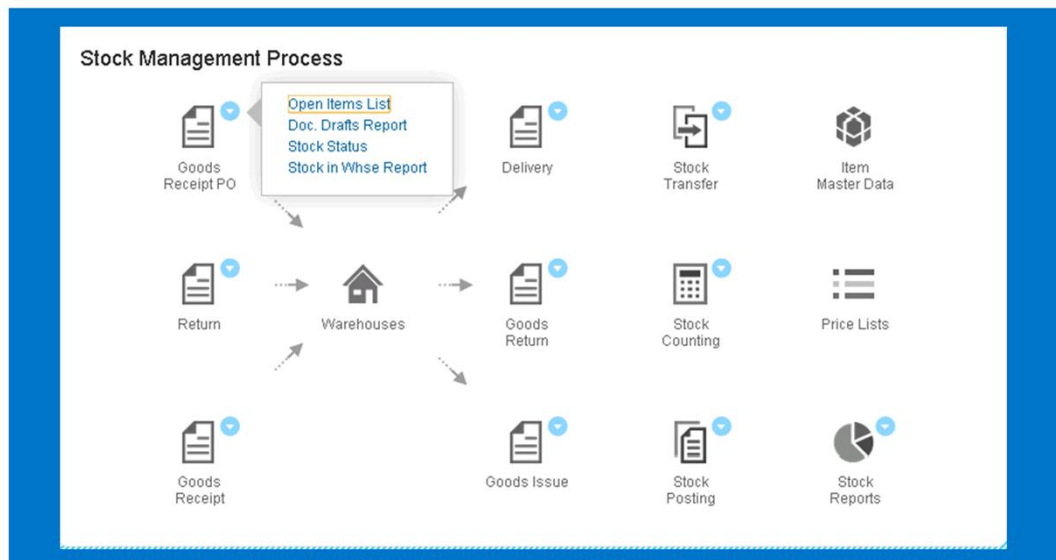


Now we will take a detailed look at each of widget types found in the cockpit, beginning with the workbench.

Here we see the inventory workbench. Inventory management transactions are presented as a standardized and visualized work process.

From this workbench, you can open several goods movement transactions for moving stock items in and out of the warehouse. You can also access transactions for managing inventory counts, item master data, price lists and inventory reports.

## 워크벤치 액션

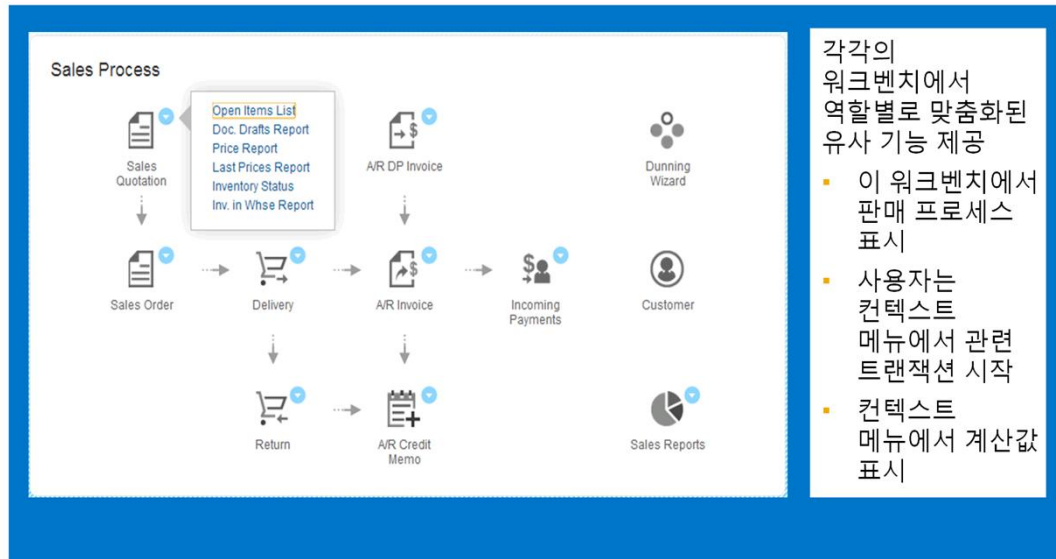


In addition to the business process transactions, each workbench also enables a user to take actions right away without having to switch among functions or modules. Context menu options are available for each visual transaction with a blue dot.

For example, one of the warehouse team members Mary can easily launch actions directly from the workbench to help with her daily tasks. From the context menu for the Goods Receipt PO, she can launch the open items list, the document drafts report, the stock status report and the stock in warehouse report.



## 판매 워크벤치



각각의 워크벤치에서 역할별로 맞춤형 유사 기능 제공

- 이 워크벤치에서 판매 프로세스 표시
- 사용자는 컨텍스트 메뉴에서 관련 트랜잭션 시작
- 컨텍스트 메뉴에서 계산값 표시

The other workbenches provide similar functionality, but tailored to the particular role of the user. Here we see the sales workbench with the sales process visualized. From the sales quotation, a user can launch several actions: viewing the open items list, opening the a list of draft documents, and viewing price reports or inventory status.

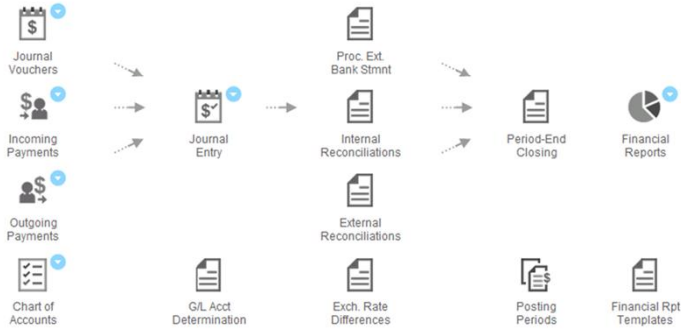
## 재무 워크벤치

재무 워크벤치의  
집중 영역:

- 지급
- 분개
- G/L 계정
- 조정
- 전기 기간
- 재무 리포트

관련 트랜잭션에  
대한 컨텍스트 메뉴

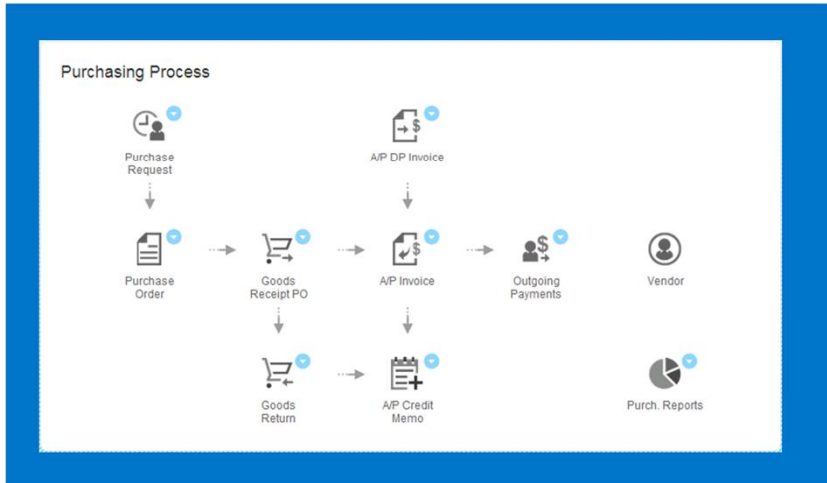
### Financial Process



Similarly, 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. The workbench includes a context menus available for each transaction with a blue dot.

## 구매 워크벤치

구매 워크벤치에서 구매 역할에서 필요한 대부분의 트랜잭션 시각적 표시. 추가적으로 컨텍스트 메뉴에서 관련 트랜잭션을 제공



The purchasing workbench has a visual outline of the majority of transactions needed in a purchasing role.

## 비즈니스 오브젝트 계산 위젯

**Deliveries (Today)**  
Number of Deliveries Today

3

**Deliveries (Today)**

DocNum
412
413
414

**Delivery**

Customer: No. Primary: 412  
Name: Status: Open  
Contact Person: Posting Date: 20.05.14  
Customer Ref No.: Billing Date:  
Local Currency: Document Date: 20.05.14

Item	Quantity	Unit Price	Summ. Type	% Summary
1		0.00	01	

Sales Employee: No Sales Employee  
Owner: Total Before Discount: 0.00  
Discount: 0.00  
Freight: 0.00  
Rounding: 0.00  
Tax: 0.00  
Total: 0.00

Remarks:

Buttons: OK, Cancel

질의로부터 결과 수치 표시

계산을 위한 사전 정의 위젯 존재:

- 미납 판매 오더
- 미결 A/R 송장
- 미입고 구매 오더
- 미결 재고 이전 요청

이 납품 계산 위젯처럼 자신의 계산 위젯 생성 가능

위젯으로부터 다음 가능:

- 질의 결과 열기
- 관련 비즈니스 오브젝트 열기

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, such as the delivery count widget shown in this graphic. We will cover how to do this at the end of this topic.

From the count widget you can open the detailed results of the query to see more details as well as open the window for a related business object. In this case we can see the number of deliveries created today, open a list of those deliveries or the delivery note window.

## 최근 업데이트 오브젝트 위젯

### My Recent Updates

Delivery 411

Parameter Technology

Delivery 410

Microchips

Goods Receipt PO 445

Lasercom

Stock Transfer 3

Goods Receipt PO 444

Anthony Smith

- 위젯에서 사용자의 최근 트랜잭션 리스트 제공
- 마케팅 문서, 마스터 데이터, 계정 등 포함

리스트의 항목을  
클릭하여 트랜잭션  
보기

#	Item No.	Item Description	From...	From Bin Loc...	To Ware...	To Bin Location	Quantity
1	A00001	J.B. Officeprint 1420	01	04	10	GE	
2	A00002	J.B. Officeprint 1111	01	04	10	GE	

Recently Updated widget reflects new and updated master data, marketing documents, chart of accounts and many more types of information.

As Mary does her daily work, the recent updates widget captures her recent transactions. She can click on the Stock Transfer document to open the transaction and view her recent work and make changes if needed.

## cockpit 개인화

업무 환경을 간소화하기 위해 cockpit 개인화 가능. 위젯 이동, 추가 또는 삭제



**이 아이콘을 사용하여 cockpit 편집**

- cockpit 위젯이 흑백모드로 전환
- 불필요한 위젯을 휴지통으로 드래그 가능
- 위젯 재정렬 가능



**이 아이콘을 사용하여 위젯 갤러리 열기**

- 개별 위젯 아래 더하기 심볼을 클릭하여 위젯 선택
- 화살표를 사용하여 cockpit로 복귀



**이 아이콘을 사용하여 편집 완료**



You can personalize the cockpit to better organize your work environment.

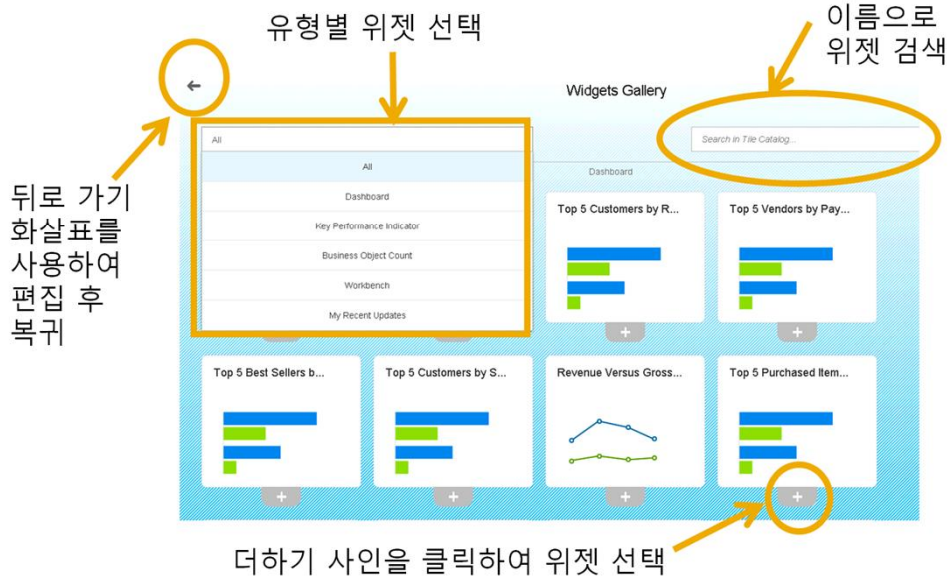
You change the widgets in your cockpit at any time. You can move, add or delete widgets.

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.

## 위젯 갤러리

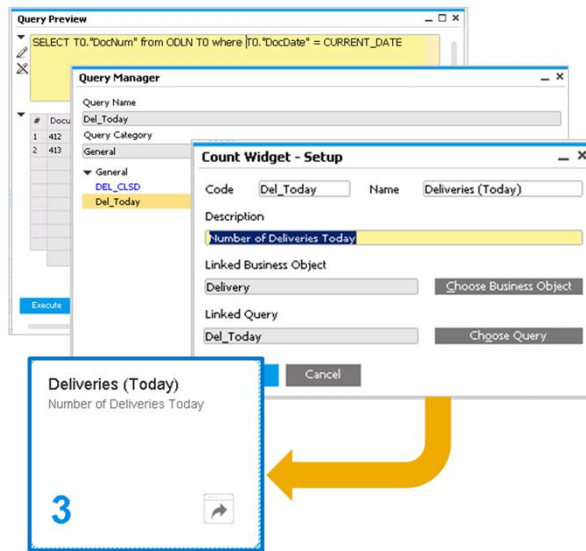


In the Widgets Gallery, the default is to show all available widgets. You can narrow down the selection with the dropdown. Options are to show only dashboards, key performance indicators, count widgets, workbenches or the recent updates widget.

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.

## 새로운 계산 위젯 생성



- 사용자-정의 질의 생성
- 새로운 계산 위젯 셋업:  
틀 > 콕피트  
> 계산 위젯 - 셋업
  1. 계산 위젯을 위한 초기 세팅
  2. 추가로 비즈니스 오브젝트를 위젯에 연결
  3. 계산 근거가 되는 사용자-정의 질의 선택
- 새로운 위젯을 콕피트에 추가

Maria would like to quickly see how many deliveries are created in her warehouse each day. The answer for this need is a new count widget based on a user defined query.

To design a count widget, a user needs full authorization for Count Widget Setup as well as access to an existing user-defined query.

In our case, Mary uses an existing query that finds all the deliveries that are created today in warehouse 01. She then makes the initial settings for the count widget by giving it a code, a name and a description. She links the delivery document to her count widget so that she can open the delivery form from the widget in the cockpit. She chooses the query that finds today's deliveries. When it is attached to the count widget, it will count the number of deliveries that the query returns.

Once the count widget is saved, it will appear in the widget gallery. From there, Mary can easily add it to her cockpit.



## 요약



- 사전 정의된 역할 기반 콕핏에서 사용자의 일상 운영과 분석 필요에 따른 맞춤 위젯 제공
- 표준 위젯에서 대시보드, 핵심 성과 지표, 내 워크벤치, 내 최근 트랜잭션 및 계산 위젯이 포함
- 분석 콕핏를 사용하여 인사이트를 획득하고 위젯 내부의 컨텍스트 메뉴로부터 액션 시작 가능
- SAP의 Fiori 개념을 사용한 HTML5 인터페이스를 개인용 컴퓨터, 태블릿 및 모바일 기기에서 사용 가능
- 일반 세팅에서 콕핏를 모든 사용자에게 활성화 가능
- 권한 그룹을 통해 역할 기반 콕핏가 할당됨
- 사용자는 위젯 갤러리로부터 위젯을 재정렬, 삭제 또는 추가 가능
- 향상된 엔터프라이즈 검색에서 이전 검색 내용 재사용 및 검색에 UDO 사용과 같은 새로운 유연성 제공
- 사용자 정의 질의 기반 신규 계산 위젯 생성 가능

Predefined role-based cockpits provide widgets tailored to a user's daily operations and analytic needs.

Standard widgets include dashboards, key performance indicators, my workbench, my recent transactions and count widgets.

You can use the cockpit analytics to gain insights to your business than launch actions from context menus insight the widgets

The HTML5 interface, which uses SAP's Fiori concept, is available for personal computers, tablets and mobile devices.

You can enable the new cockpit for all users in General Settings. Individual users can decide whether to use a cockpit or not.

Role-based cockpits are assigned via permission groups.

Users can rearrange, delete or add widgets from a widget gallery.

An improved enterprise search gives new flexibility to reuse previous searches from history or saved as templates, and the option to add user-defined objects and fields to your searches.

You can create new count widgets based on user-defined queries



# 감사합니다

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