



Executive Cockpit

for SAP Business One

End-User Manual

Release 2026.10.05-27 · every tab, view and tool, with screenshots

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Contents

1. Introduction

Executive Cockpit is a management dashboard for SAP Business One. It shows finance, sales, operations and people in one place, and every figure opens the accounts, documents and journal lines behind it. This manual explains every tab, view and tool for the people who use the dashboard every day.

The cockpit only reads SAP Business One. Nothing you click in the dashboard changes SAP data. Figures come from SAP Business One on SQL Server or SAP HANA, and from the payroll database when payroll is part of your cockpit.

1.1 What is in the dashboard

Area	Tabs
Overview	Highlights, needs attention, key figures, aging and balances at a glance
Finance	Financials, Audit Trail, Expenses, Budget, BOQ Control (where the BOQ tables exist), A/R Aging, A/P Aging, Advances, Fixed Assets
Sales & customers	Business Partners, CRM, Service, Sales Analysis, Sales & Purchases
Operations	Approvals, Document Flow, Open Documents, Purchase Analysis, Production, Project Control, Inventory
People	Payroll, Employees

Which tabs you see depends on your user rights and your license type. If a tab described here is missing, ask your cockpit administrator (see chapter 9).

About the screenshots: The screenshots show the SAP Business One demo company OEC Computers (SBODemoAU) with a demo payroll database. Its sales documents end in 2020, so some sales charts are empty for recent periods. With your own data every chart fills in.

2. Getting started

2.1 Open the dashboard and sign in

1. Open the cockpit address your administrator gave you in Edge, Chrome, Firefox or Safari, for example `https://SERVER01:8443/`. On the cockpit server itself, double-click the **Executive Cockpit** icon on the desktop.
2. Enter your **User name** and **Password** and click **Sign in**.
3. If you are asked to change your password, choose a new one with at least 10 characters and three of: small letters, capitals, digits and symbols. It must not contain your user name.

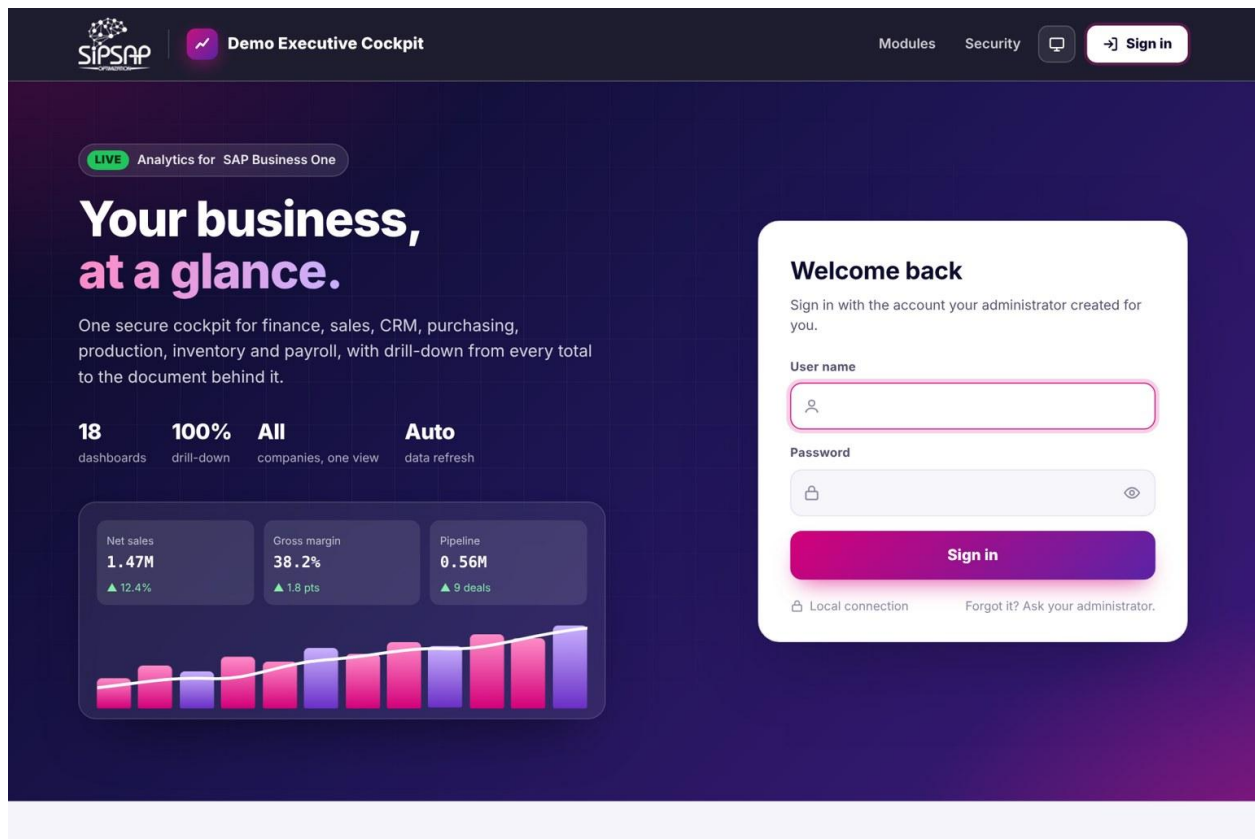


Figure 1. The landing page and sign-in card

Forgot your password? Ask your administrator to set a new one. After 10 failed sign-ins from one computer, sign-in is blocked for 15 minutes. Sessions end after 60 minutes without activity.

2.2 The screen at a glance

The dashboard has three parts: the **header** with the filters that apply to every tab, the **navigation bar** with the areas and their tabs, and the **tab content** below.

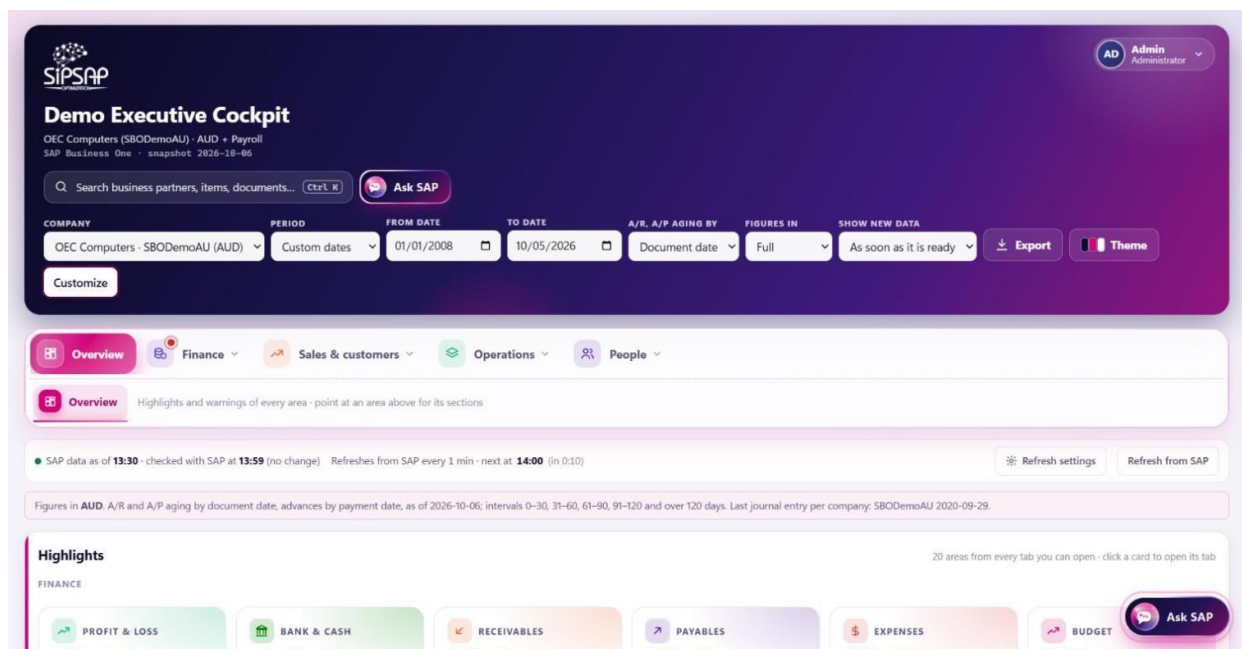


Figure 2. Header, navigation bar and data status

Control	What it does
Search box (Ctrl K)	Finds business partners, items, documents and more across SAP (section 3.4)
Ask SAP	Ask a question in plain words; the answer comes back as a table and chart (section 3.5)
Company	Choose one company, or all companies consolidated (if you may open several)
Period, From date, To date	The date range for the whole dashboard. Pick a preset period or type your own dates
A/R, A/P aging by	Age open items by document date or due date
Figures in	Show amounts in full, in thousands (K) or in millions (M)
Show new data	"As soon as it is ready" refreshes the page by itself when new SAP data arrives; "Only when I reload" keeps the page still
Export	PDF report, Excel workbook or Print of the current tab (section 3.6)
Theme	Light, dark or automatic, and the colour theme (section 3.8)
Customize	Choose which key figure tiles and tabs you see, and their order (section 3.7)
User menu (top right)	Your name and role, default company, change password, sign out and, for administrators, the administration screens

2.3 Moving between tabs

Click an area (Finance, Sales & customers, Operations, People) to show its tabs in the row below. Point at an area to open its menu, which lists every tab with a one-line description. Badges show open amounts, for example the A/R Aging badge shows open receivables, and a red dot marks an area that needs attention.

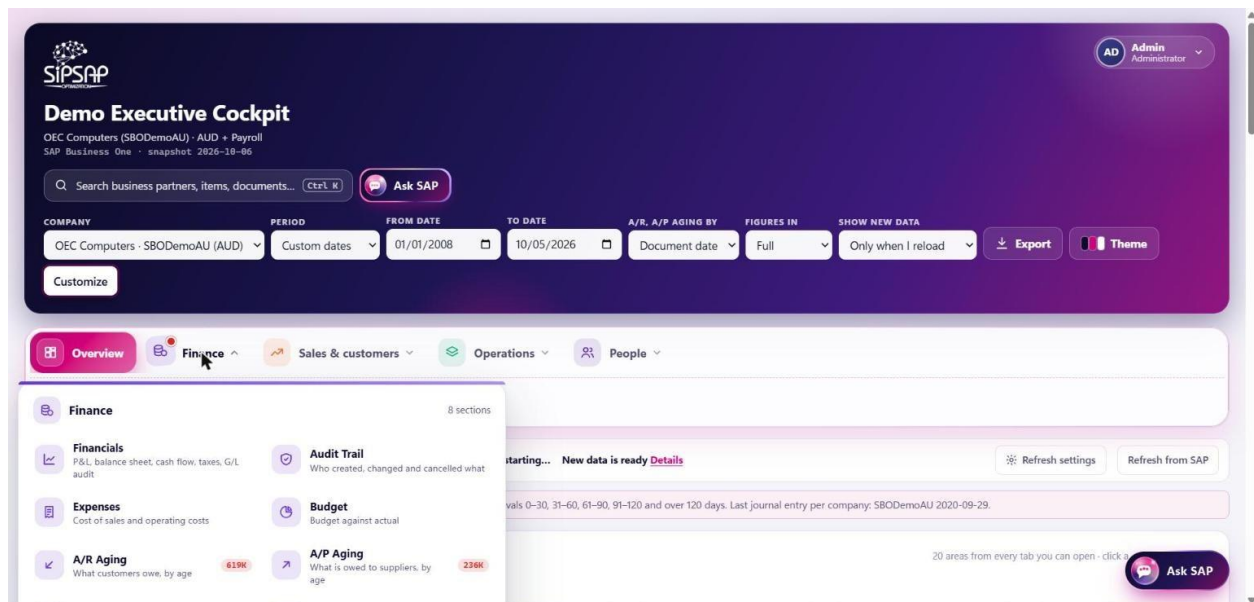


Figure 3. Pointing at Finance opens the menu of its tabs

Each tab has its own address, so you can bookmark a tab, for example `.../#ar` for A/R Aging.

2.4 Data status and refresh

The bar under the navigation shows when the SAP data was last read, when it was last checked for changes and when the next refresh runs. The cockpit reads SAP on a schedule set by the administrator, for example every 15 minutes. Live tabs such as Financials, Audit Trail and Service read SAP directly when you open them; use **Read again** in those tabs to reload.

- **Refresh from SAP** asks the server to read SAP now.
- **Refresh settings** shows the schedule (administrators can change it).
- The line below it states the currency, how aging is calculated and the last journal entry date per company.

3. Working with the dashboard

3.1 Dates, periods and companies

The **From date** and **To date** in the header apply to every tab. Live tabs also show the period in a pink box with quick buttons: **Today**, **This month**, **This quarter**, **This year**, **Last year**, **Last 12 months**. Choosing one changes the header dates for all tabs.

Choose **All companies** in the Company list for a consolidated view in one currency. A company you may not open does not appear in the list.

3.2 Drill down from any figure

Almost every figure, bar, slice and table row can be clicked. A panel opens on the right with the detail behind it, and you can keep clicking down to the original document. Use **Back** to go up one level and **Close** to return to the tab. Each panel has its own **Excel** and **PDF** buttons and a search box that filters every table in it; **Wide** makes the panel full width.

Example: in Financials > Profit & loss, click **Gross Sales Revenue**. The panel lists the accounts behind the line. Click an account to see it by month, then click **Journal lines** for the postings, and a posting for its journal entry and document.

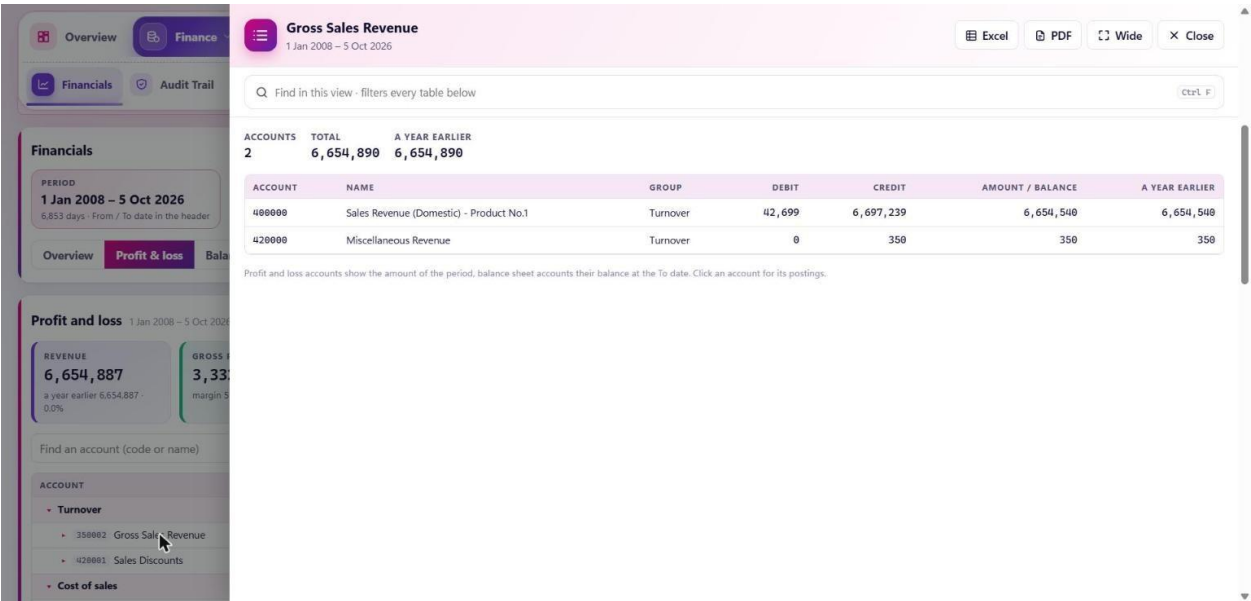


Figure 4. Step 1: the accounts behind a profit and loss line

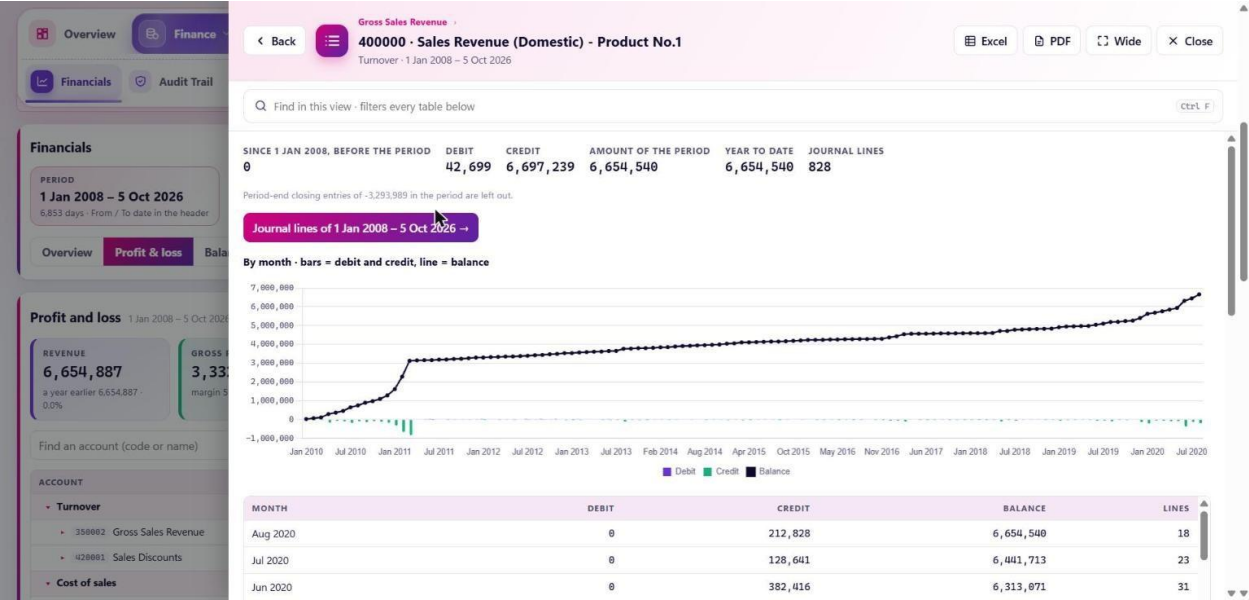


Figure 5. Step 2: one account by month, with its journal lines one click away

3.3 Documents and document flow

Clicking a document opens its header, business partner, totals, remarks, attachments and lines. **Document flow** shows the whole chain, for example sales quotation, sales order, delivery and A/R invoice, with the status of each document (paid, open or unpaid).

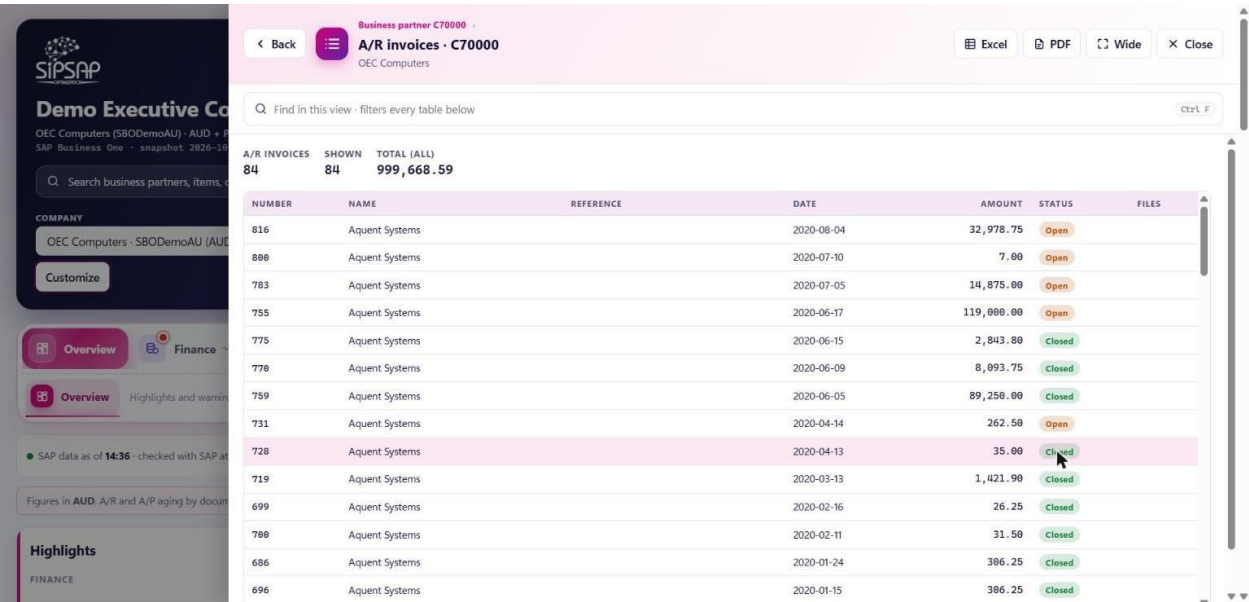


Figure 6. A list of documents opened from a figure

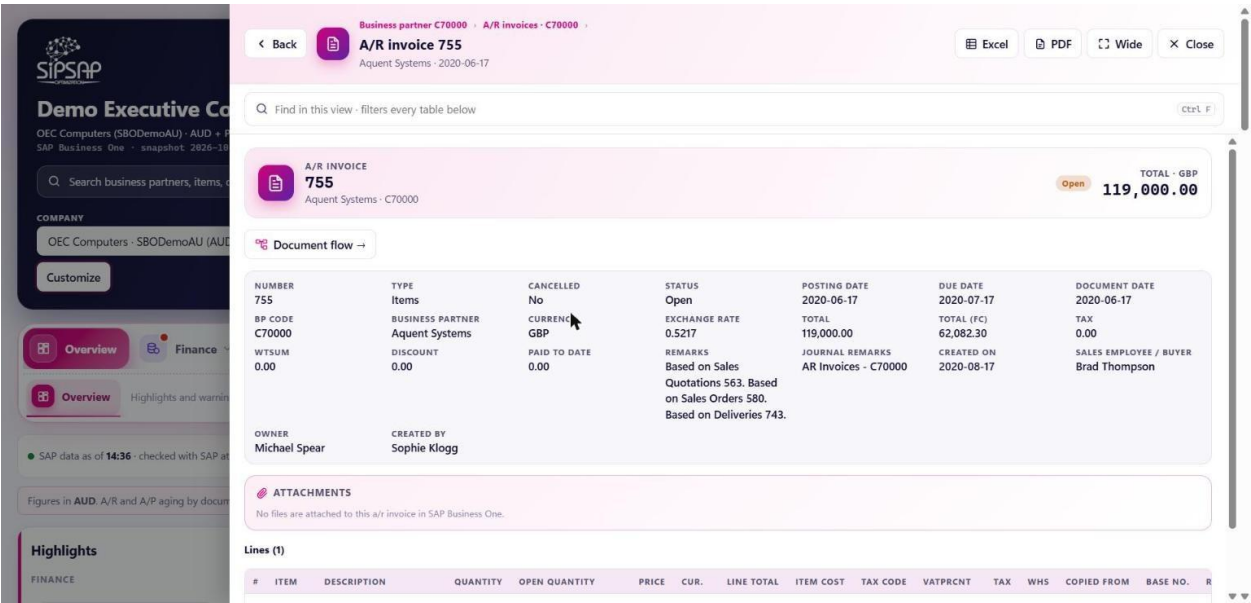


Figure 7. One A/R invoice with its details, attachments and lines

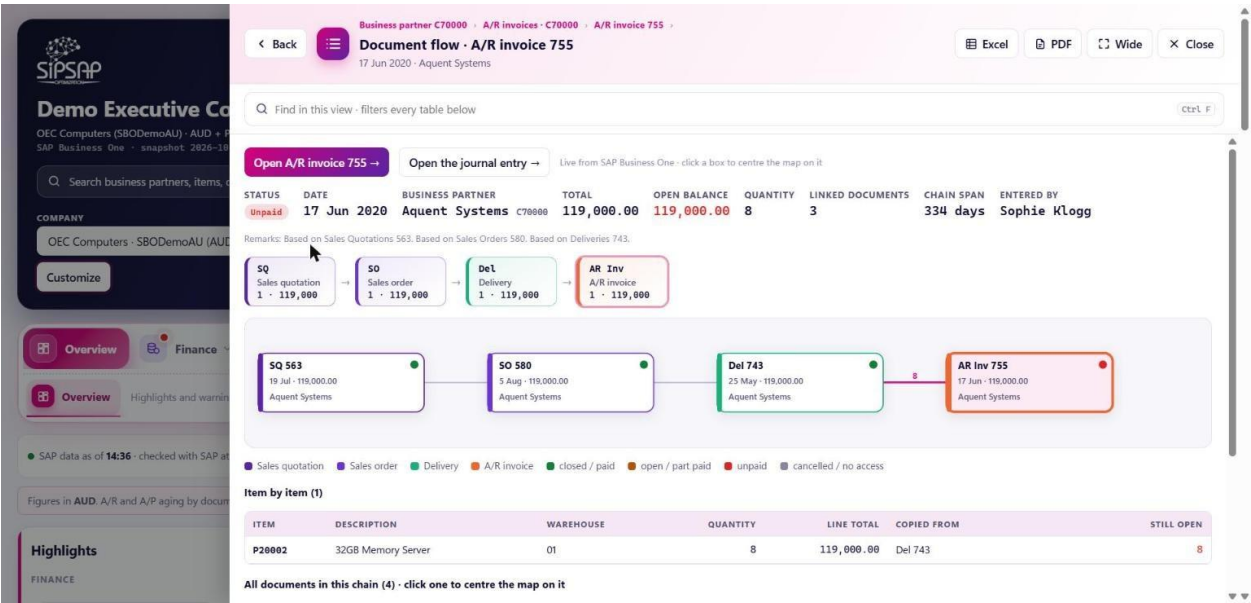


Figure 8. Document flow: from quotation to invoice, with what is still open

3.4 Global search

Click the search box in the header or press **Ctrl K**, then type a name, code or document number. Results are grouped by kind: business partners, items, fixed assets, sales, purchasing, inventory and production, finance and projects, CRM, service and approvals. Use the chips to narrow the search, and tick **All my companies** to search every company you may open. Use the arrow keys and **Enter** to open a result; **Esc** closes the search.

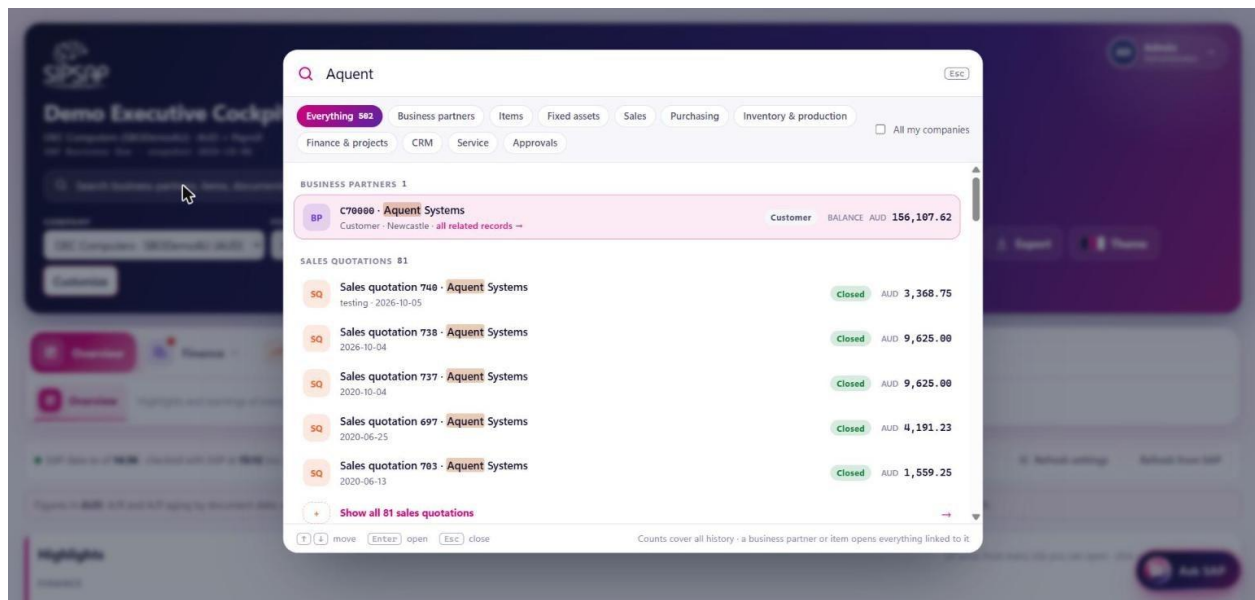


Figure 9. Search results for "Aquent"

Opening a business partner or item shows everything linked to it in SAP Business One: its master data and the number and value of every kind of document, each with **View all**.

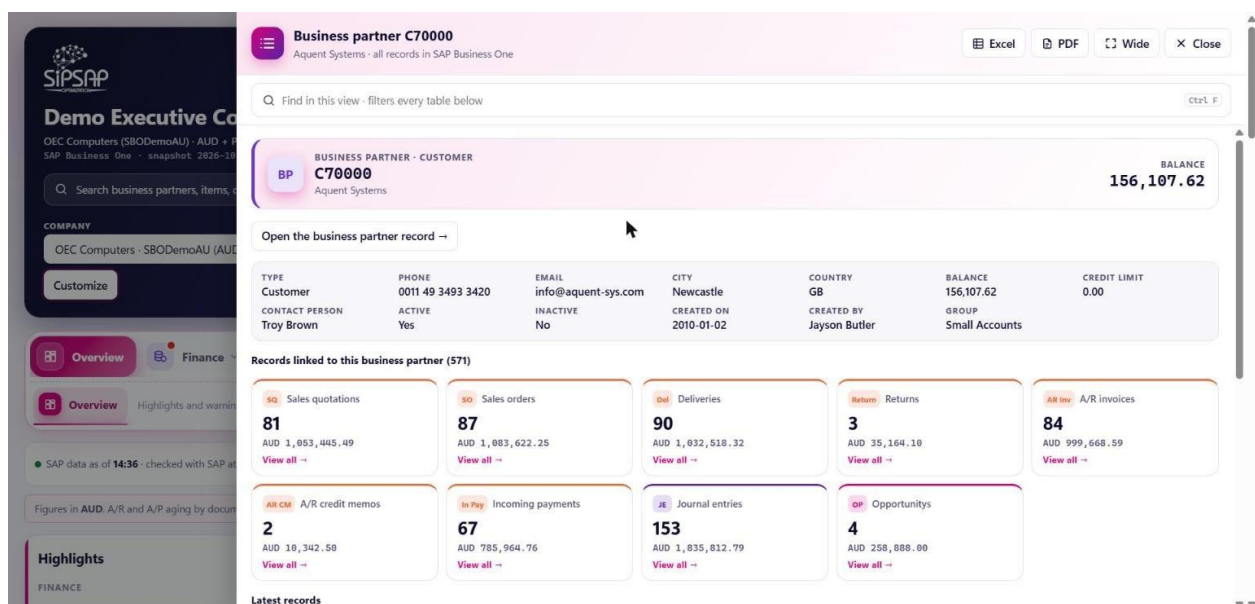


Figure 10. A business partner with all its linked records

3.5 Ask SAP

Click **Ask SAP** in the header (or the button at the bottom right) and type a question in plain words, for example "Top 10 customers in 2020" or "Open sales orders". You can also click one of the suggested questions. The answer is read live from SAP Business One and only includes data you are allowed to see.

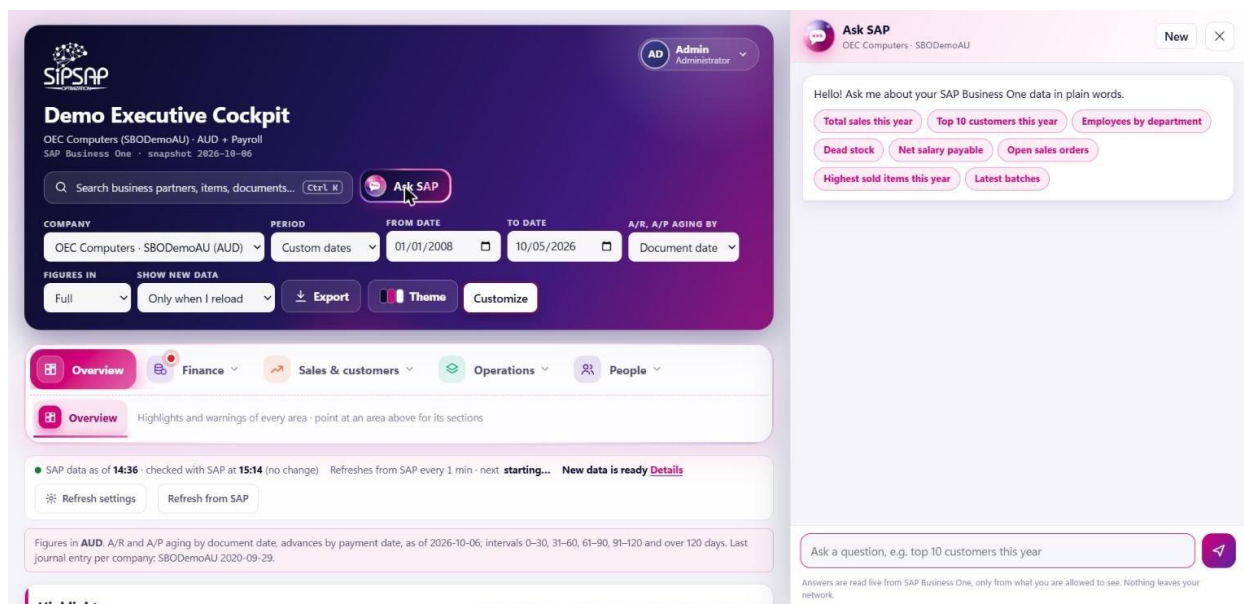


Figure 11. Ask SAP with suggested questions

Answers come as a chart and a table. Click **Show all** for the full list, or a follow-up chip such as **by month** or **by item** to look at the same answer another way. **New** starts a new conversation.

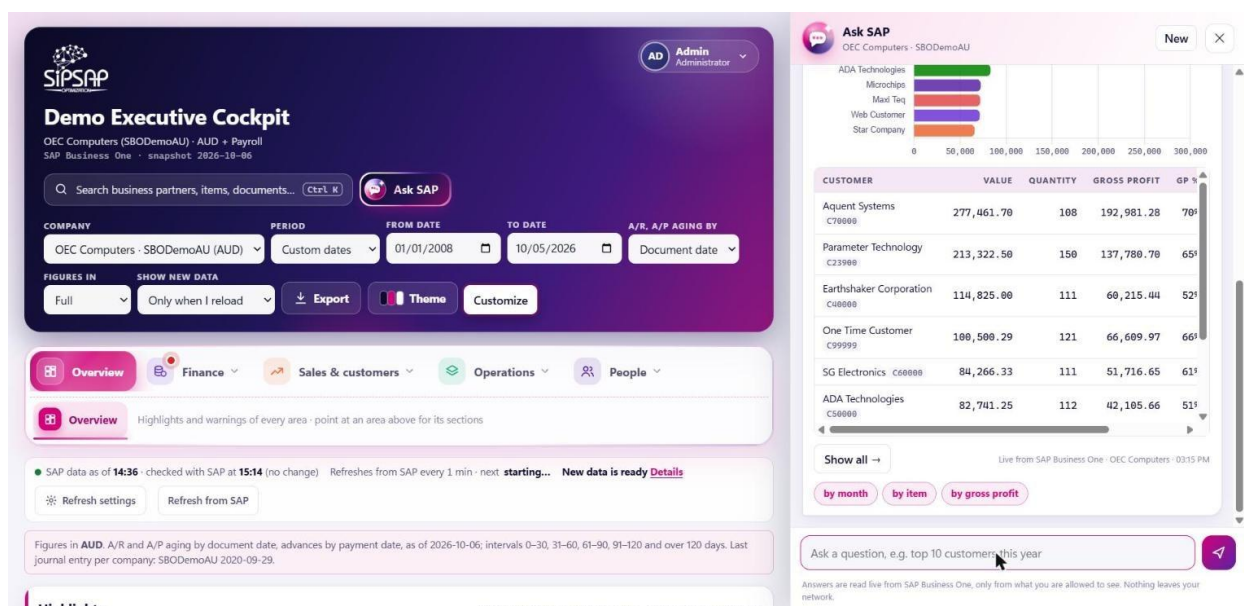


Figure 12. An Ask SAP answer with chart, table and follow-up chips

3.6 Export and print

Click **Export** in the header to export the current tab as a **PDF report** (A4 landscape with charts), an **Excel workbook** (all tables of the tab), or **Print** it. Most tables also have their own **Excel** button. Only the tabs and companies you may open are exported, and every export is recorded with your name.

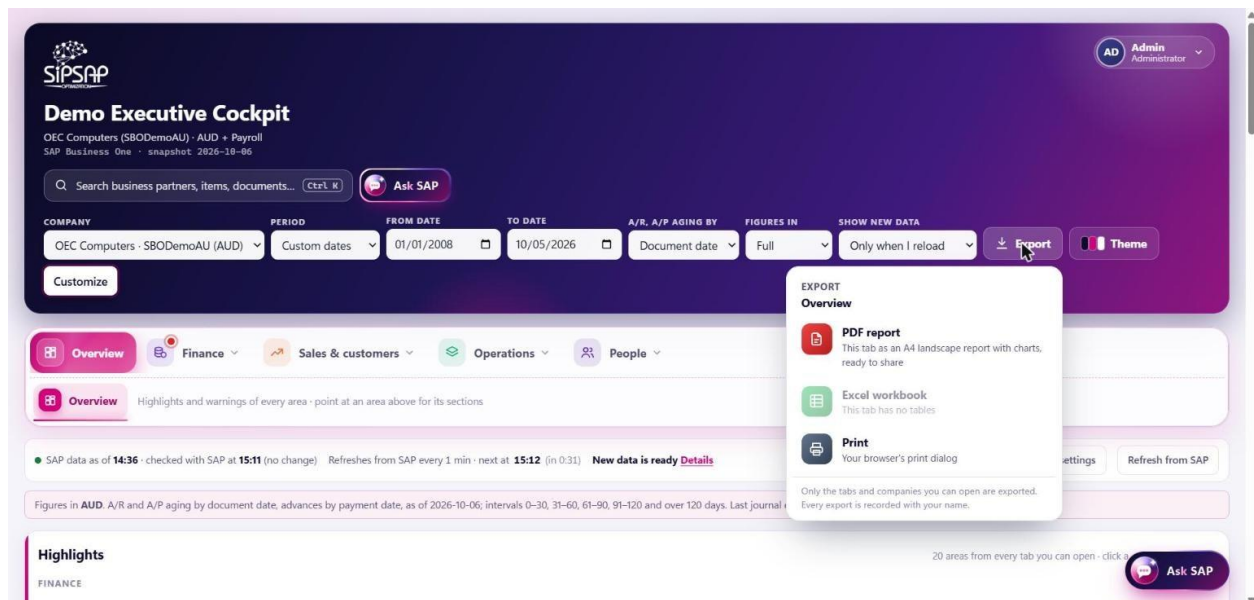


Figure 13. The Export menu

Note: If you have no Export button, or printing says "Printing is not allowed", your administrator has not given you the Excel export or PDF / print right.

3.7 Customize

Customize opens a panel where you choose which key figure tiles appear on the Overview and which tabs you see, and move tabs up or down. Your choices are kept in your browser. **Reset** returns to the standard layout and your default company.

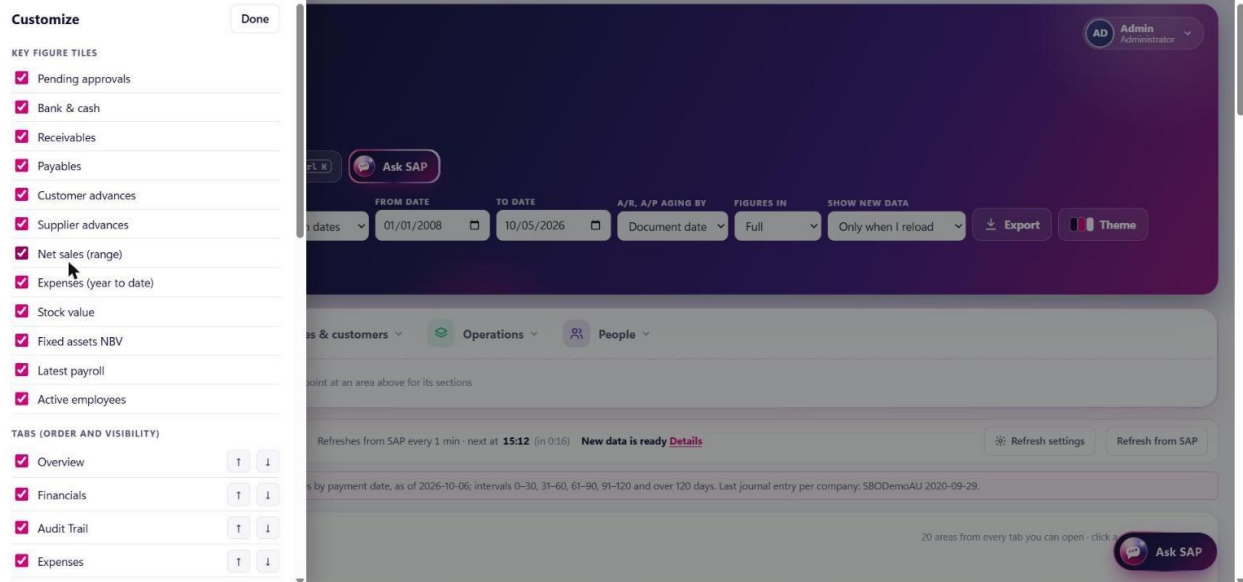


Figure 14. Customize: key figure tiles and tab order

3.8 Theme

Theme sets the appearance (Automatic follows Windows, Light or Dark) and the colour theme: SiPSAP Magenta (default), SiPSAP Night, SiPSAP Violet, Clean White, Jet Black, Classic Indigo, or Custom with your own four colours. The choice is kept in your browser and also used on the sign-in page.

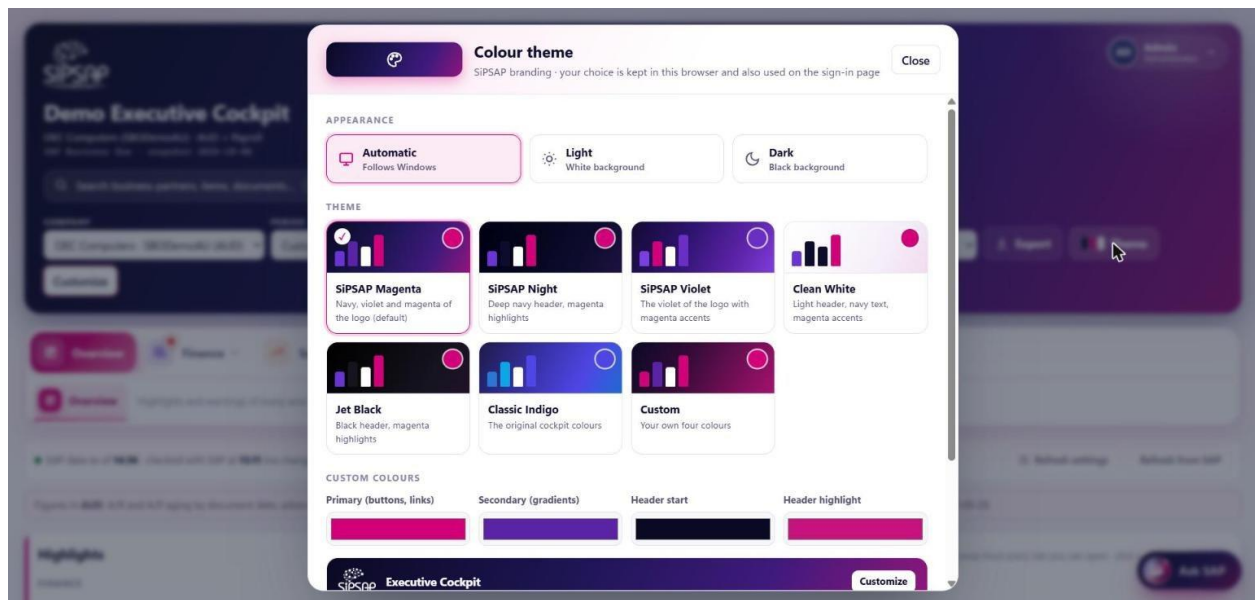


Figure 15. Colour theme

3.9 Your user menu

Click your name at the top right to see your role, access, license type and default company. Here you can set the company that opens when you sign in (**Open with ... by default**), go back to the organisation default, change your password and sign out. Administrators also see Users & access, License administration, Server configuration and Data refresh (chapter 9).

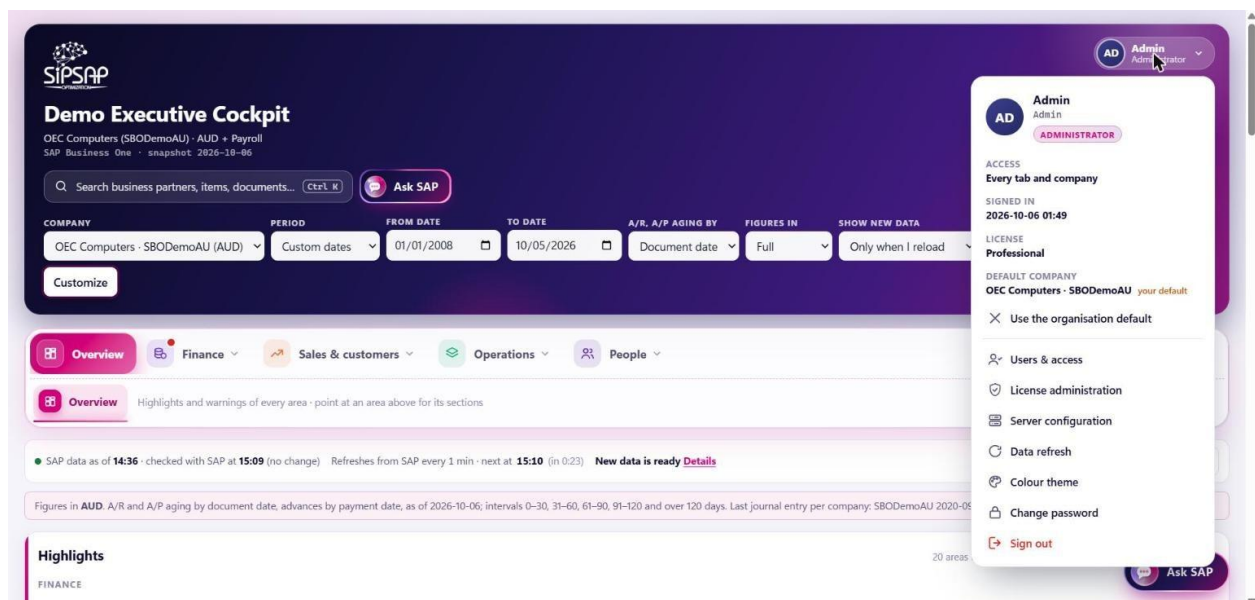


Figure 16. The user menu of an administrator

4. Overview

The Overview is the first page after sign-in. It brings together the most important figure of every area you may open, and lists what needs attention. Click any card, line or bar to open the tab behind it.

4.1 Highlights

One card per area, grouped by Finance, Sales and customers, Operations and People. Each card shows the main figure, a short explanation, a status badge (for example "Overdrawn" or "100% over 90 days") and a small trend line.

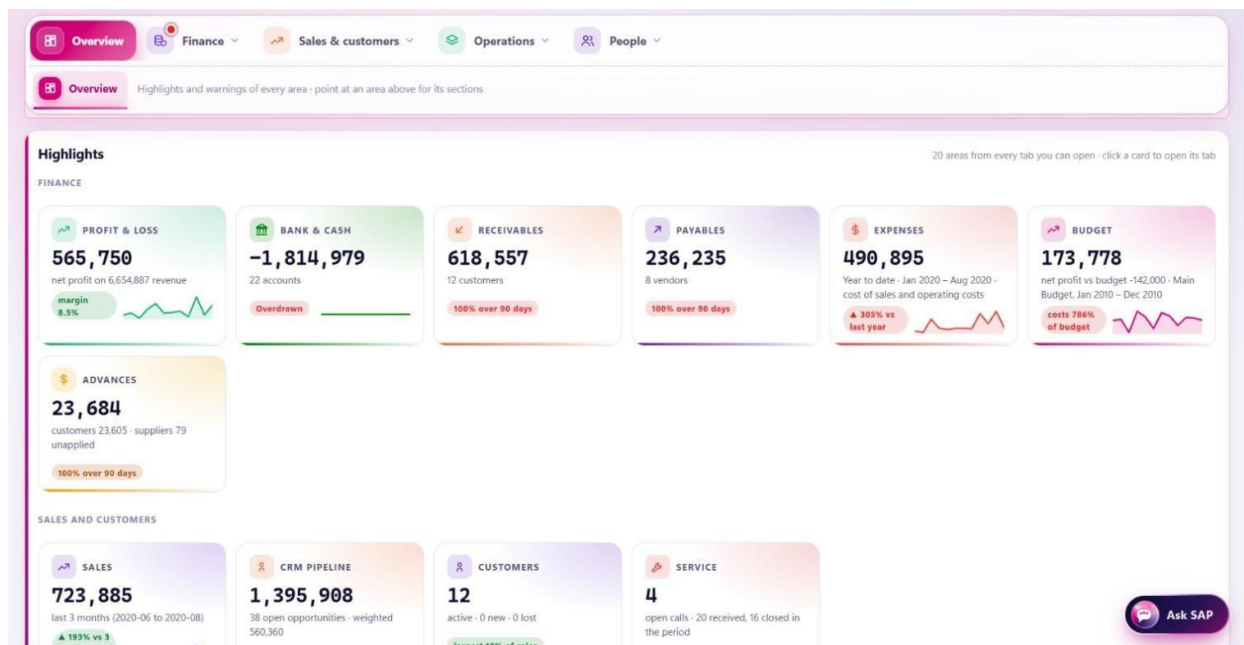


Figure 17. Highlights

4.2 Needs attention

A list of warnings from every tab, most urgent first: for example bank overdrawn, opportunities past their closing date, items out of stock, expenses above last year or costs over budget. The tab name on the right opens the tab.

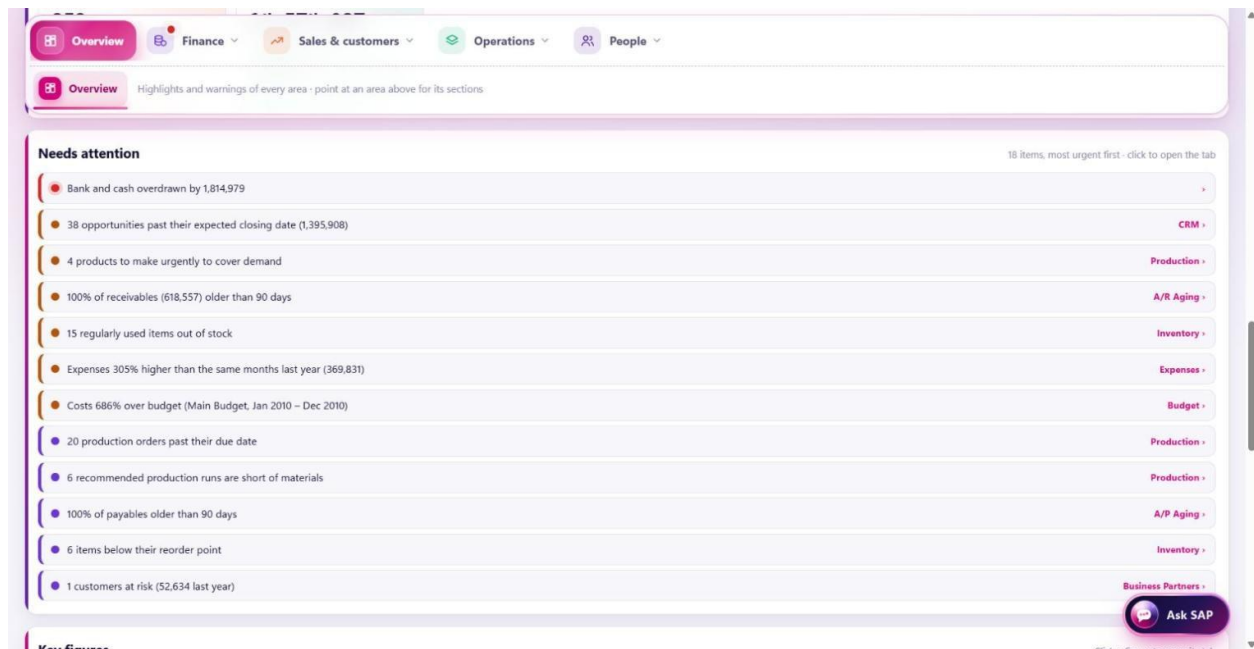


Figure 18. Needs attention

4.3 Key figures, aging and balances

Key figures shows twelve tiles such as pending approvals, bank and cash, receivables, payables, advances, net sales, expenses, stock value, fixed assets, latest payroll and active employees. Choose which tiles appear with Customize.

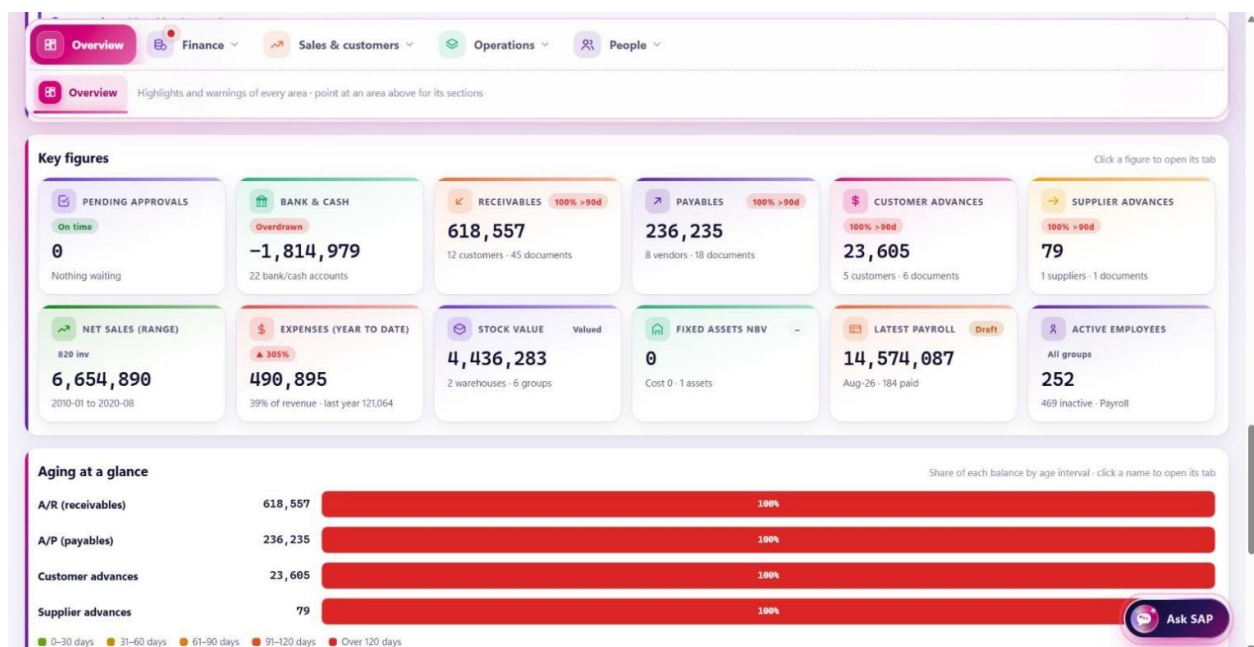


Figure 19. Key figures

Aging at a glance splits receivables, payables and advances into 0–30, 31–60, 61–90, 91–120 and over 120 days. **Balances at a glance** compares bank and cash, receivables, payables, advances, stock and fixed assets in one chart.

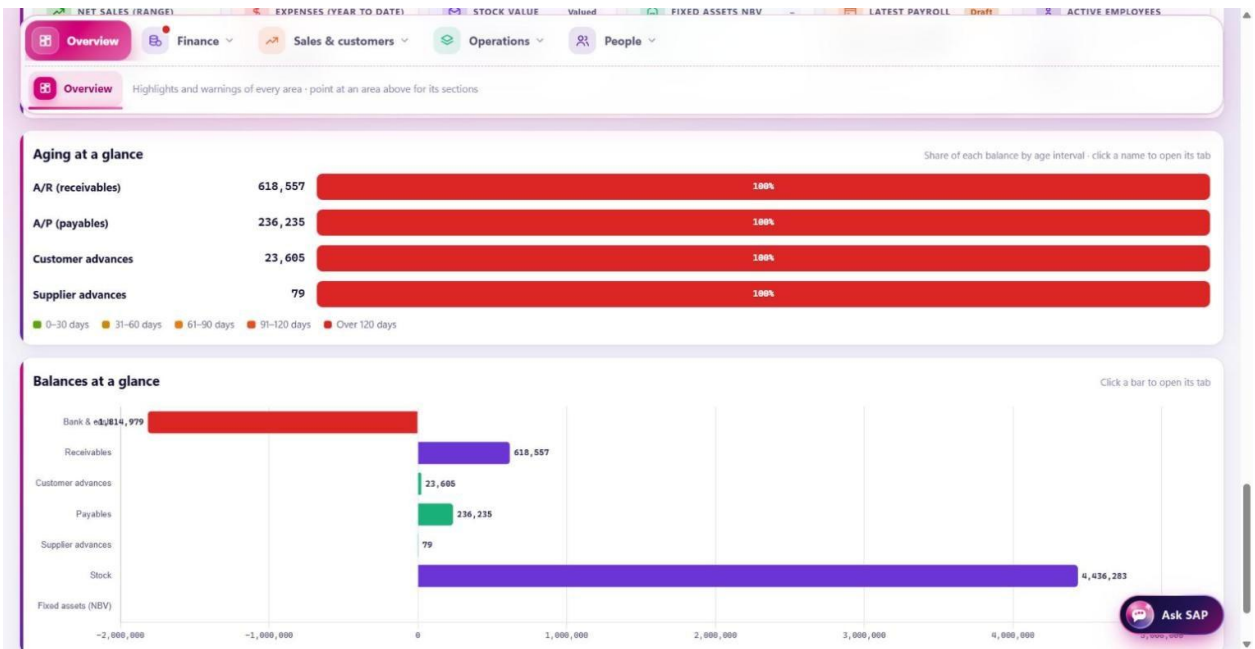


Figure 20. Aging and balances at a glance

5. Finance

5.1 Financials

Financials reads SAP Business One live for the header dates. Choose a period, a cost center or project, and one of eight views. Every figure opens its accounts, journal lines, journal entries and documents.

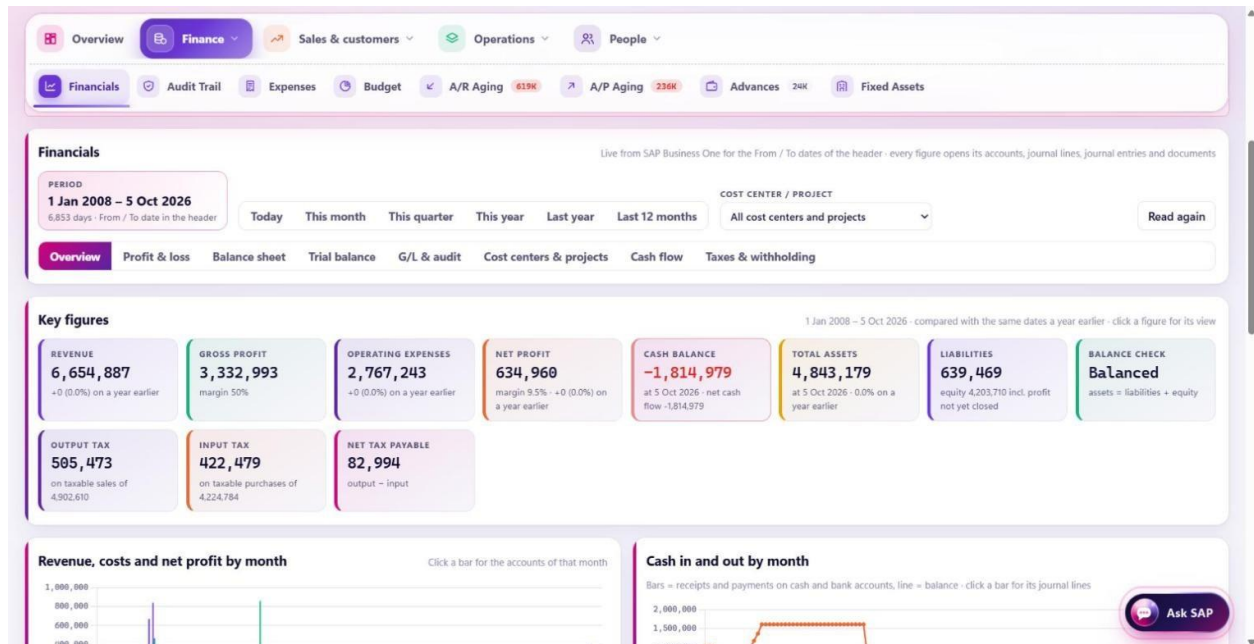


Figure 21. Financials: period, filters, views and key figures

The Overview view shows revenue, gross profit, operating expenses, net profit, cash balance, total assets, liabilities, a balance check and taxes, each compared with the same dates a year earlier. Below are charts of revenue, costs and net profit by month, cash in and out by month, a revenue-to-net-profit bridge and the balance sheet.

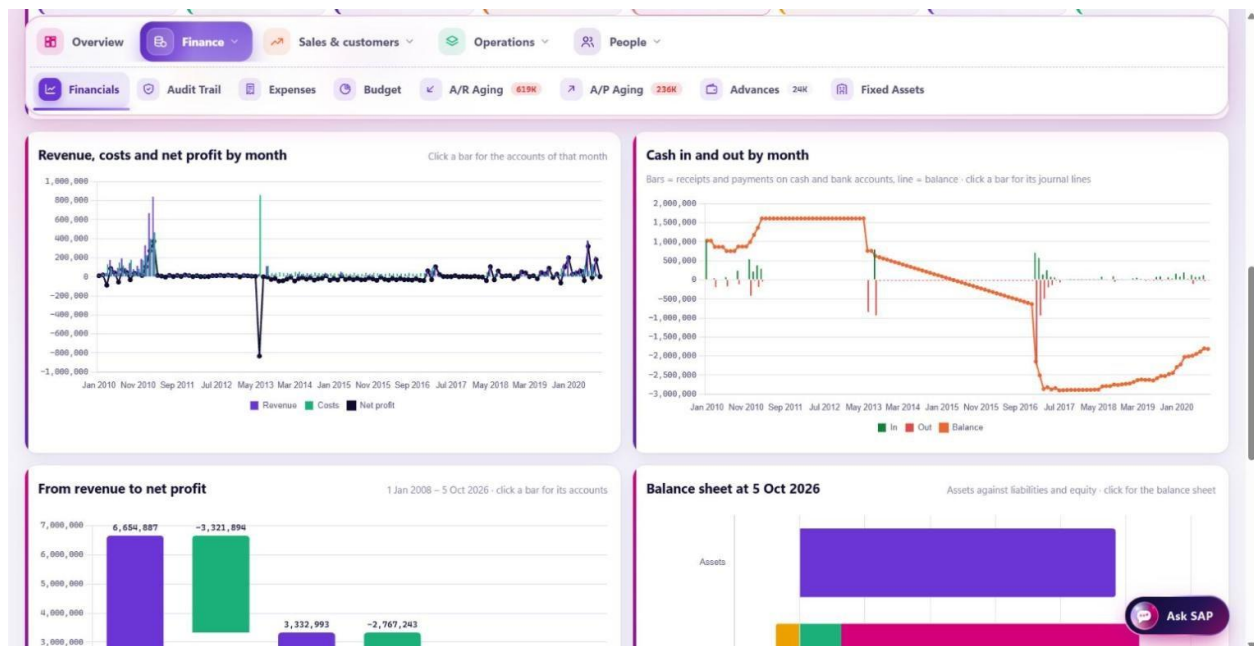


Figure 22. Financials: monthly charts

View	What it shows
Profit & loss	Statement by account heading against a year earlier, with % of revenue and change. Expand a heading, or search an account
Balance sheet	Assets, liabilities and equity at the To date: opening, movement, closing and a year earlier
Trial balance	Opening, debits, credits and closing balance per account, with a period check (debits = credits)
G/L & audit	Checks on journal entries: manual entries, back-dated, forward-dated, weekend postings, reversals, round amounts, duplicates, unbalanced entries
Cost centers & projects	Profit and loss or balance sheet by department, line of business or project
Cash flow	Cash in and out from the cash and bank accounts, split into operating, investing and financing, with cash cover in days
Taxes & withholding	Output and input tax, net tax payable and every tax code with its taxable amount

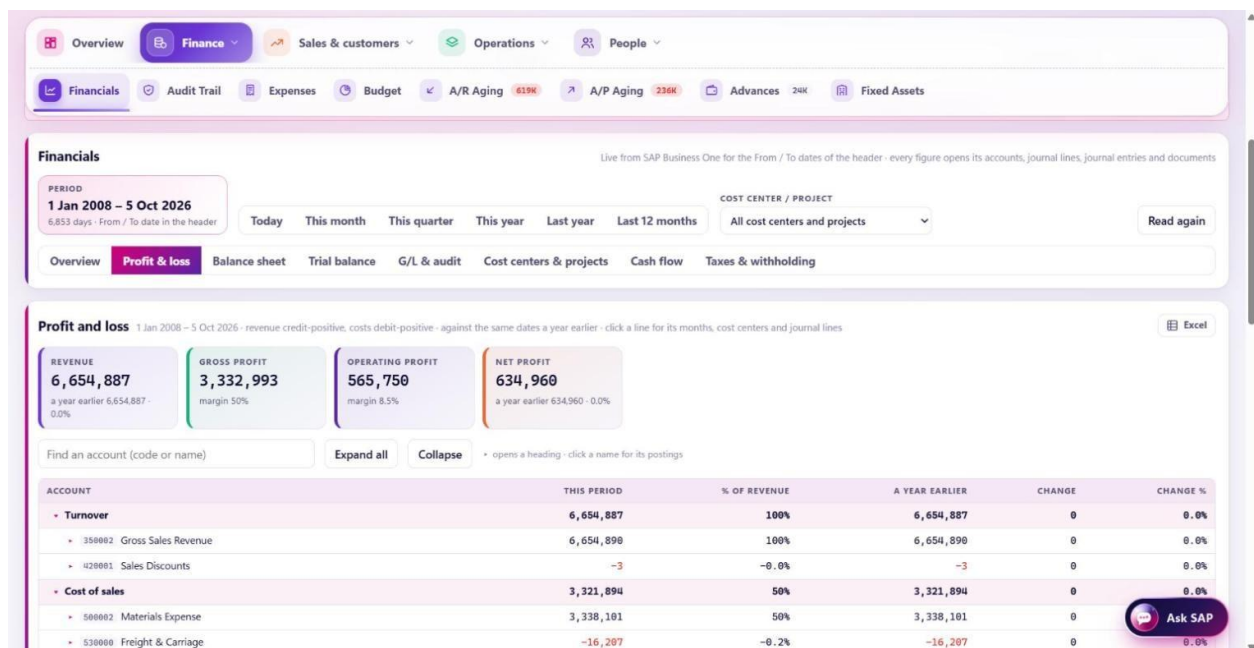


Figure 23. Profit & loss

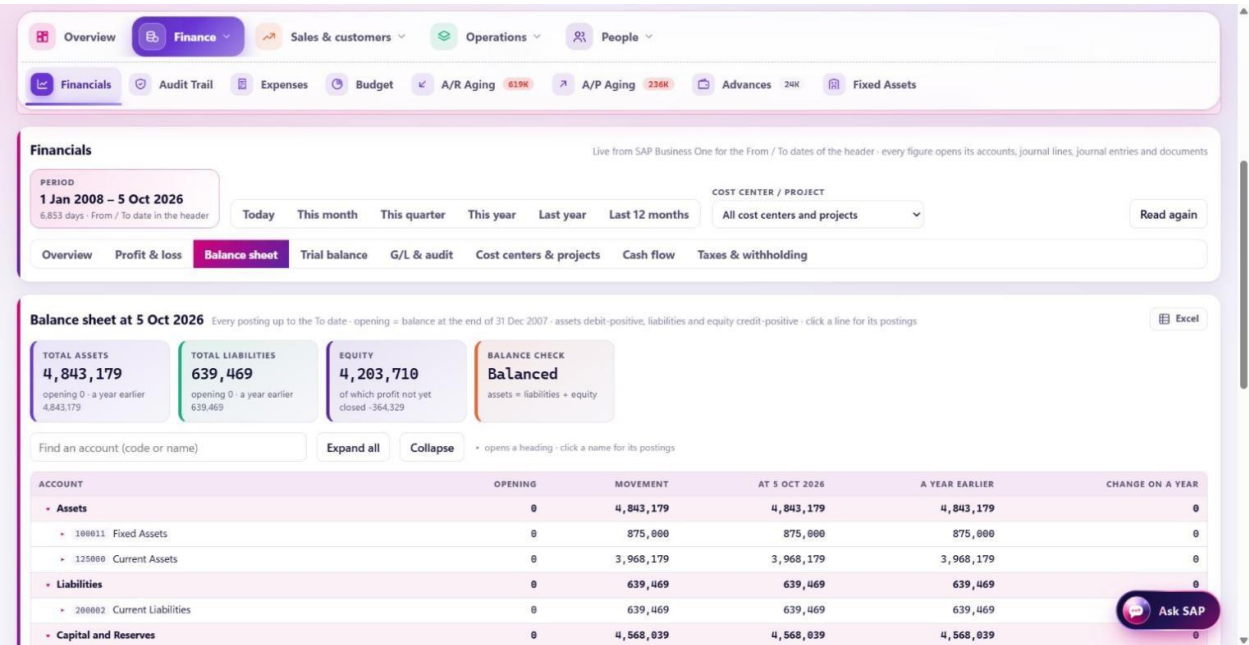


Figure 24. Balance sheet

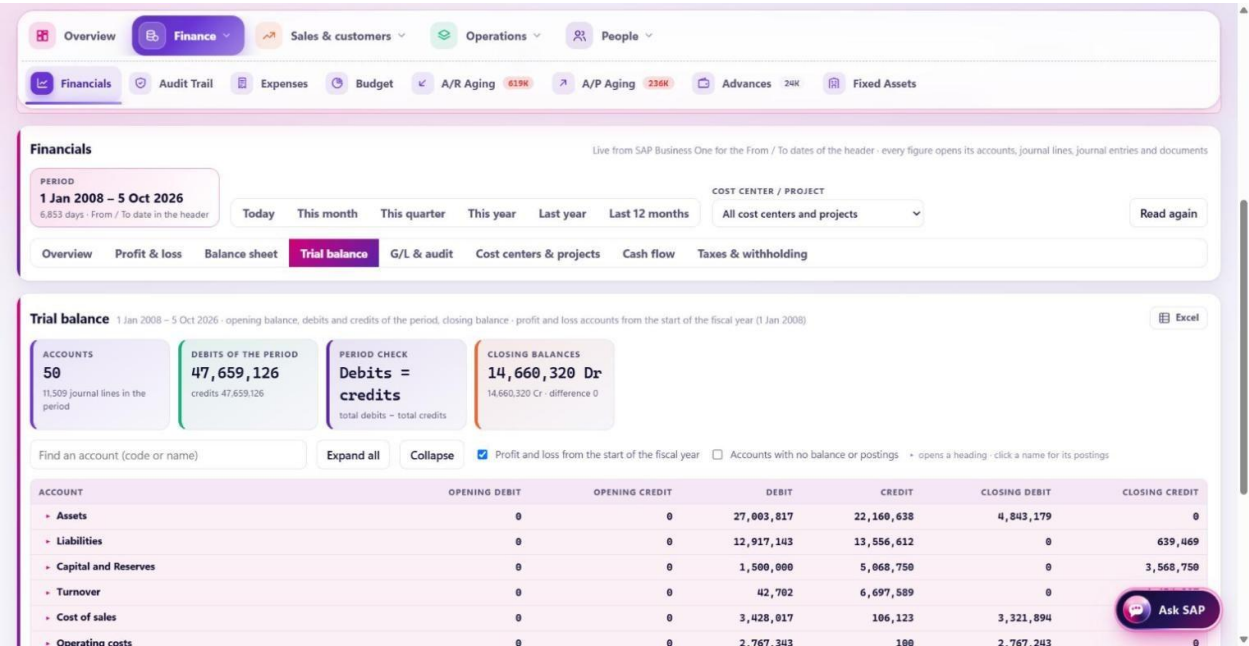


Figure 25. Trial balance

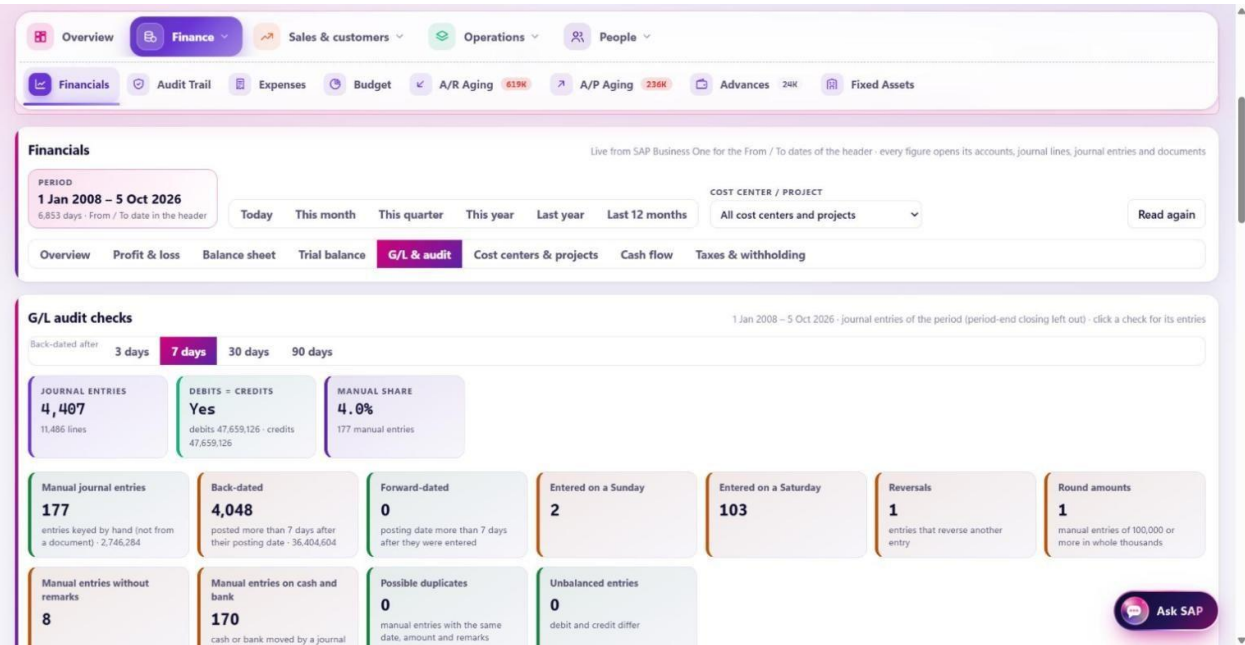


Figure 26. G/L audit checks

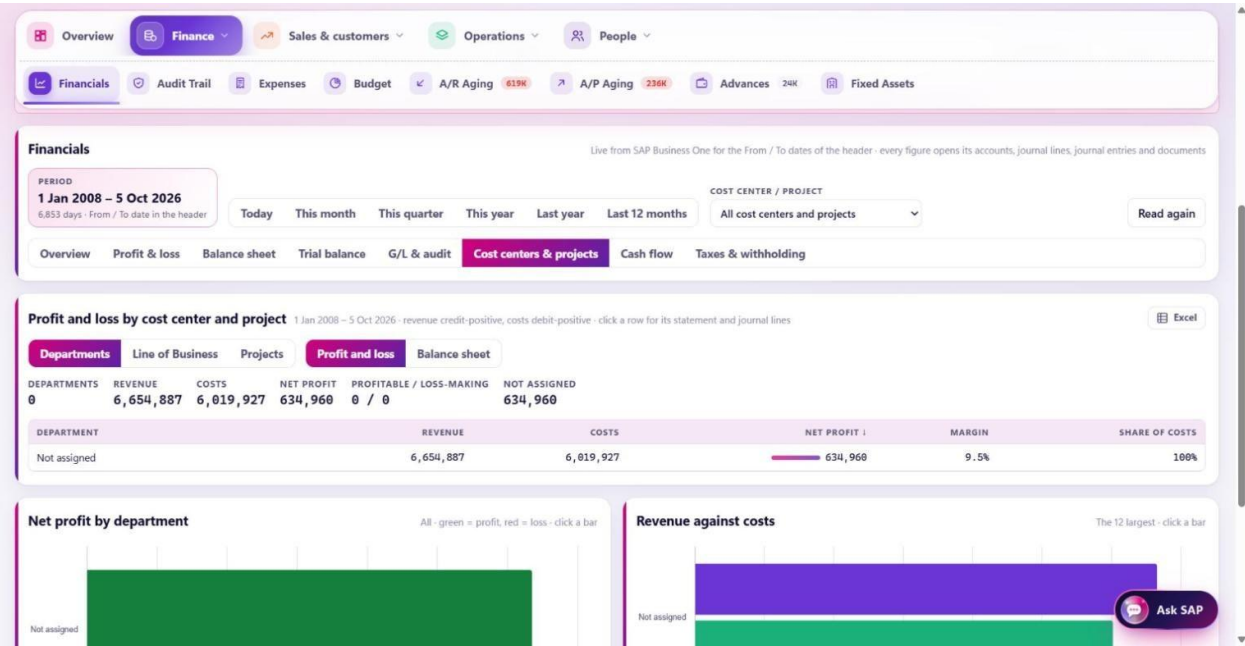


Figure 27. Cost centers and projects

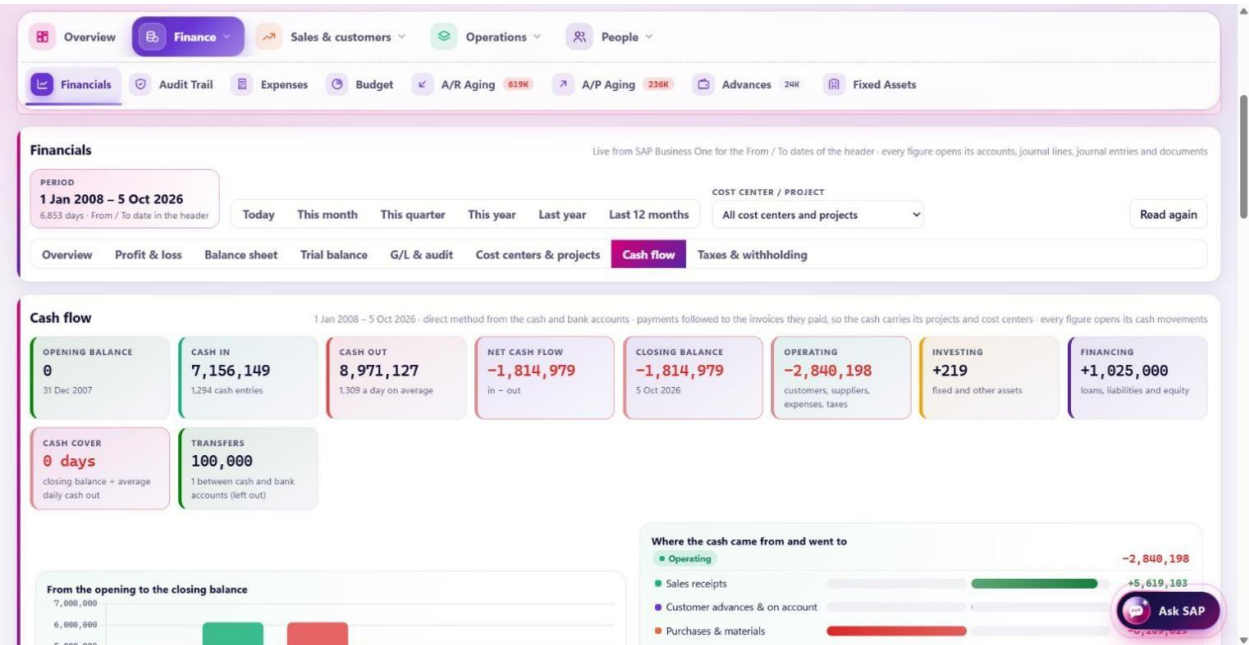


Figure 28. Cash flow

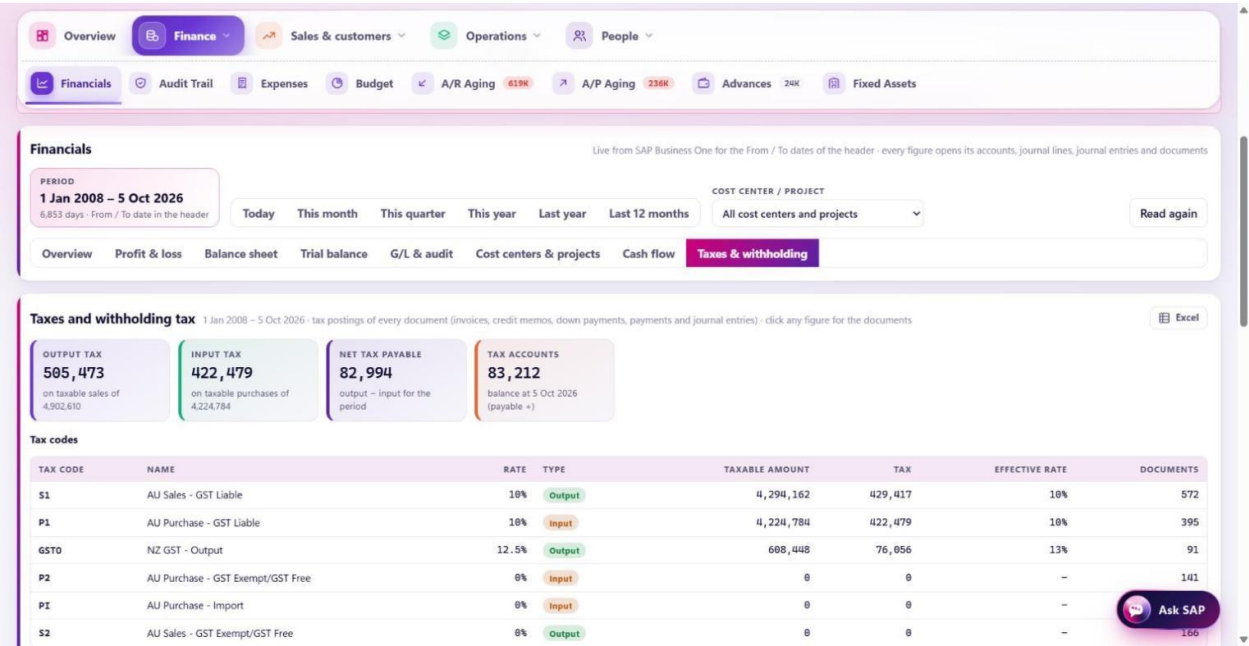


Figure 29. Taxes and withholding tax

5.2 Audit Trail

Audit Trail shows who created, changed and cancelled what in SAP Business One, and when. Filter by period and SAP user. It needs the change log of SAP Business One to be switched on.

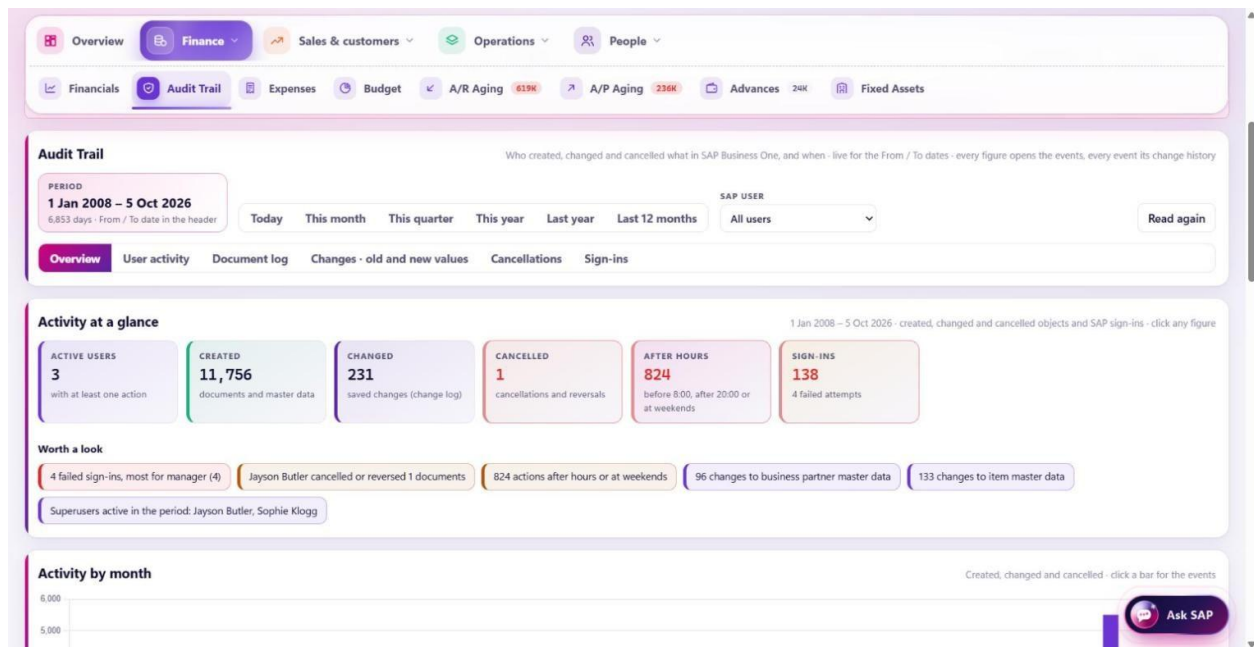


Figure 30. Audit Trail: activity at a glance and worth a look

View	What it shows
Overview	Active users, created, changed and cancelled objects, after-hours actions and sign-ins, with notes worth a look
User activity	Every SAP user with created, changed and cancelled counts, after-hours work, sign-ins and a month-by-month grid
Document log	Every document, payment, journal entry and master record created, changed or cancelled, newest first
Changes · old and new values	Every saved change field by field, by kind of object, with the most changed fields
Cancellations	Cancelled documents and reversed journal entries, who cancelled what and how soon
Sign-ins	The SAP access log: sign-ins, failed attempts, lock-outs and password changes, with the computers used

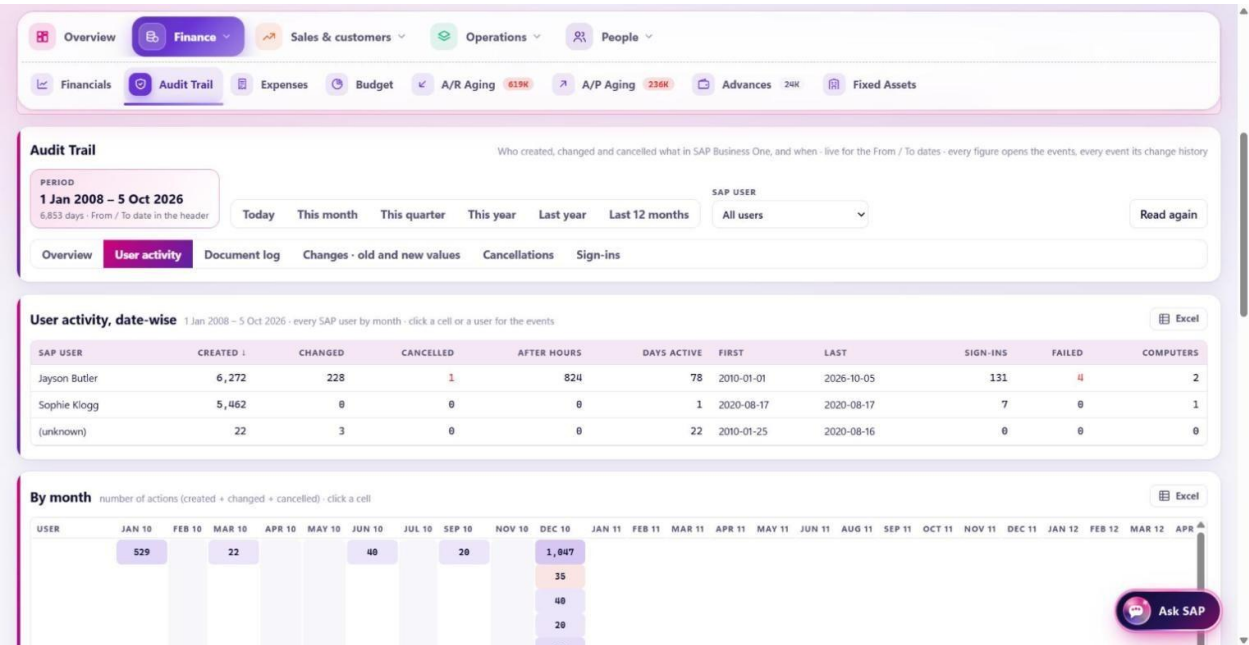


Figure 31. User activity

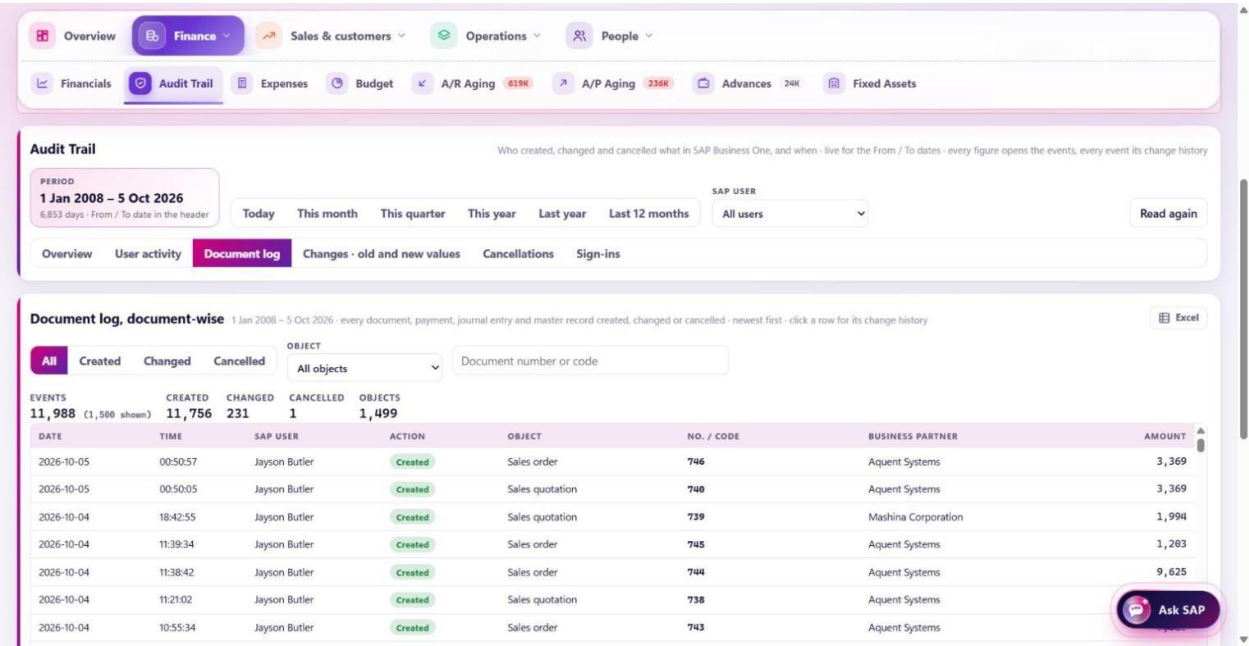


Figure 32. Document log

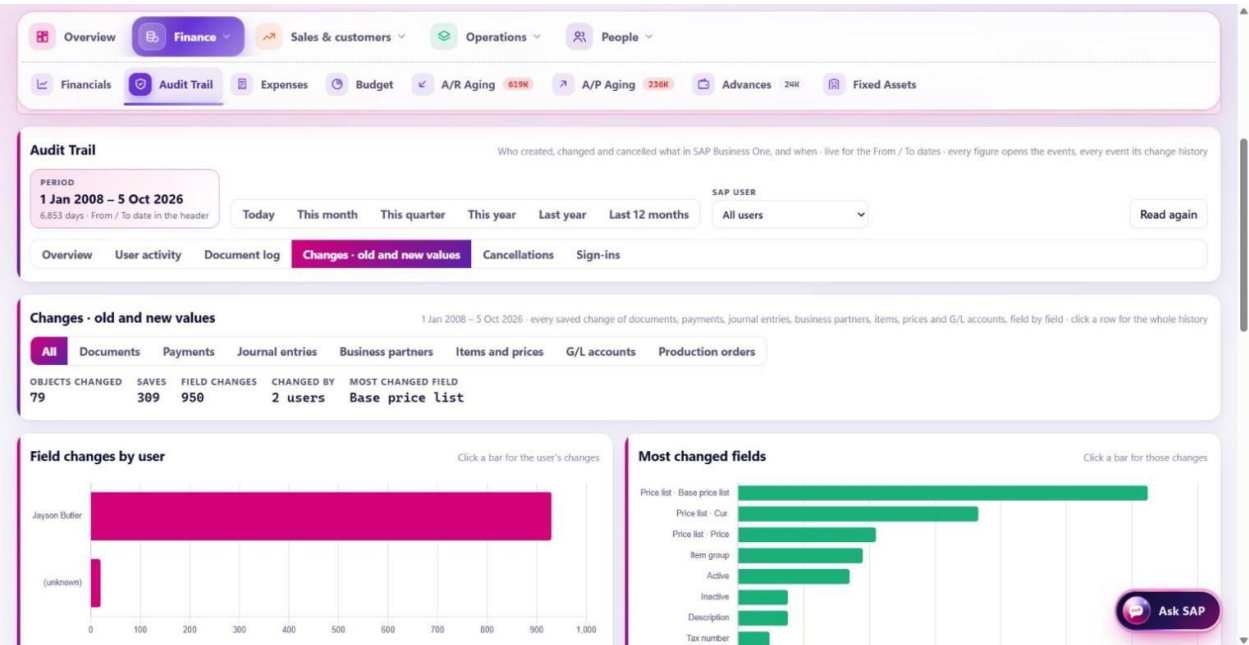


Figure 33. Changes with old and new values

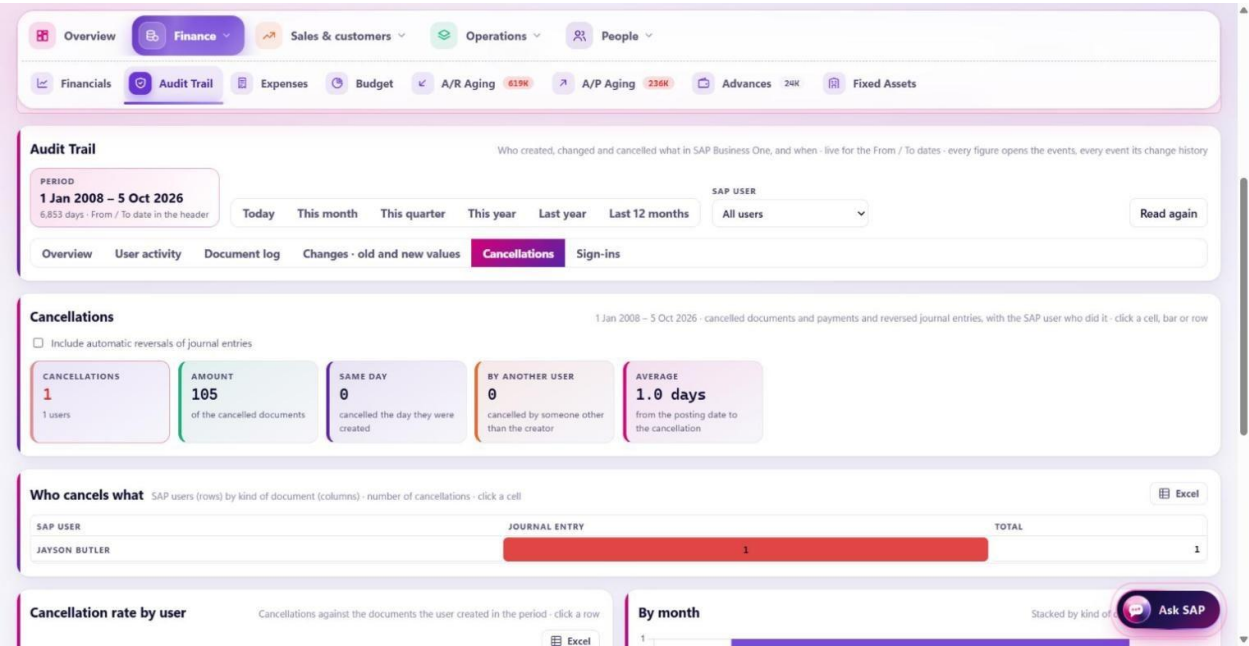


Figure 34. Cancellations

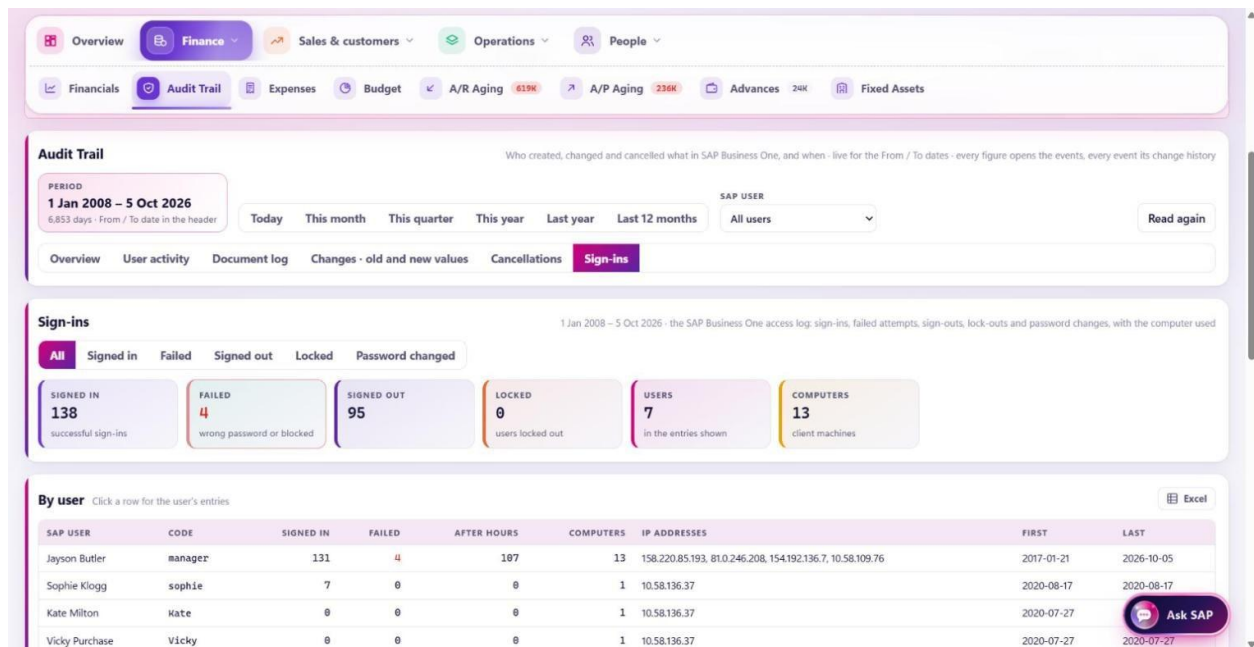


Figure 35. Sign-ins

5.3 Expenses

Expenses analyses cost of sales and operating costs. Choose all expenses, cost of sales or operating costs, and month, quarter, year to date, 12 months or the header range, as of a chosen month.

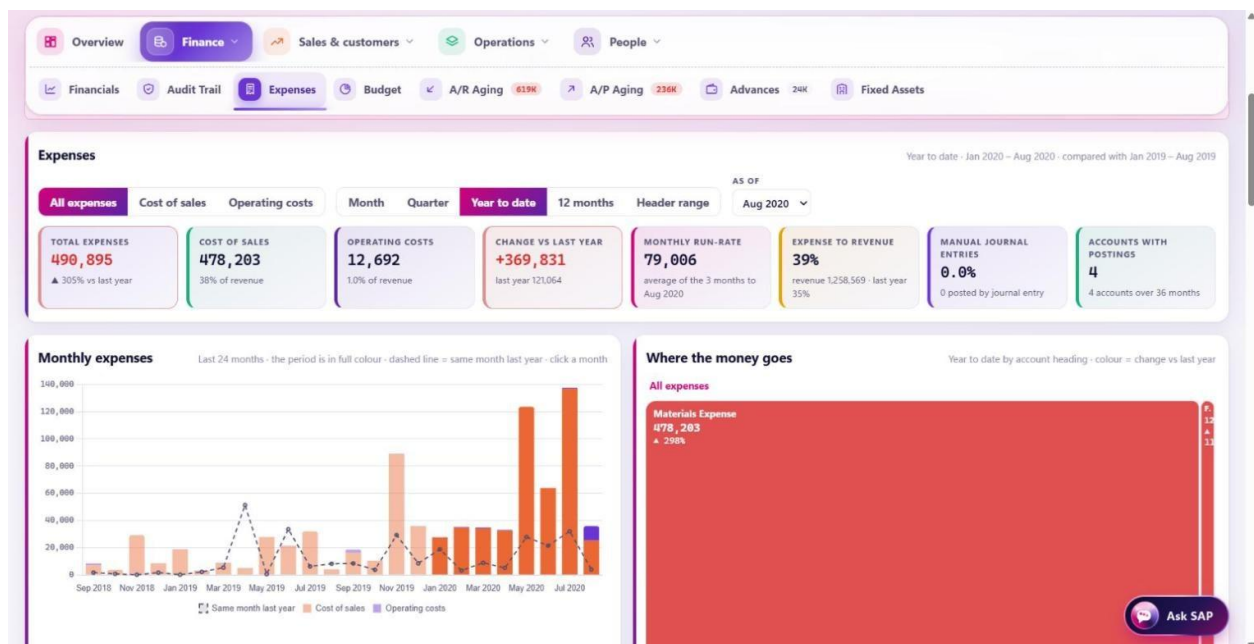


Figure 36. Expenses: filters and key figures

Monthly expenses compares each month with the same month last year. **Where the money goes** is a tile map: tile size is the amount, colour is the change against last year; click a tile to go deeper.

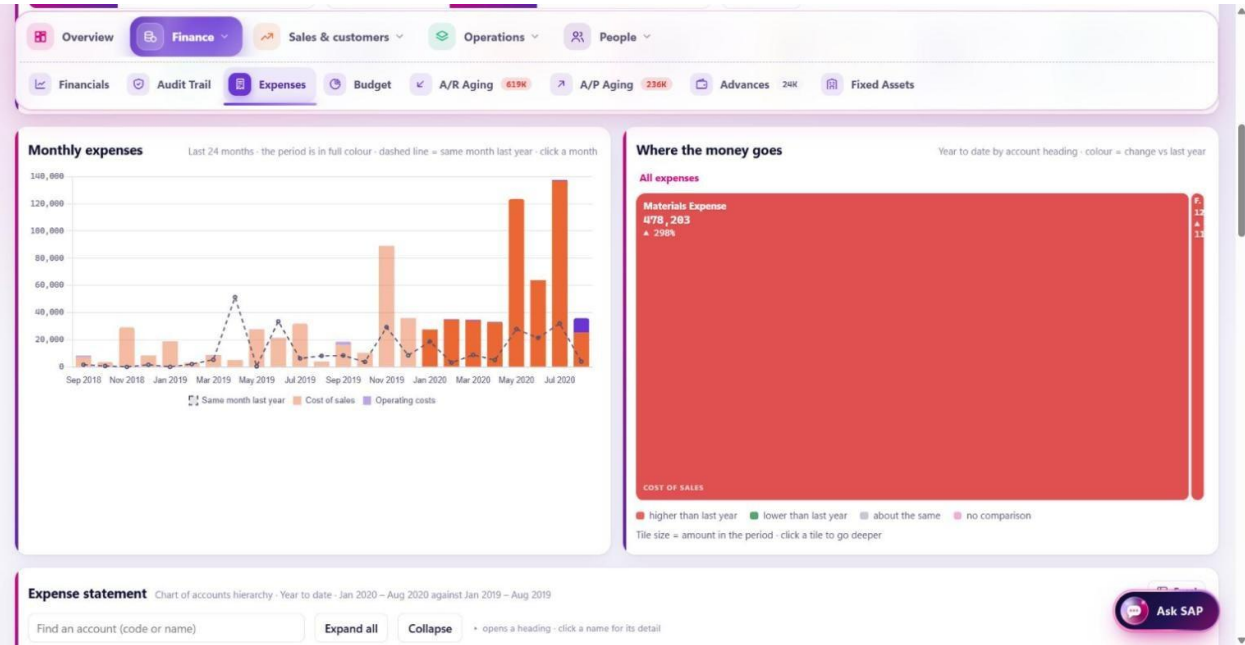


Figure 37. Monthly expenses and where the money goes

The **Expense statement** lists the chart of accounts with year to date, last year, change, share, % of revenue and a 12-month trend line.

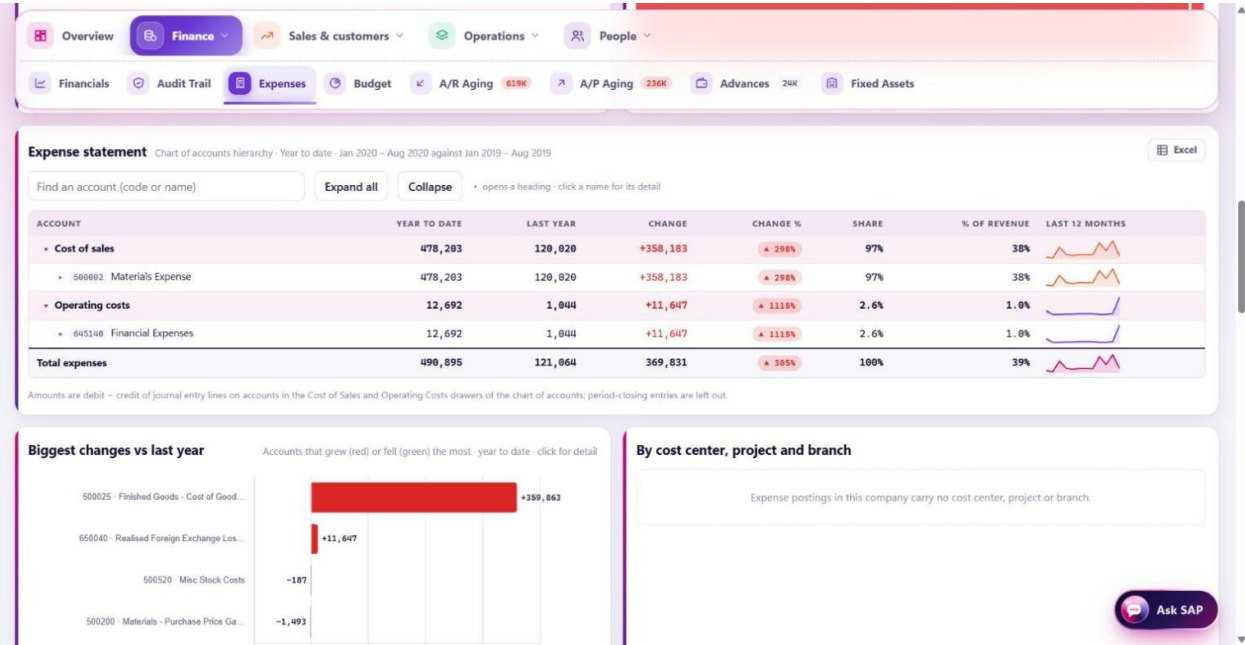


Figure 38. Expense statement

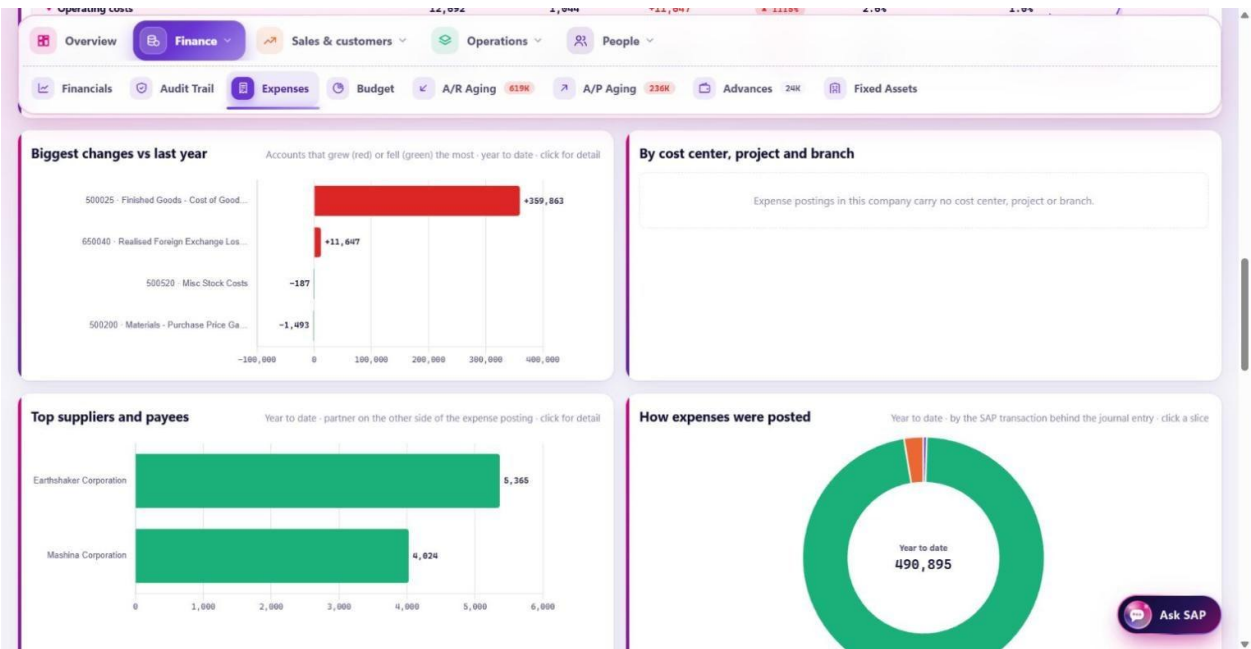


Figure 39. Biggest changes, cost centers, top suppliers and how expenses were posted

5.4 Budget

Budget compares SAP Business One budgets with actual postings. Choose the fiscal year, budget scenario, period (year to date, full year, quarter, month or from–to) and cost center. Green means favourable, red unfavourable.

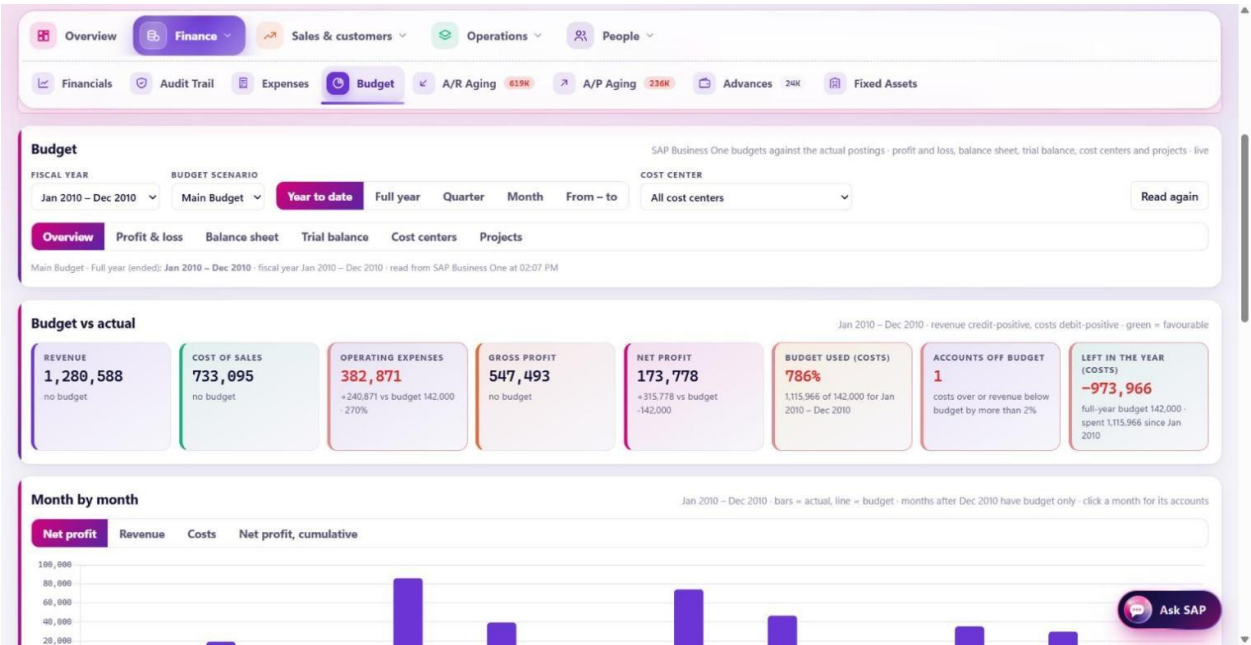


Figure 40. Budget vs actual

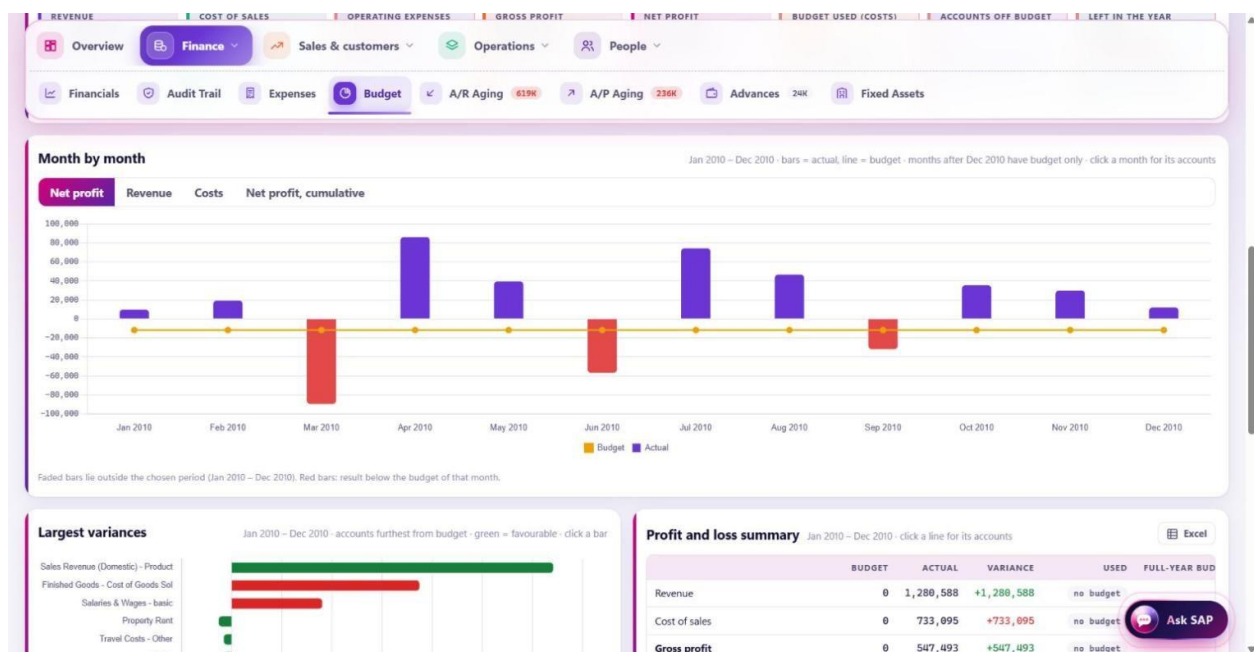


Figure 41. Month by month: bars are actual, the line is budget

The views **Profit & loss**, **Balance sheet**, **Trial balance**, **Cost centers** and **Projects** show budget, actual, variance, % used, status and what is left in the year for every account.

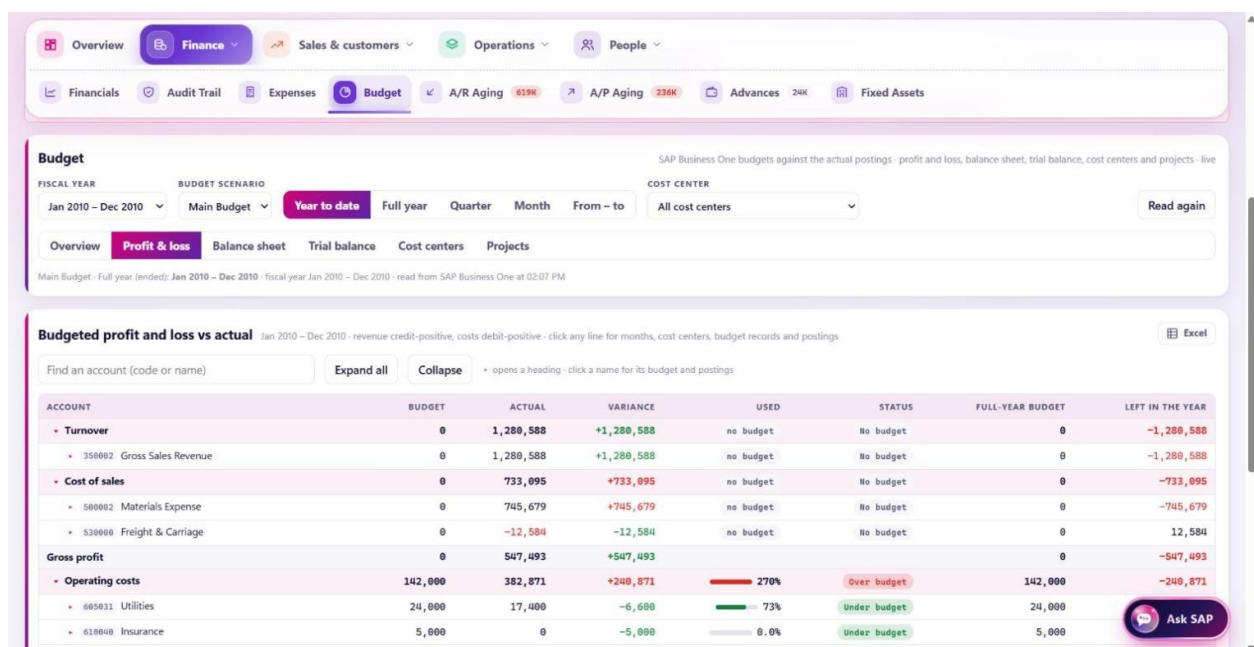


Figure 42. Budgeted profit and loss vs actual

Note: **BOQ Control** (bill of quantities against quotations, orders, receipts and invoices) appears in Finance only for companies that have the BOQ user-defined tables. The demo company has none, so it is not shown here.

5.5 A/R Aging and A/P Aging

A/R Aging shows what customers owe and A/P Aging what you owe suppliers, split into age intervals. The aging basis (document date or due date) is set in the header. Key figures include the open balance, over 90 and over 120 days, the balance net of advances and the G/L balance.

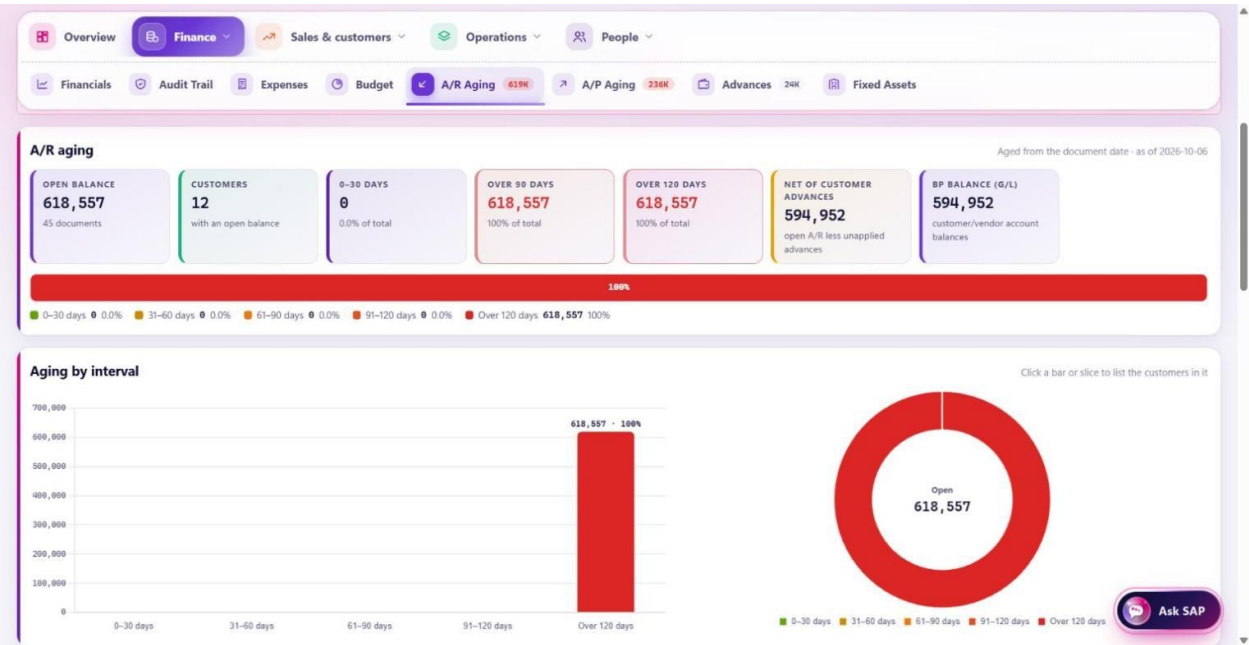


Figure 43. A/R aging: key figures and aging by interval

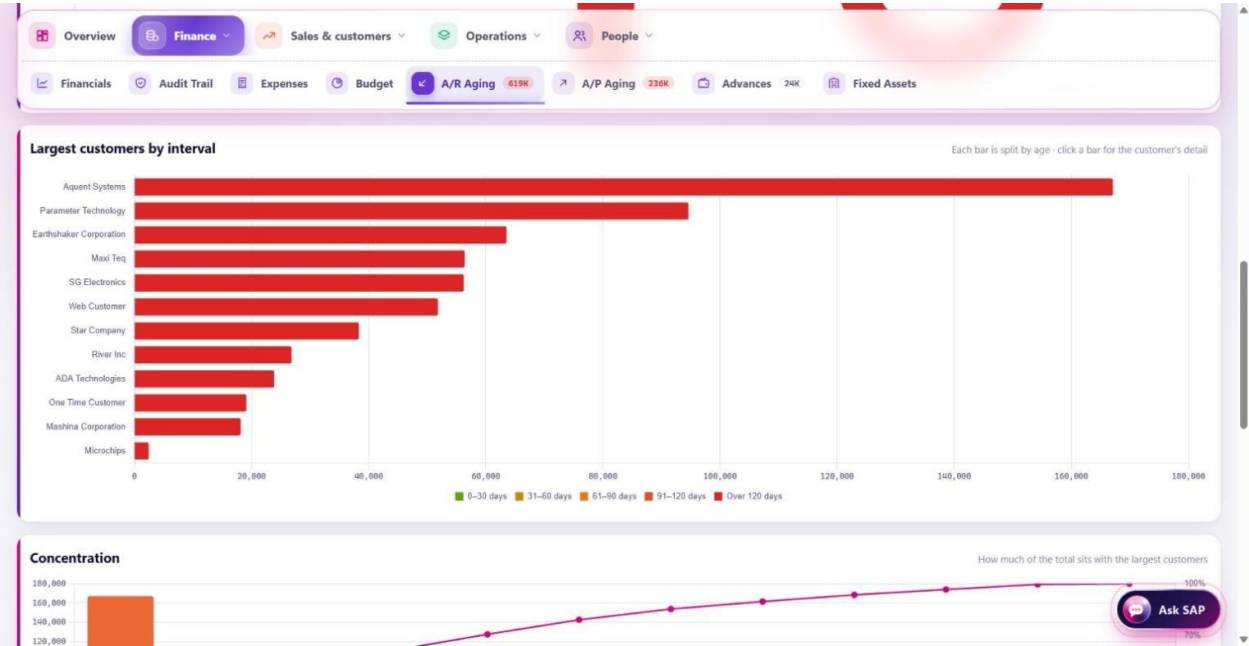


Figure 44. Largest customers by interval

Below are a concentration (Pareto) chart and a table of every customer by interval; darker cells hold more of the total. Click a row for the customer and the open documents.

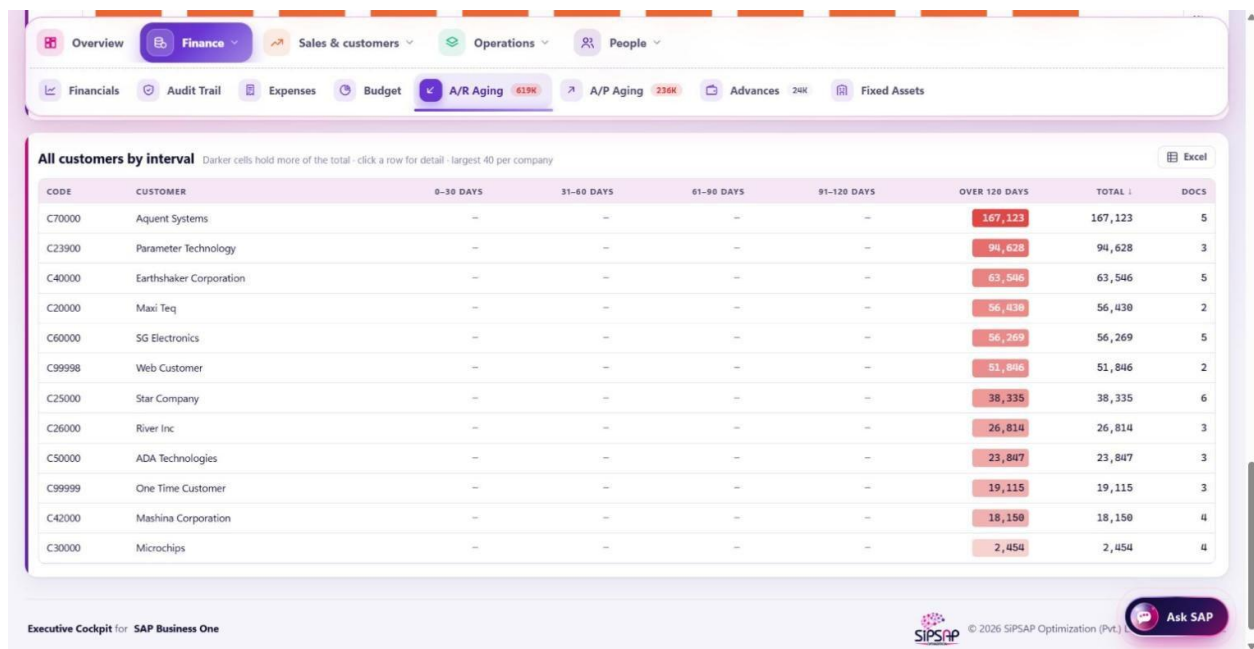


Figure 45. All customers by interval

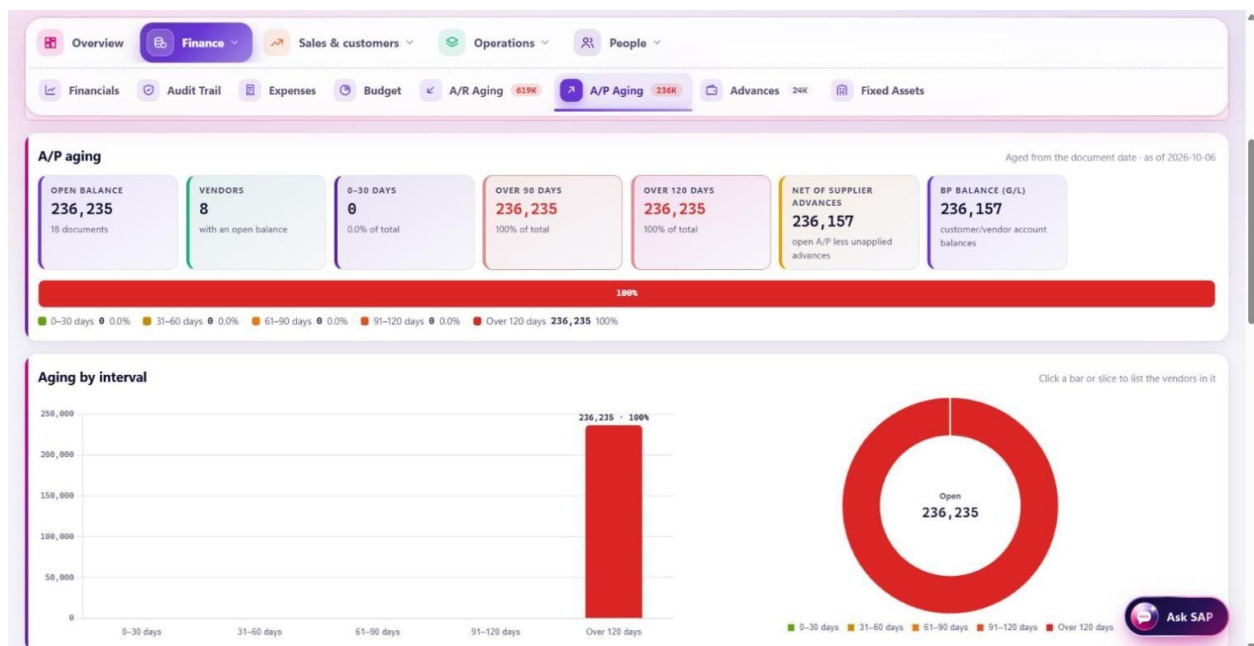


Figure 46. A/P aging works the same way for vendors

5.6 Advances

Advances shows money received from customers and paid to suppliers that is not yet applied to an invoice, aged from the payment date. Switch between customer and supplier advances.

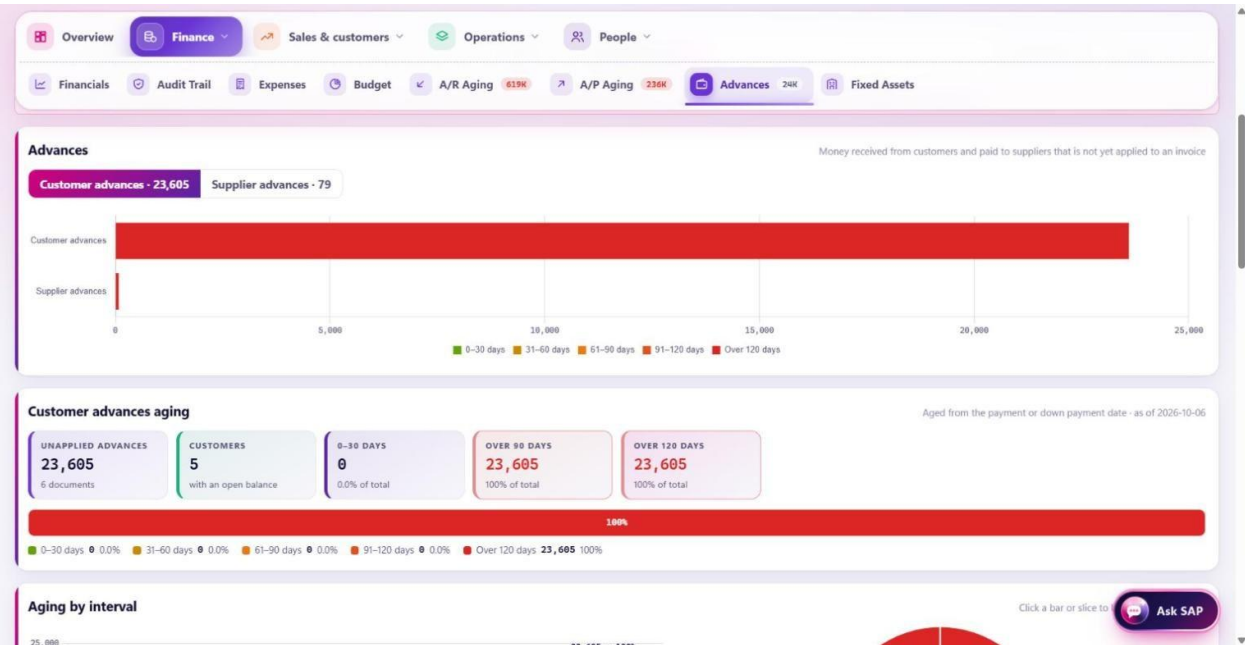


Figure 47. Customer and supplier advances

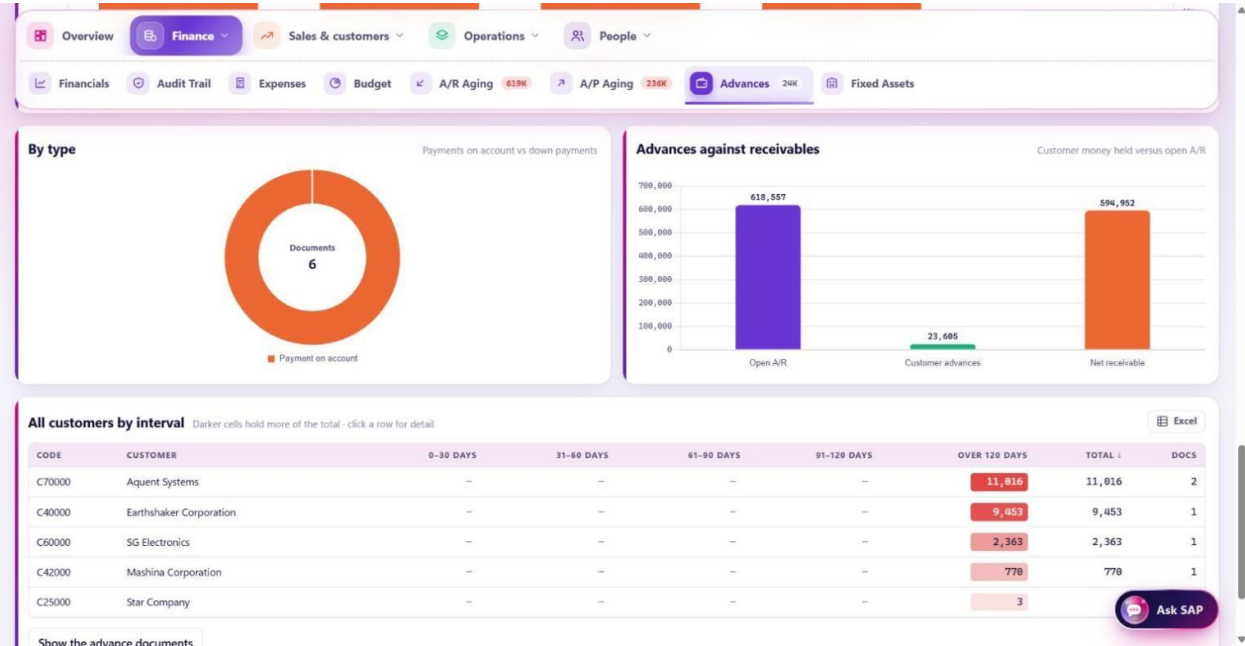


Figure 48. Advances by type and against open receivables

5.7 Fixed Assets

Fixed Assets reads asset master data, the depreciation plan and asset documents live. Choose the depreciation area, the year of the asset values and the asset class.

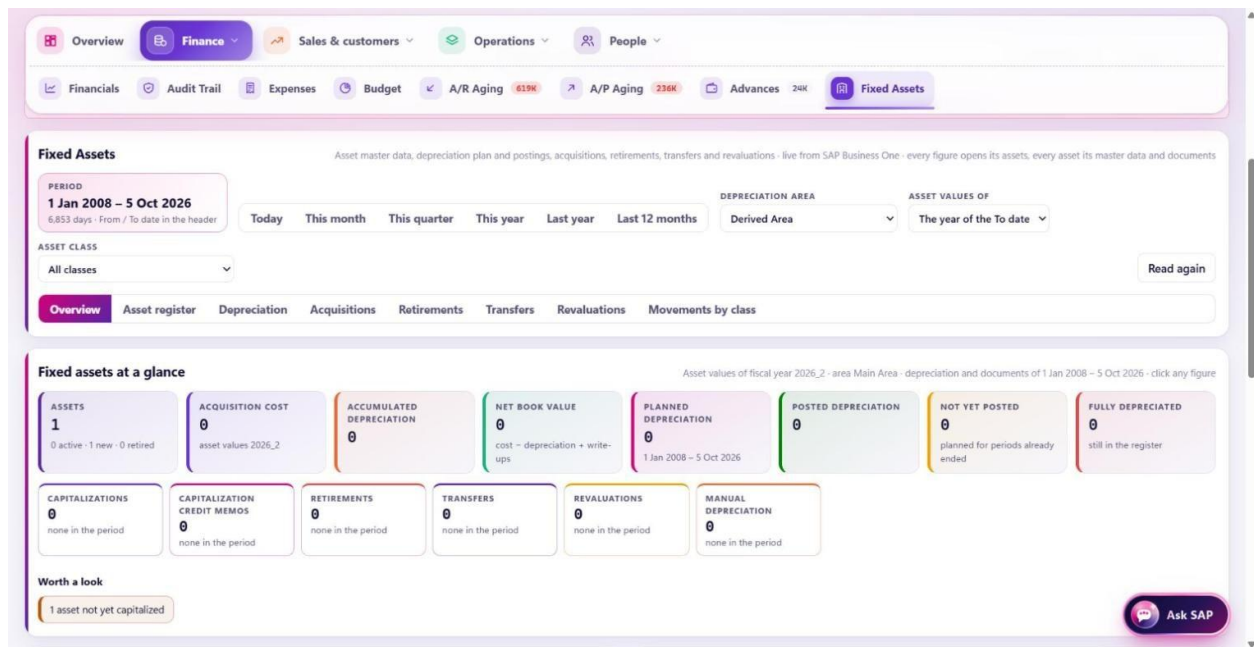


Figure 49. Fixed assets at a glance

View	What it shows
Overview	Assets, acquisition cost, accumulated depreciation, net book value, planned and posted depreciation, documents of the period
Asset register	Every asset with class, capitalization date, useful life, cost, depreciation, net book value and status
Depreciation	Planned, posted, still to come and not yet posted depreciation, with depreciation runs
Acquisitions, Retirements, Transfers, Revaluations	The asset documents of each kind in the period
Movements by class	Values and movements by asset class, like the SAP asset history sheet

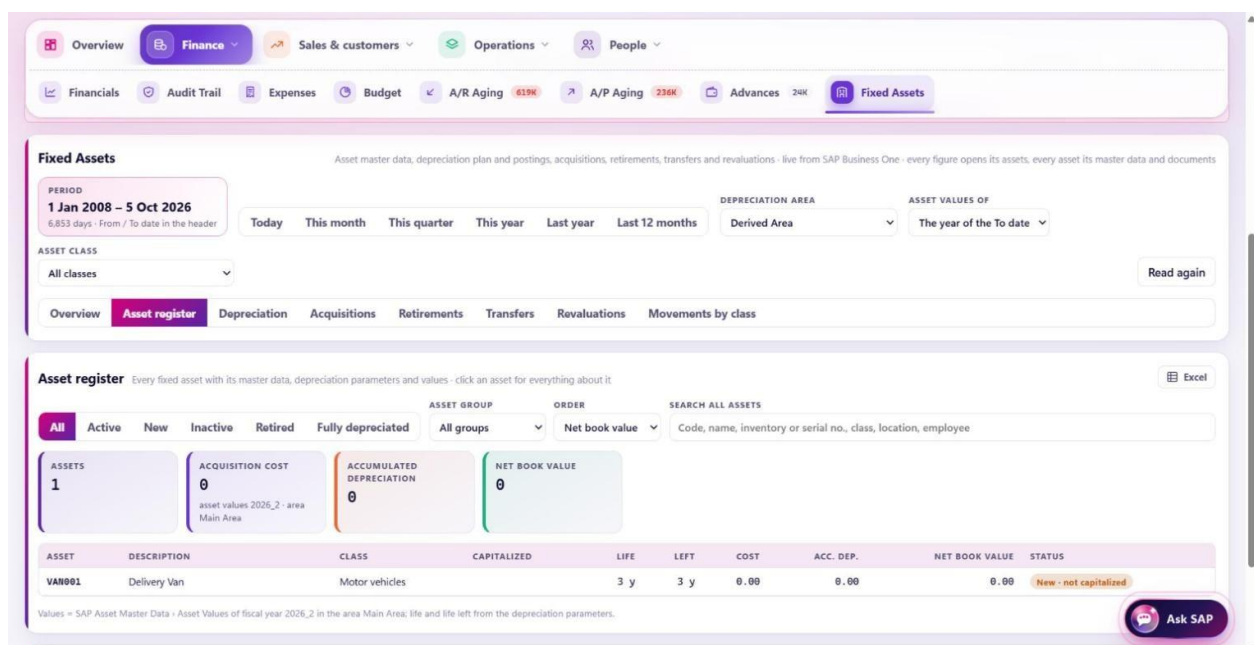


Figure 50. Asset register

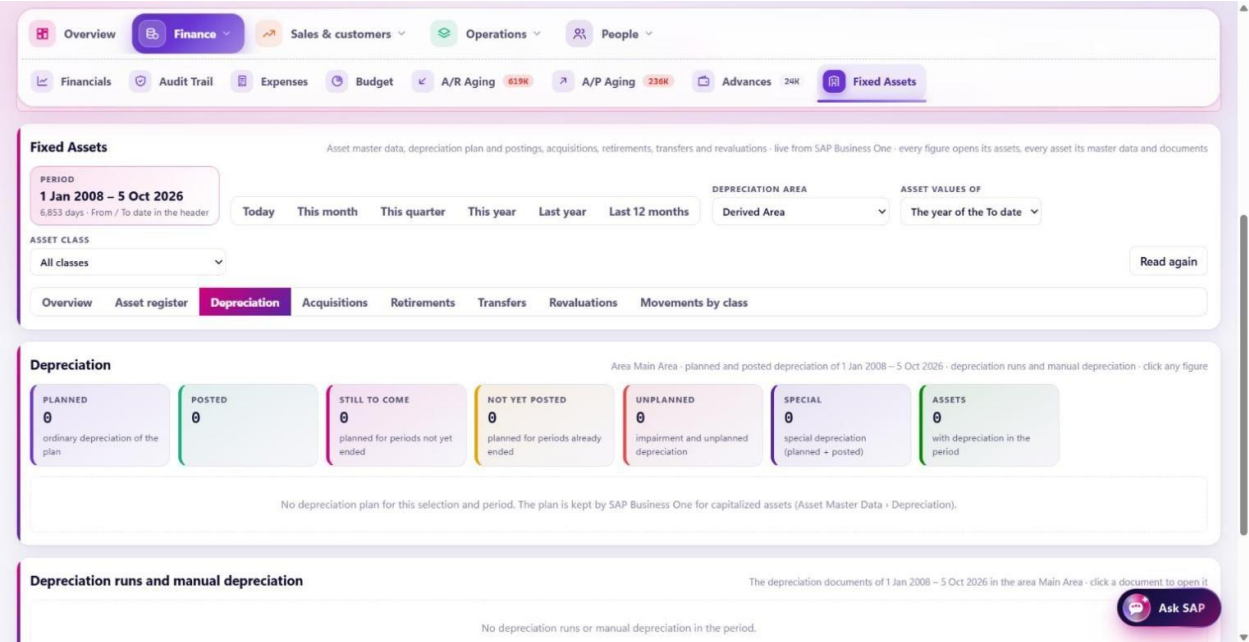


Figure 51. Depreciation

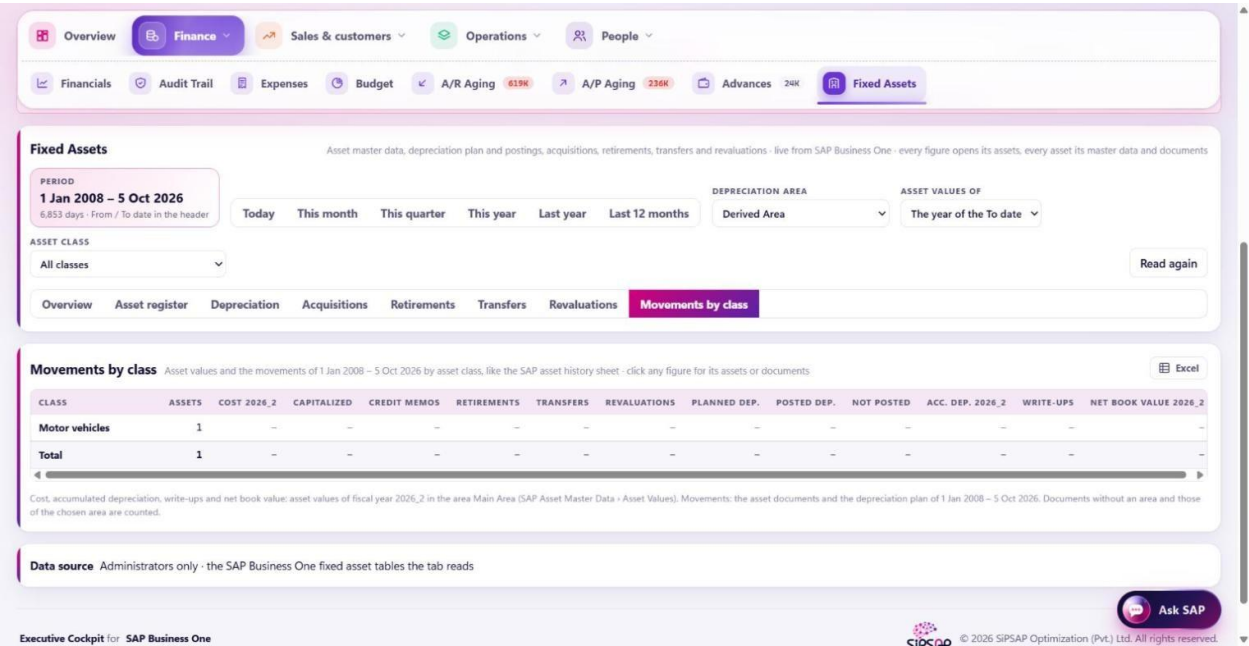


Figure 52. Movements by class

6. Sales & customers

6.1 Sales Analysis

Sales Analysis shows A/R invoices net of credit memos, or deliveries, orders or quotations. Choose the period (3, 6, 12, 24 months or all), net sales or gross profit, and how far ahead to project (3, 6 or 12 months). Key figures include net sales, gross margin, active customers, quote-to-order rate and the open order book.

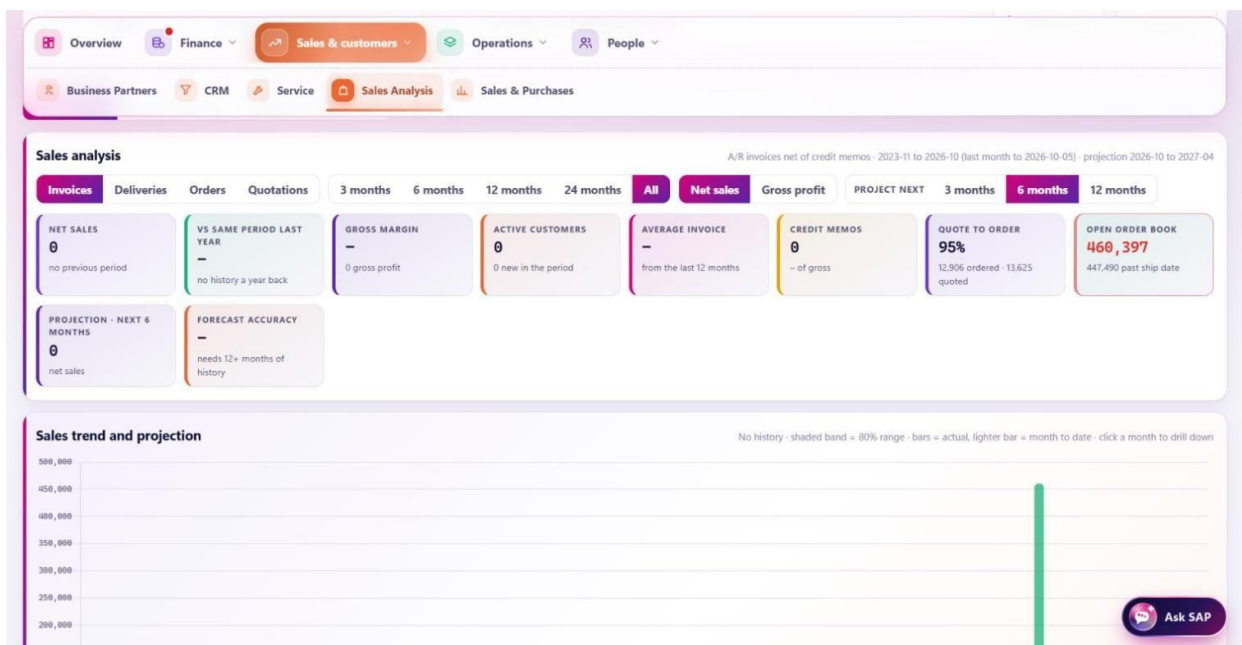


Figure 53. Sales analysis: measures, period and key figures

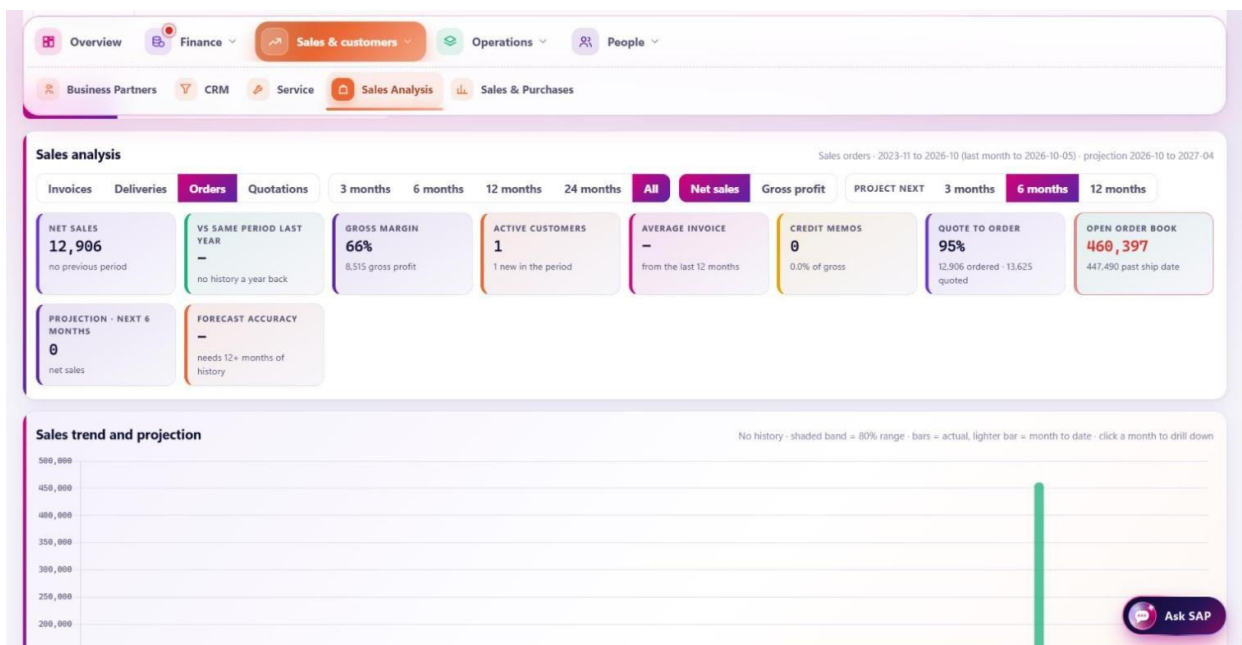


Figure 54. The Orders view

Sales trend and projection shows actual sales by month, open orders by ship date and a projection with an 80% range. Further down are year on year, seasonality, what changed (customers, price, volume and mix), top 15 customers and items, customer concentration (ABC), sales by group, a customer heat map, projection by customer, sales employee performance and the list of invoices and credit memos.

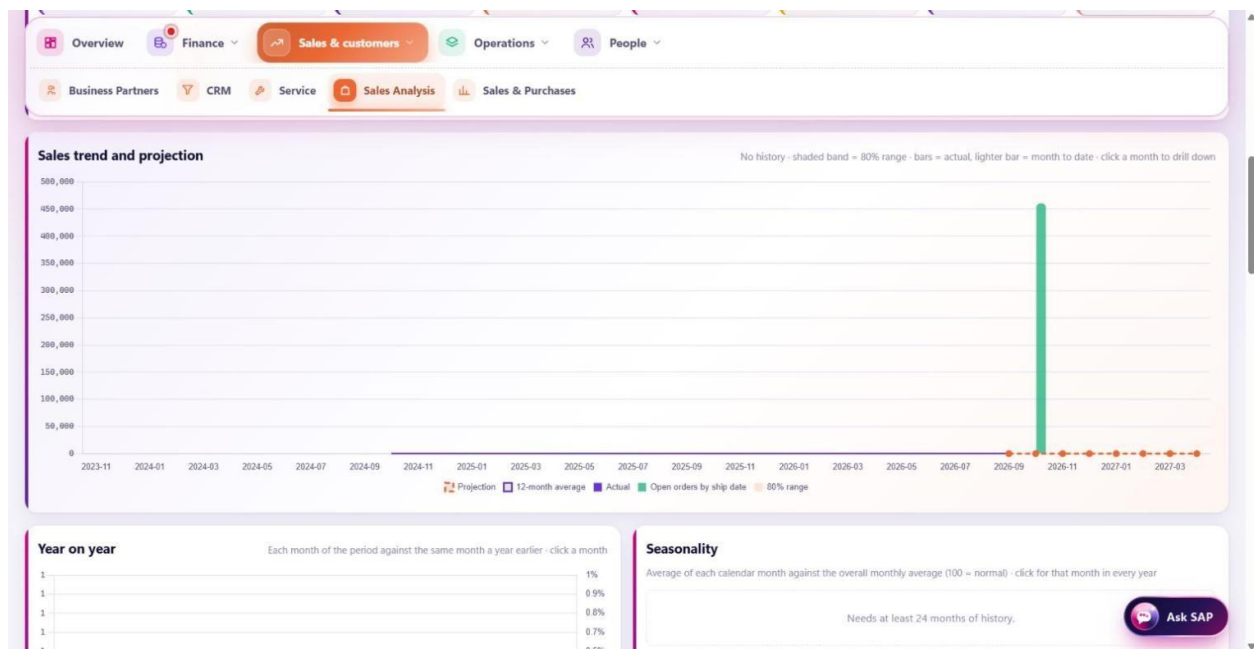


Figure 55. Sales trend and projection

The views **Today's sales · live** (sales of one day, with previous and next day) and **Returns & credit memos** read SAP directly.

6.2 Sales & Purchases

One chart of net sales and net purchases by month across the header dates, with a 3-month average of sales. Click a month for its documents.

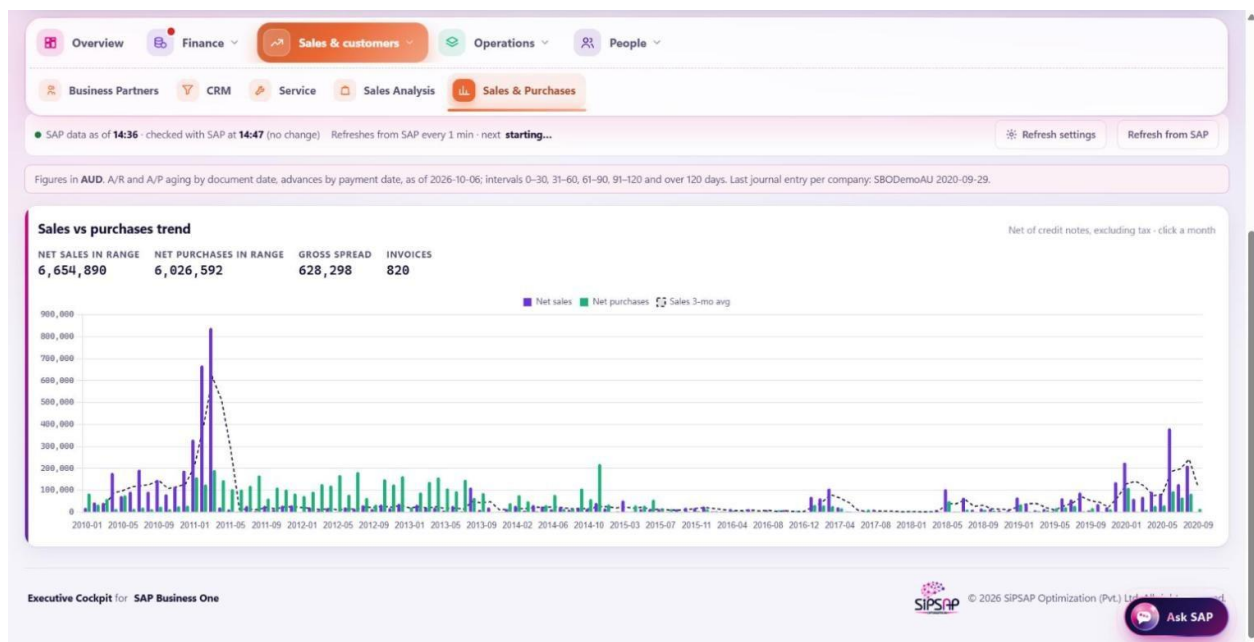


Figure 56. Sales vs purchases trend

6.3 Business Partners

Business Partners analyses customers or vendors over the last 12 months against the 12 months before. Key figures include active customers, 12-month sales, gross margin, top-10 share, days sales outstanding, average days to pay, overdue and open orders.

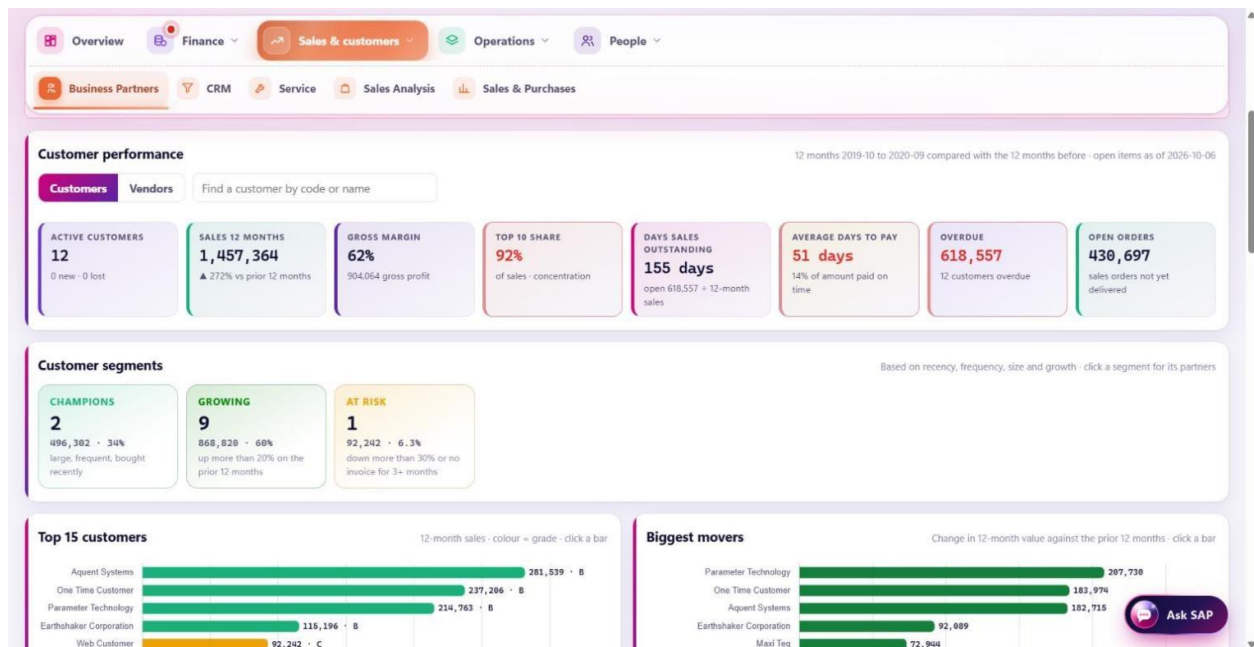


Figure 57. Customer performance

Customer segments groups customers into Champions, Growing and At risk. Top 15 customers and Biggest movers follow, then sales and active customers by month, value against payment speed, sales by group and a Pareto chart.

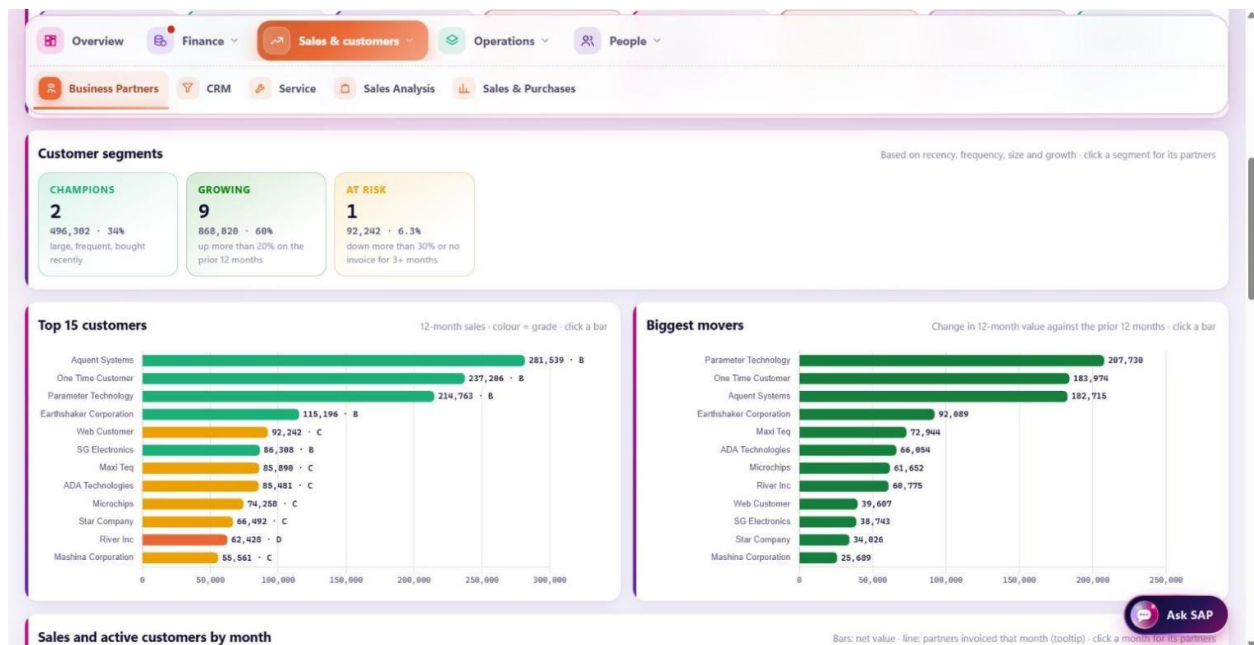


Figure 58. Segments, top customers and biggest movers

The **Customer scorecard** gives each customer a score from 0 to 100 (size 30%, margin 20%, paying on time 20%, frequency 15%, growth 15%) and a grade A–E. Filter by grade, search, or download as CSV.

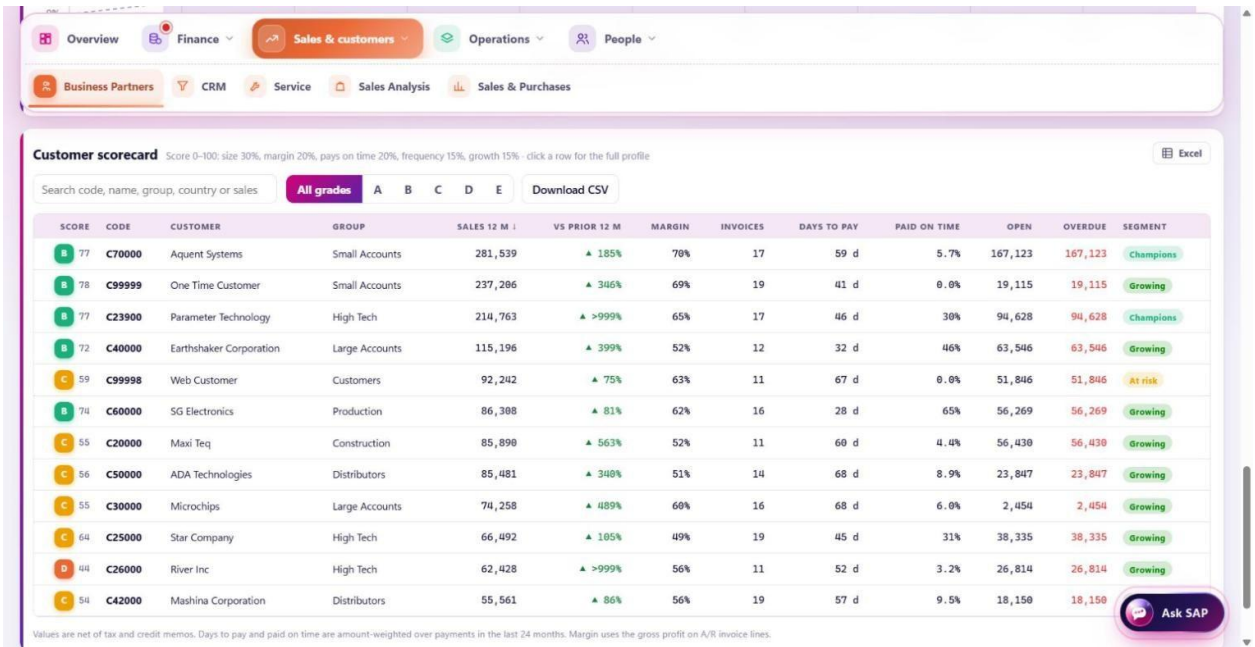


Figure 59. Customer scorecard

6.4 CRM

CRM analyses sales opportunities. Filter by period, status (all, open, won, lost) and sales employee. Key figures show opportunities, open and weighted pipeline, win rate, average won deal, sales cycle, closing in 90 days and past expected close.

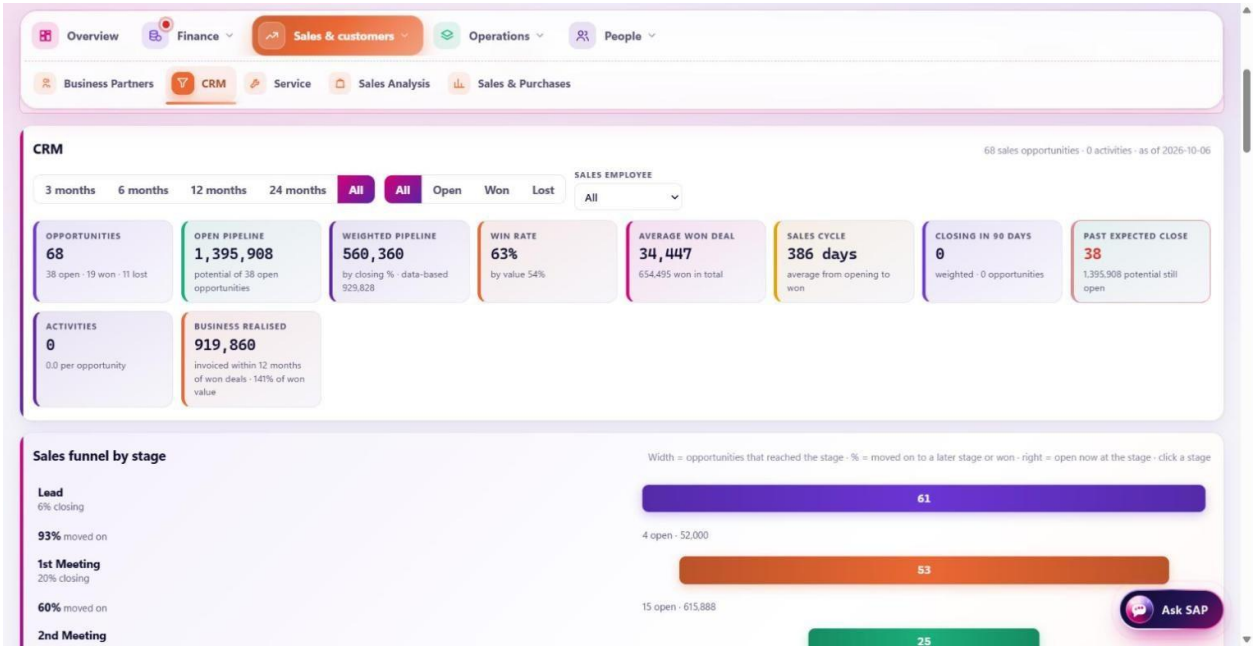


Figure 60. CRM key figures

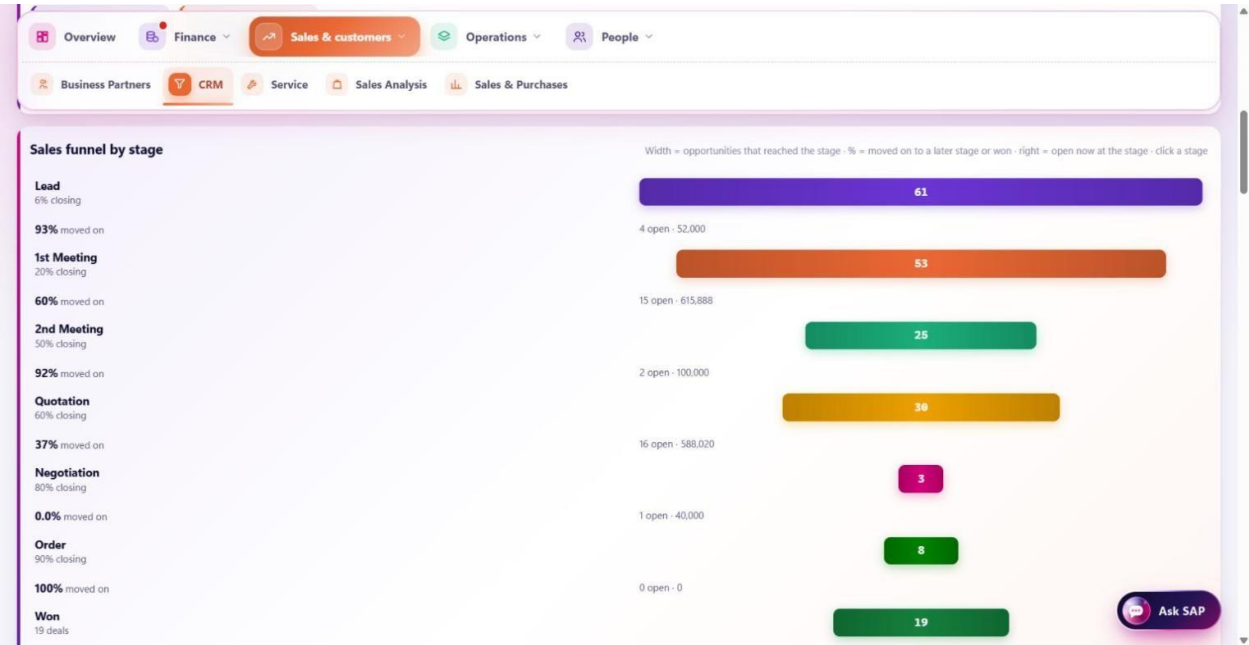


Figure 61. Sales funnel by stage, with the share that moved on

Further charts show the pipeline value three ways (full potential, weighted by closing %, expected from actual win rates), conversion potential by business partner, opened/won/lost by month, win rate by source and other dimensions, loss reasons and a lead analysis.

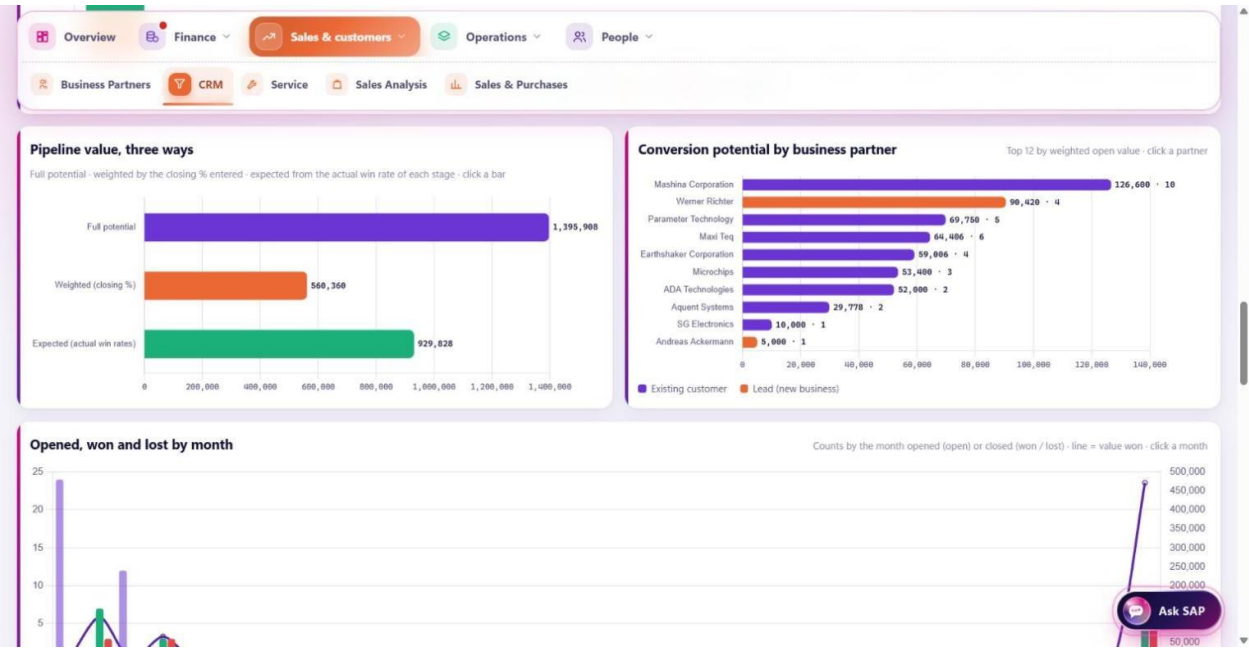


Figure 62. Pipeline value and conversion potential

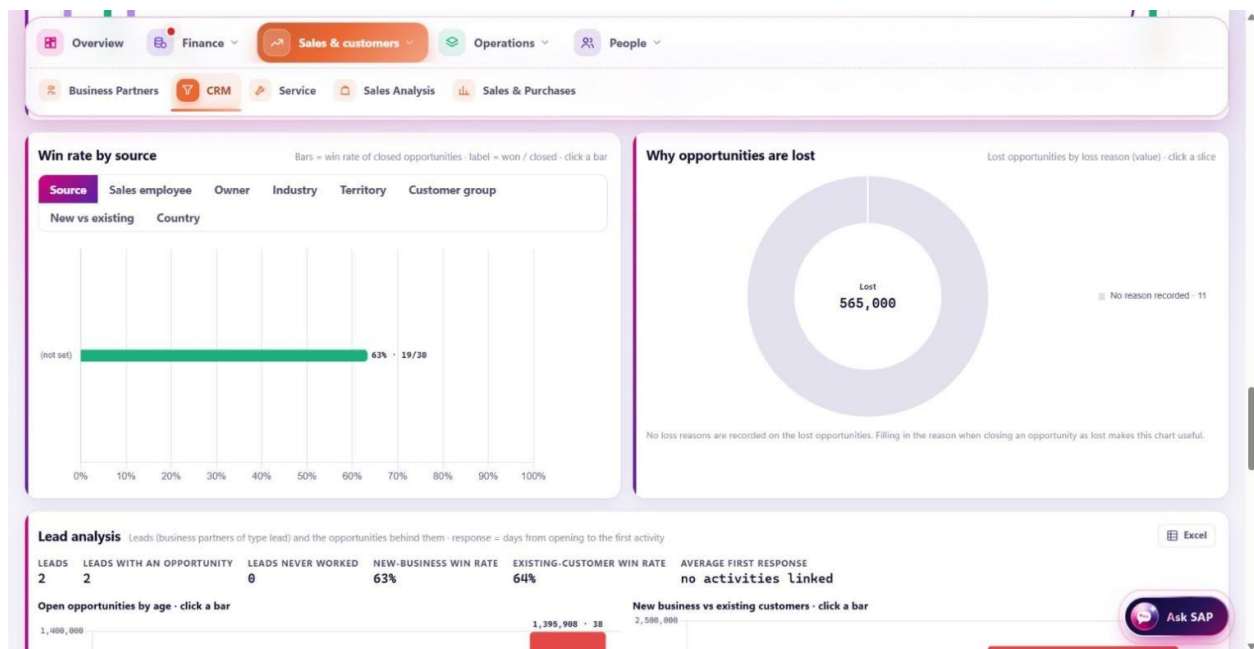


Figure 63. Win rate by source and why opportunities are lost

6.5 Service

Service reads service calls, customer equipment, contracts, the knowledge base and activities live from SAP Business One.

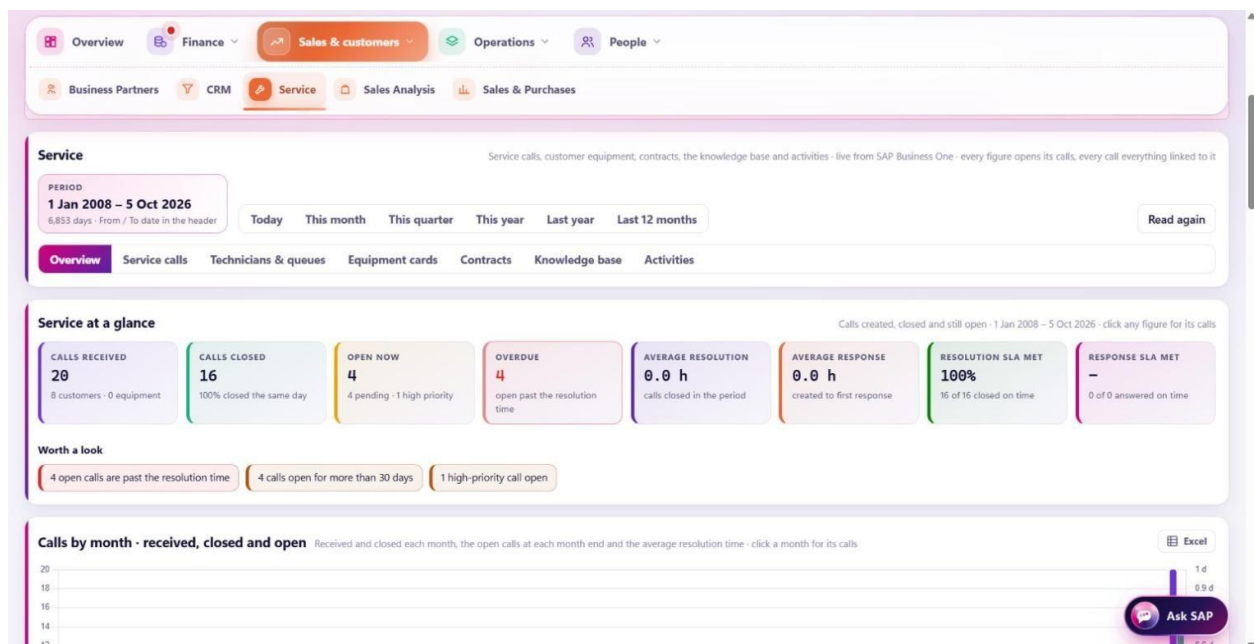


Figure 64. Service at a glance

View	What it shows
Overview	Calls received, closed, open and overdue, resolution and response times, SLA met, calls by month, problem types, priorities, origin and open calls by age
Service calls	Every call with customer, item, priority, type, technician, status and how long it has been open; filter by open, overdue, pending or closed
Technicians & queues	Calls received, closed, open and overdue per technician, assigned user and queue
Equipment cards	Customer equipment with serial numbers, status, contract and service calls

View	What it shows
Contracts	Service contracts in force or ending soon, with their calls
Knowledge base, Activities	Solutions used on calls, and the activities linked to calls

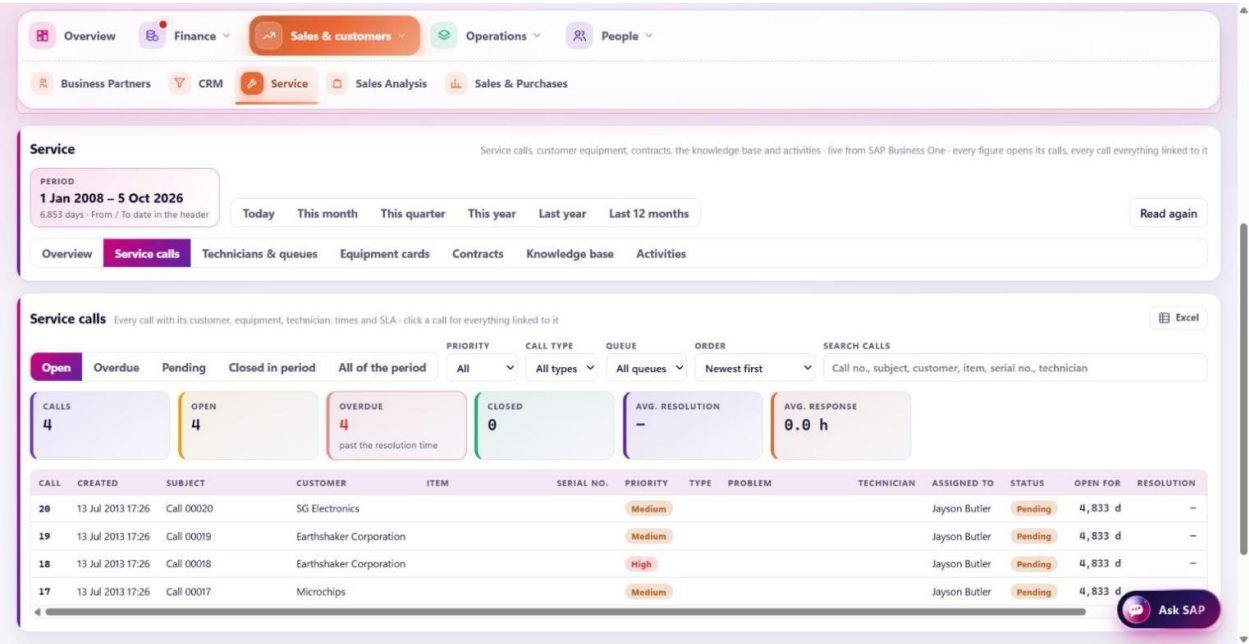


Figure 65. Service calls

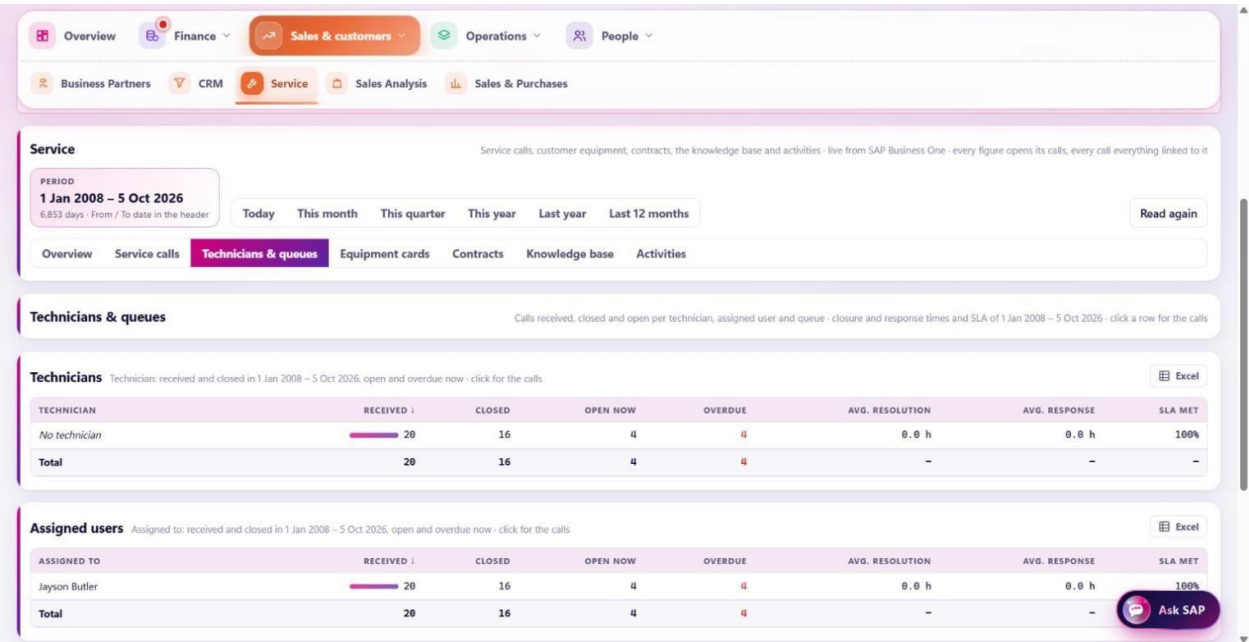


Figure 66. Technicians and queues

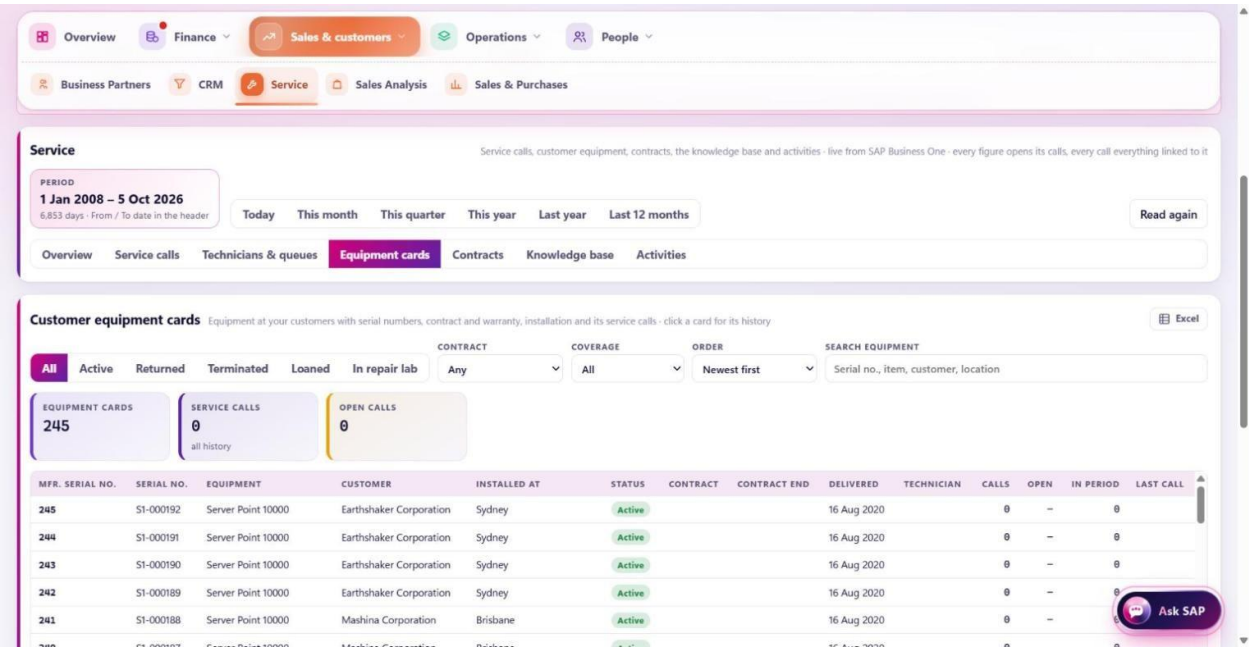


Figure 67. Customer equipment cards

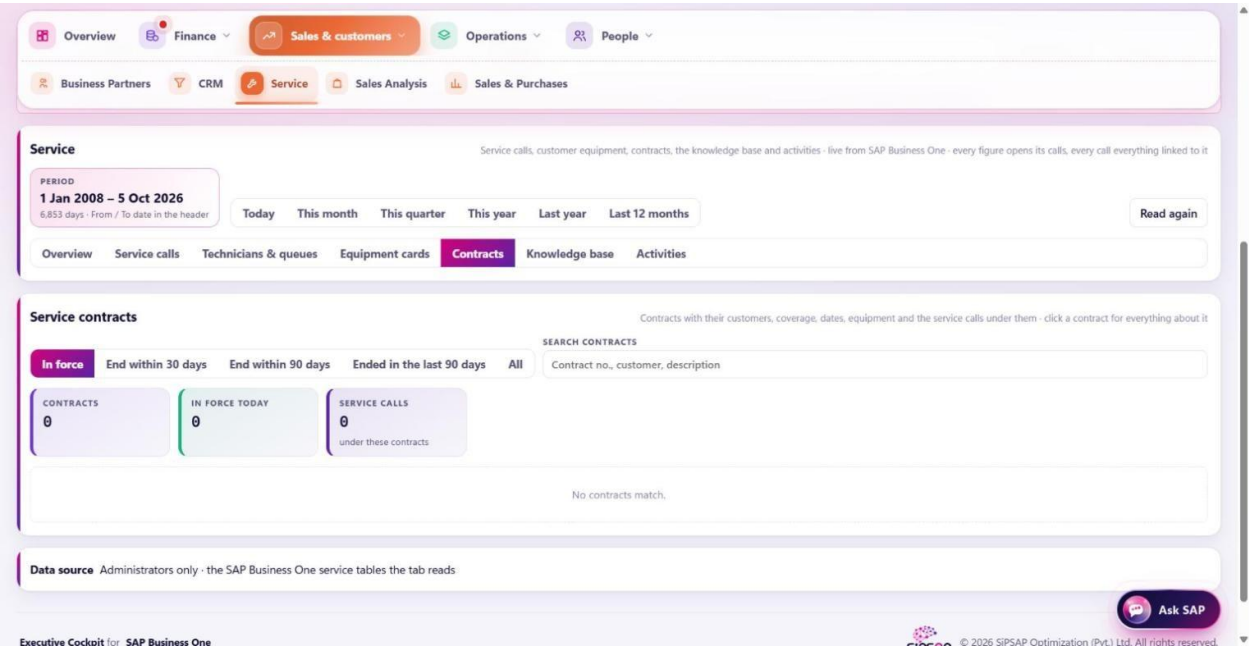


Figure 68. Service contracts

7. Operations

7.1 Purchase Analysis

Purchase Analysis shows A/P invoices net of returns and credit memos, goods receipts or purchase orders. Key figures include purchases, vendors, the imported share (foreign currency), price increases and decreases, and landed costs.

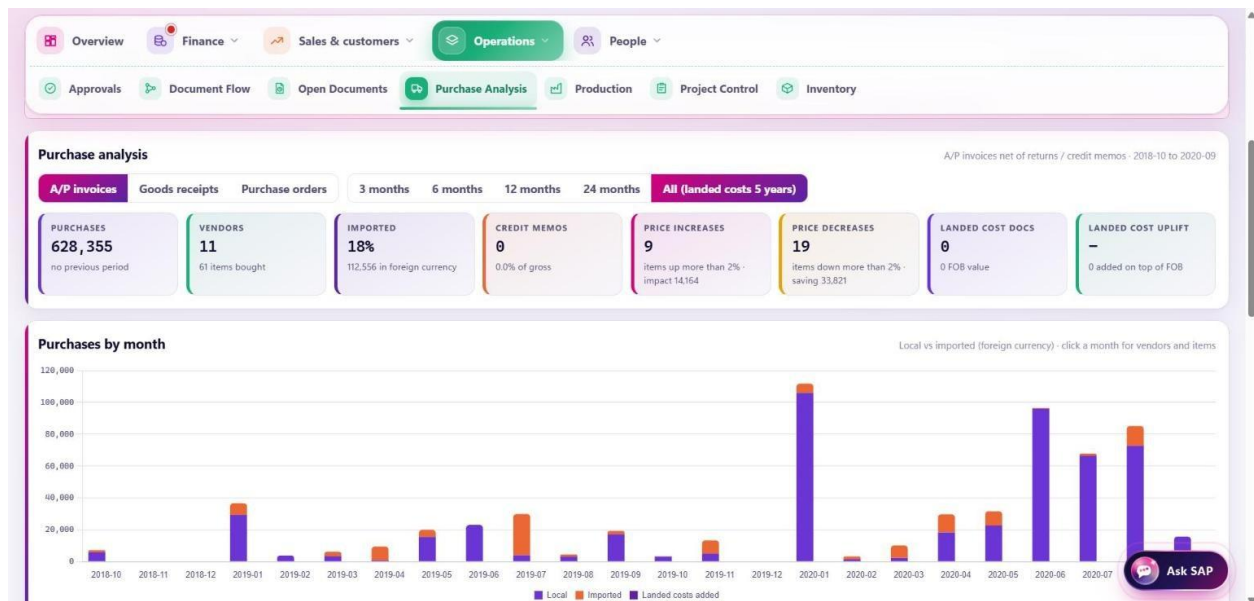


Figure 69. Purchase analysis and purchases by month

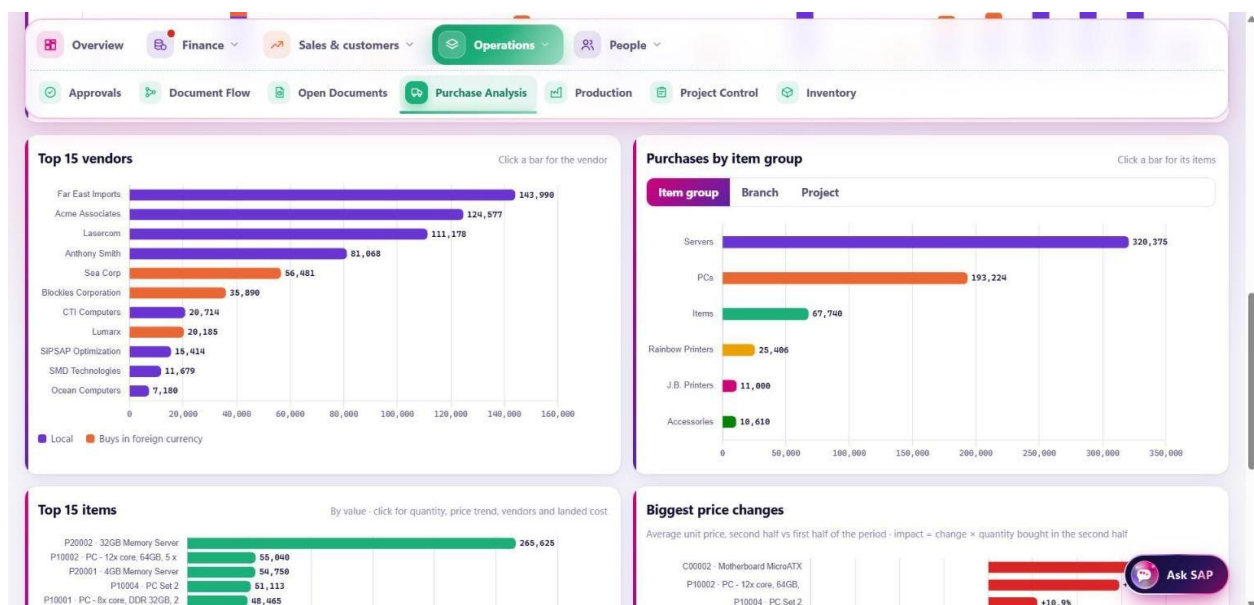


Figure 70. Top vendors and purchases by item group, branch or project

Biggest price changes compares the average unit price of the second half of the period with the first half. **Landed cost analysis** shows FOB value plus allocated expenses and customs.

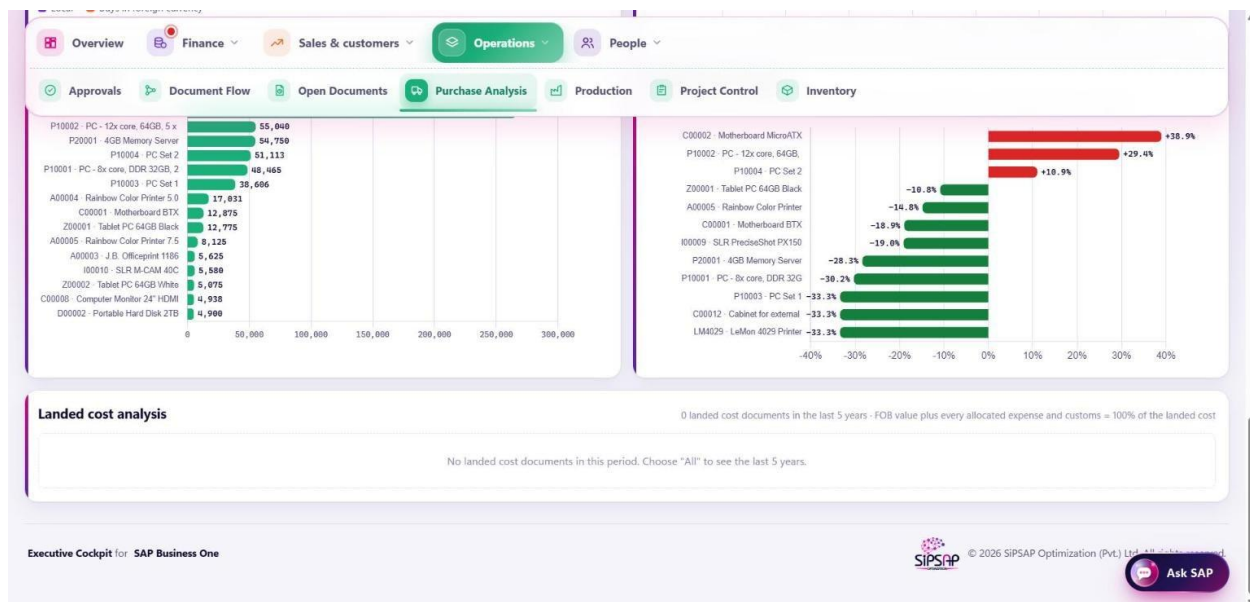


Figure 71. Top items, biggest price changes and landed cost

7.2 Inventory

Inventory has three views. **Stock and planning** values stock and plans what to order. Choose the warehouse, item group, default lead time, service level and planning horizon.

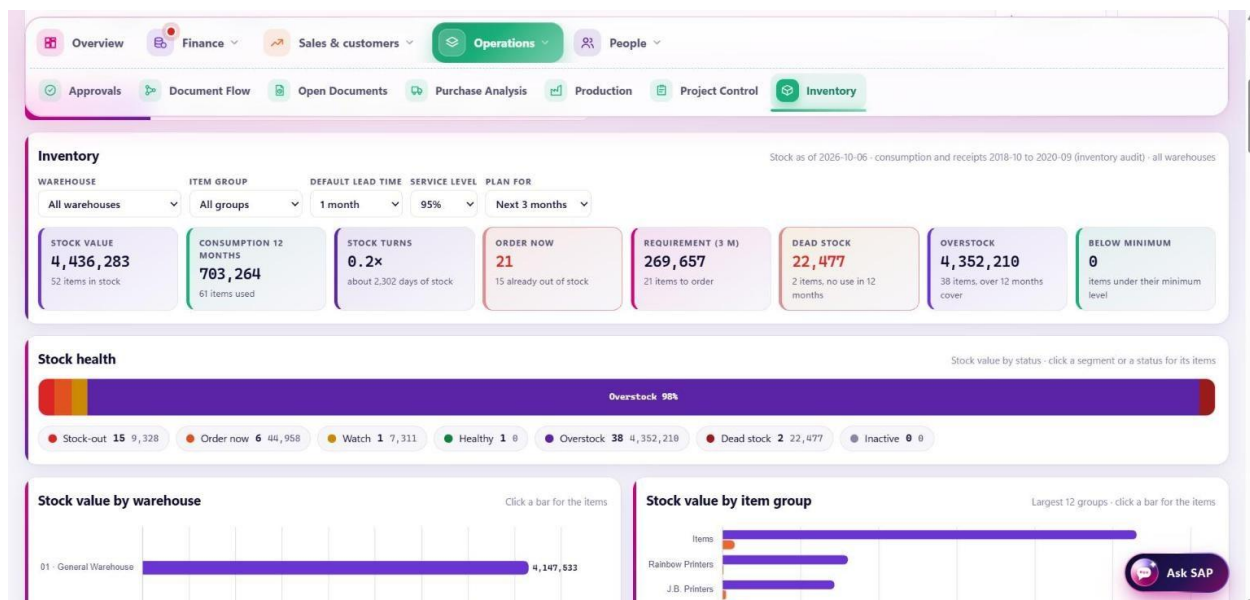


Figure 72. Stock and planning: key figures and stock health

Stock health splits stock value into stock-out, order now, watch, healthy, overstock, dead stock and inactive. Further charts show stock by warehouse and item group, consumption and receipts by month, ABC analysis, demand pattern and the most consumed items, plus batches and serial numbers.

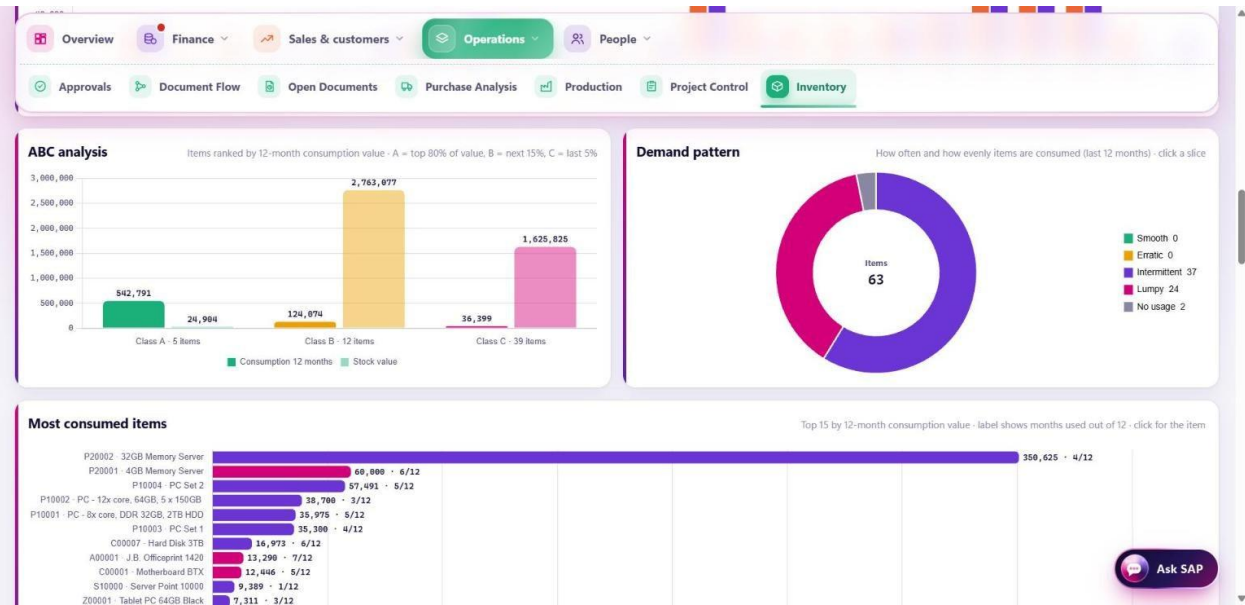


Figure 73. ABC analysis, demand pattern and most consumed items

The **Requirement projection** suggests what to order: forecast plus safety stock minus available stock, with the reorder point, suggested quantity, value and the date stock runs out. Download it as CSV for Excel.

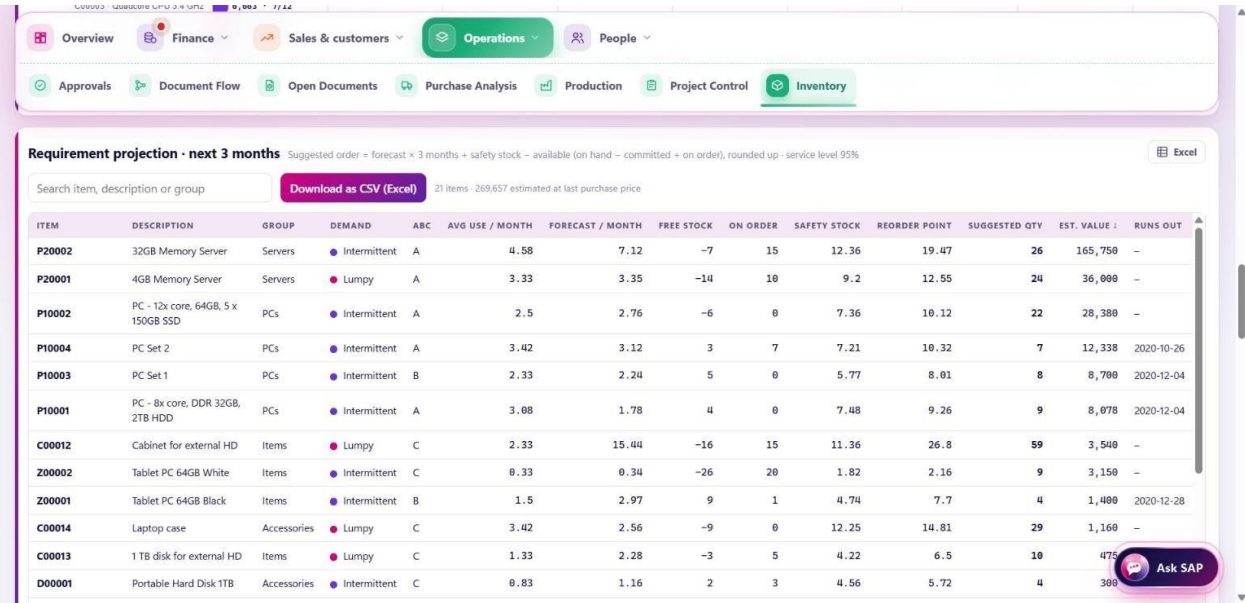


Figure 74. Requirement projection

Transactions shows goods receipts, goods issues, transfer requests, transfers, stock counting and stock posting. **Document flow** shows how requests, transfers, production orders, issues, receipts and counts follow each other.

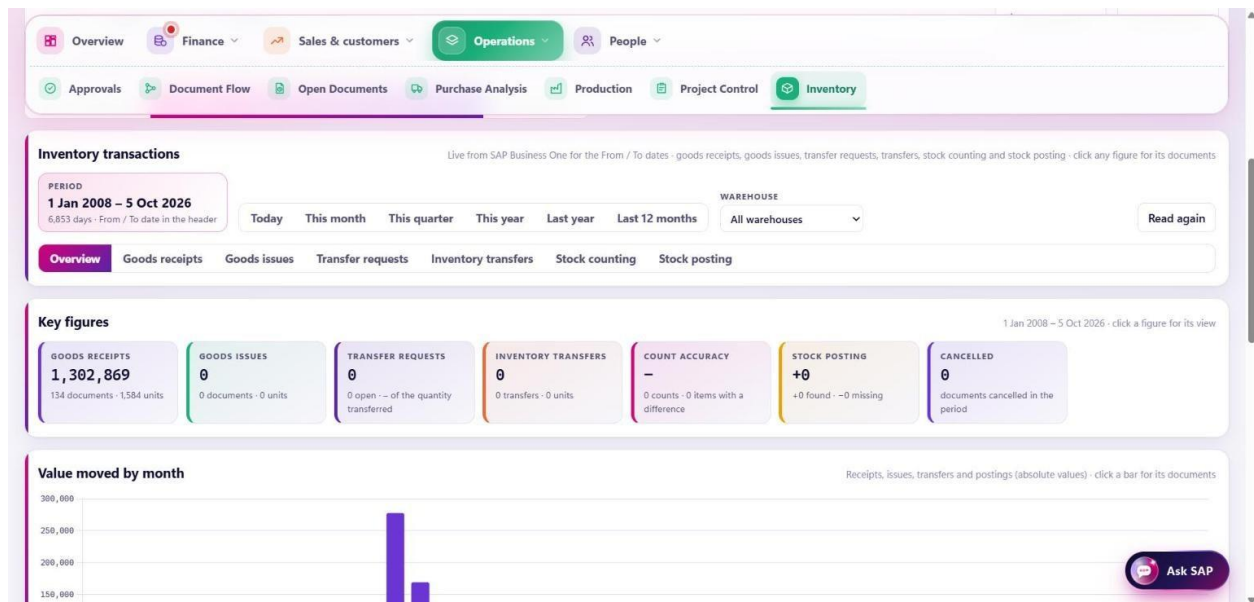


Figure 75. Inventory transactions

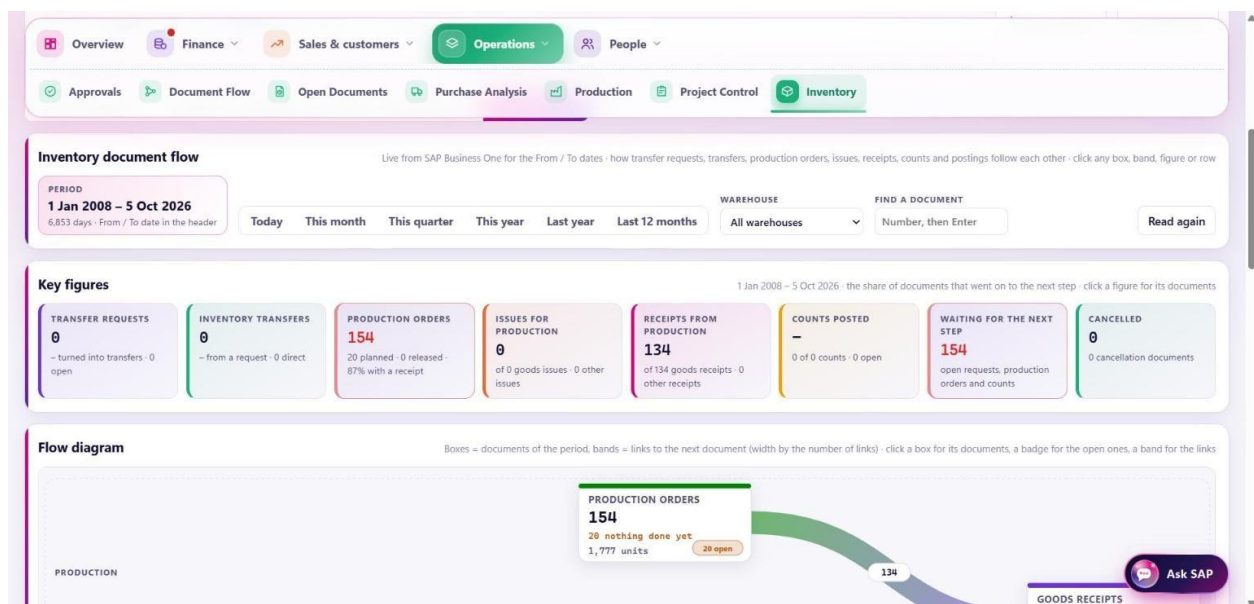


Figure 76. Inventory document flow

7.3 Production

Production analyses production orders: output, plan attainment, scrap, on-time completion, cycle time and cost variances, with variance by product and component, schedule performance and open orders.

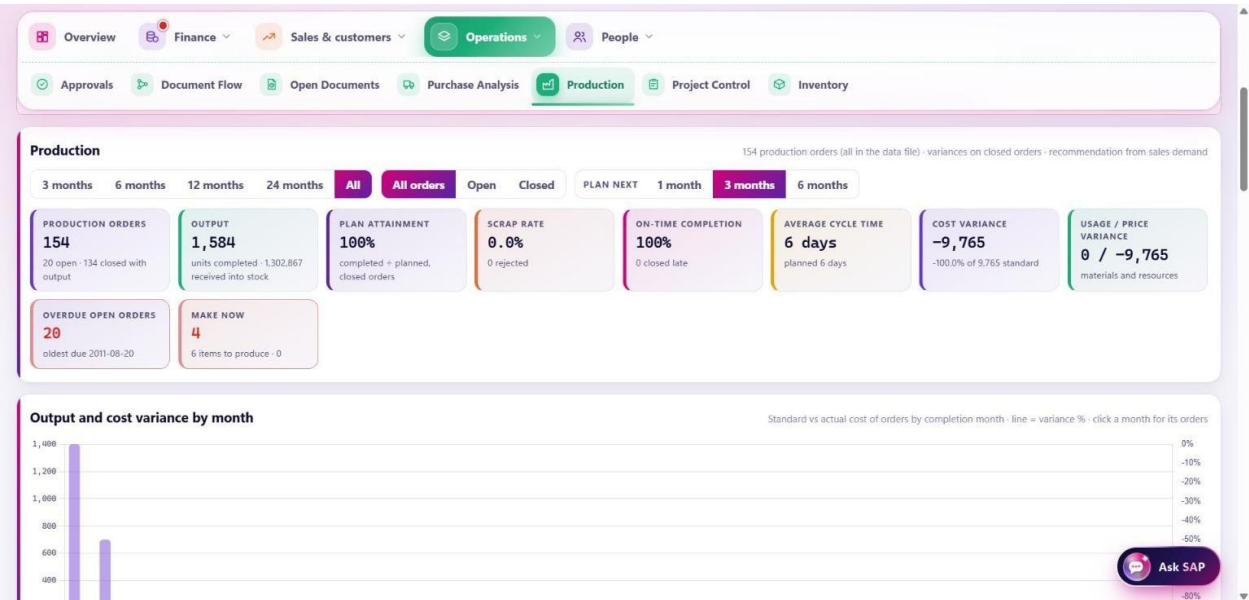


Figure 77. Production key figures

The **Production recommendation** forecasts demand from sales and suggests what to make in the next 1, 3 or 6 months, checks the materials against free stock and marks each product Urgent, Plan or Covered.

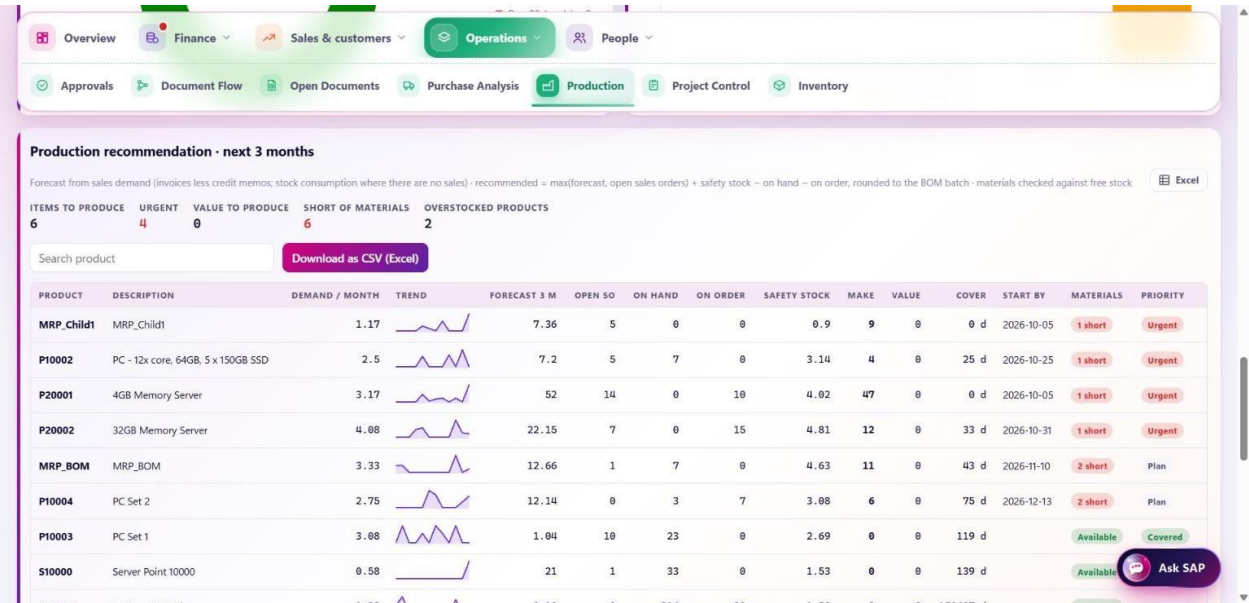


Figure 78. Production recommendation

7.4 Project Control

Project Control reads SAP Business One Project Management: projects, stages, open issues, documents, activities and costs. Filter by status, health, type or search. Key figures show projects on track, at risk and overdue, average progress, stages, open issues and planned, actual and committed cost.

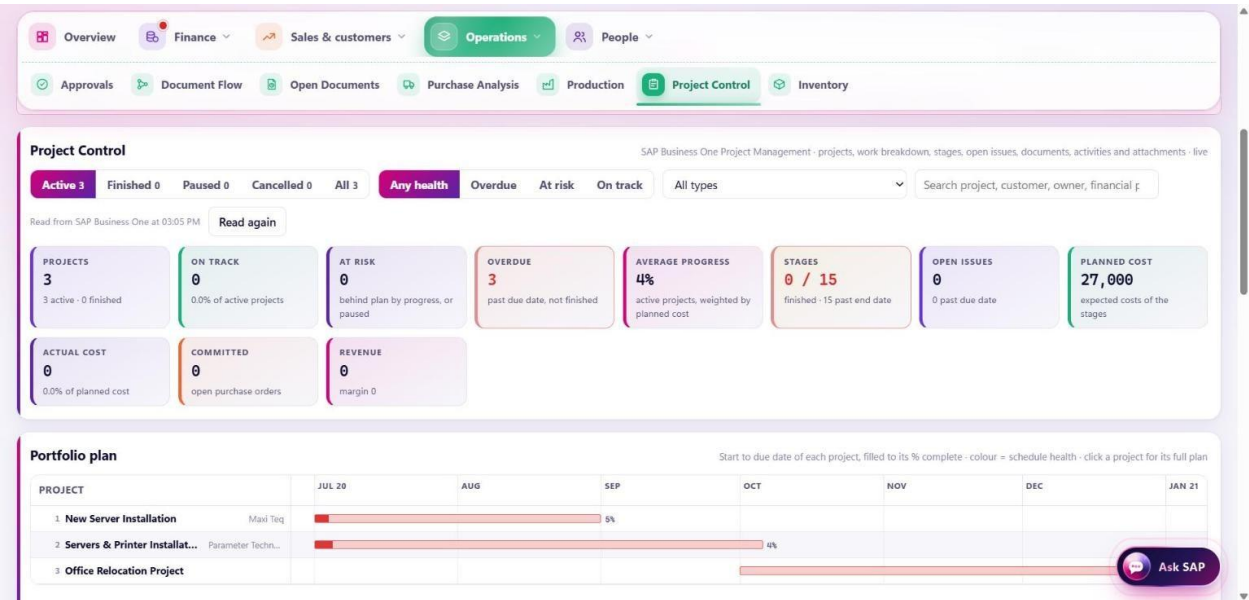


Figure 79. Project Control and the portfolio plan

The portfolio plan shows each project from start to due date, filled to its % complete and coloured by schedule health. Click a project for its plan, stages, issues, documents and financials.

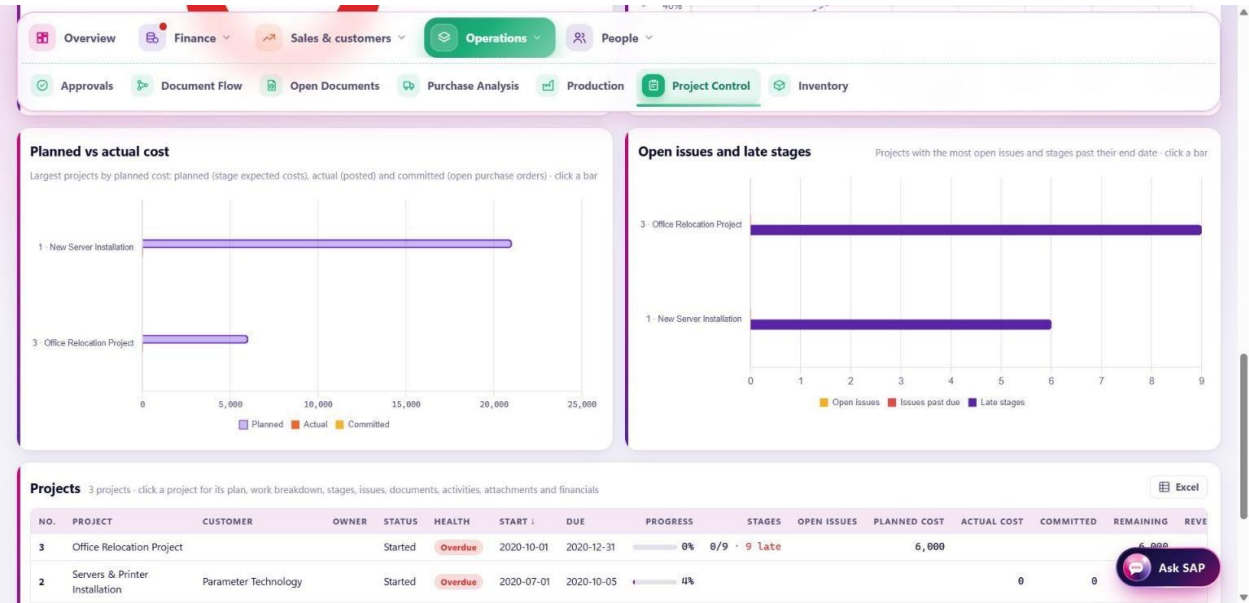


Figure 80. Planned vs actual cost, open issues and the project list

7.5 Open Documents

Open Documents analyses the SAP Business One Open Items List: every open quotation, order, delivery, invoice, request and return. Filter by sales, purchasing or inventory, by document type chip, by date or overdue only, or search.

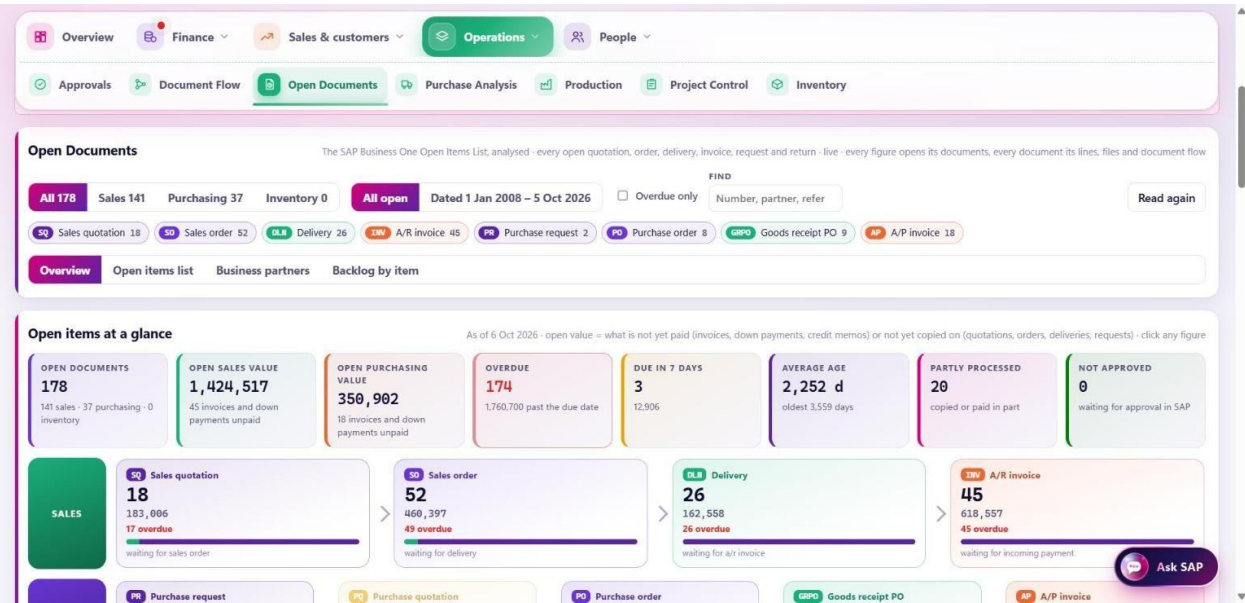


Figure 81. Open items at a glance, with the sales and purchasing chain

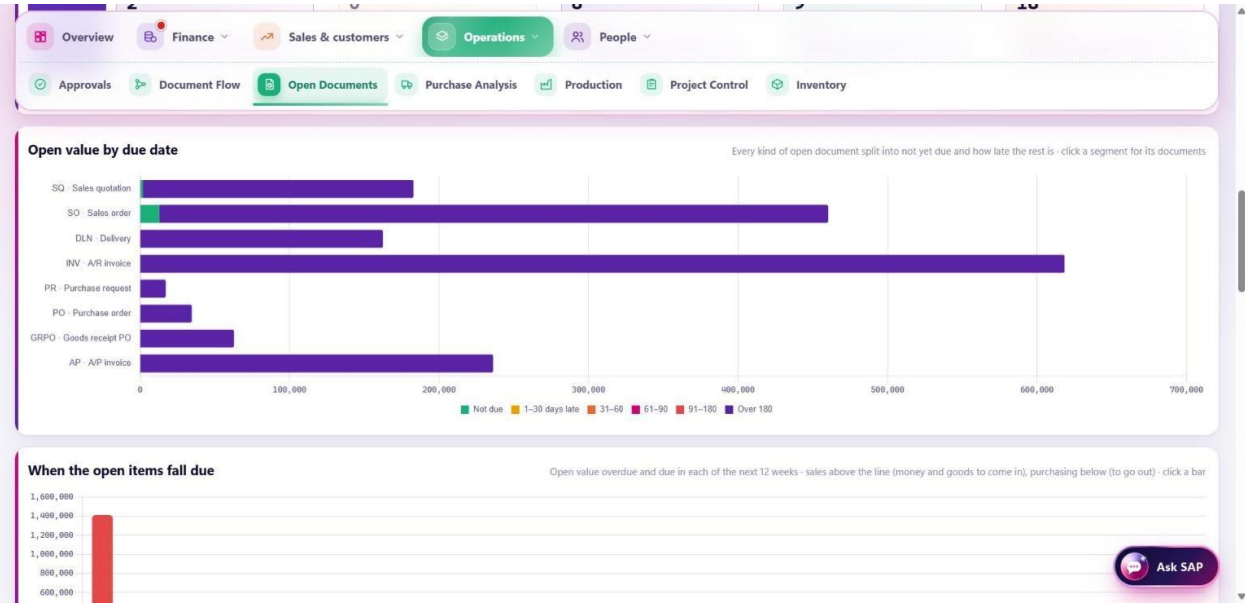


Figure 82. Open value by due date

The views **Open items list**, **Business partners** and **Backlog by item** list the documents, the partners with the most open items and the open quantity per item.

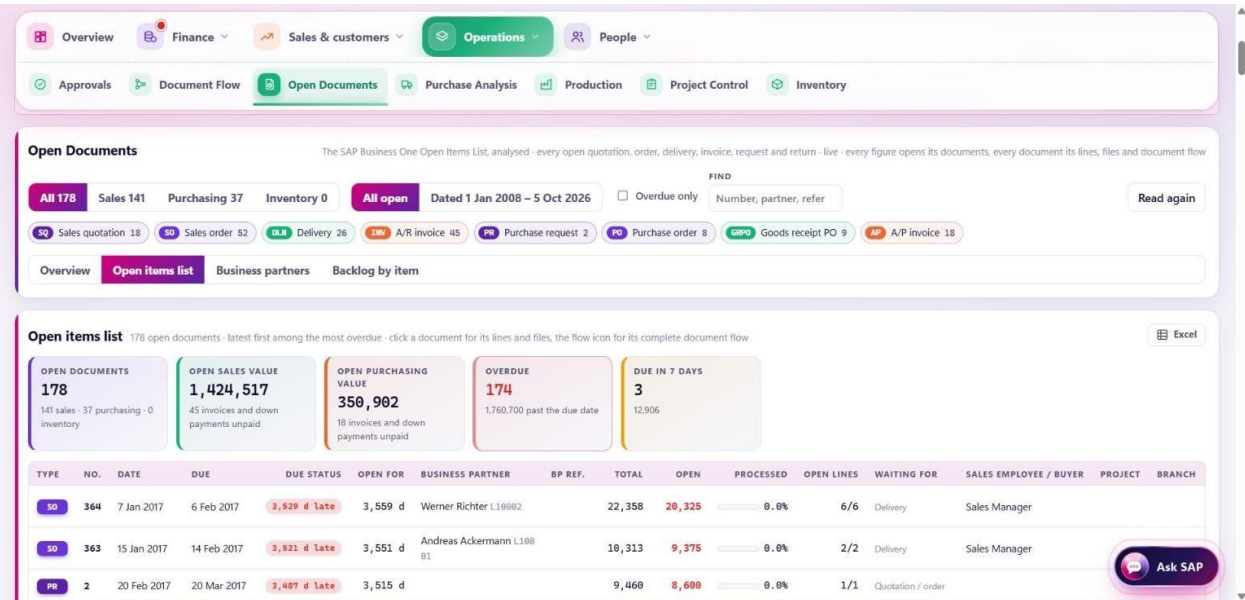


Figure 83. Open items list

7.6 Document Flow

Document Flow follows sales documents (quotation to incoming payment) or purchasing documents through their stages. It shows how many move on to the next stage, the days between stages and what is waiting.

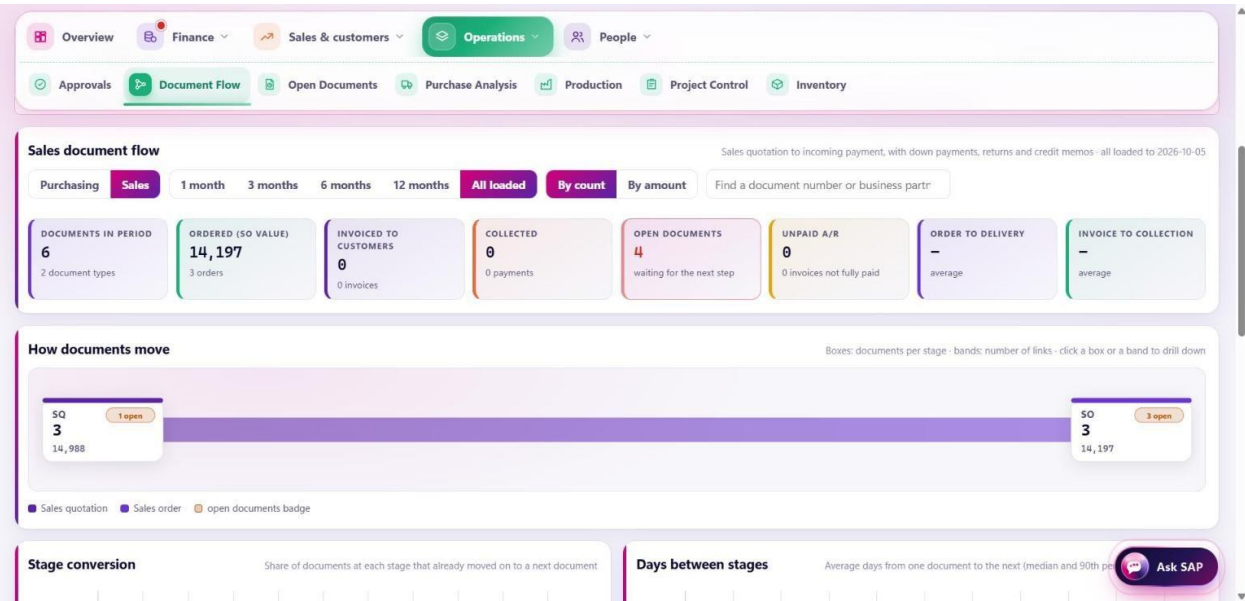


Figure 84. Sales document flow

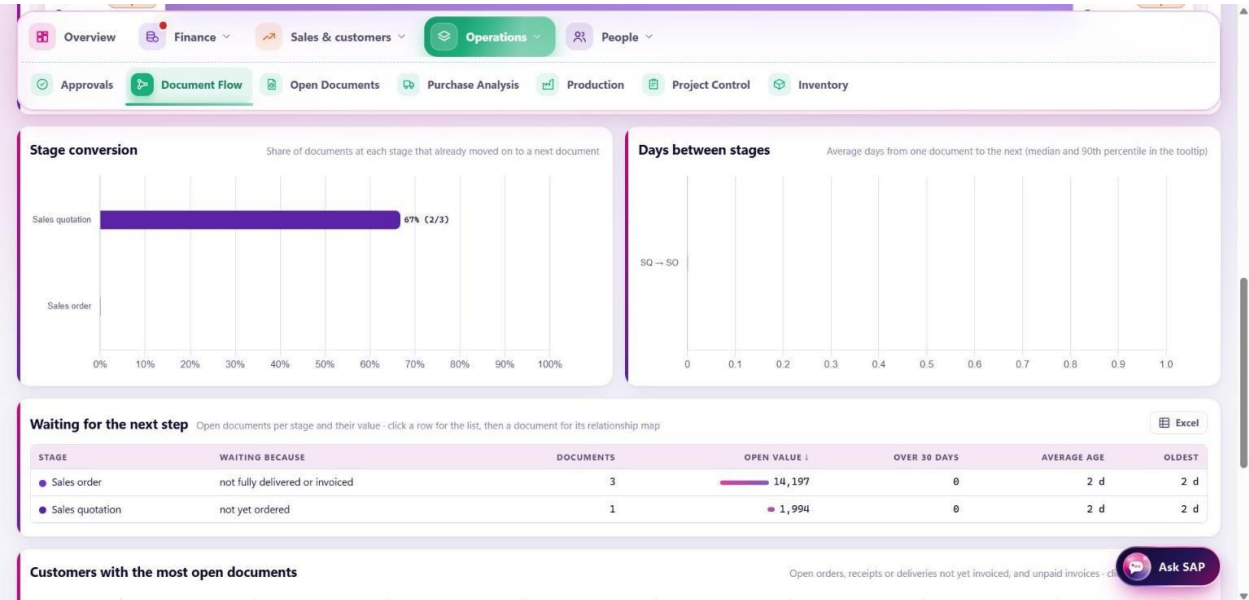


Figure 85. Stage conversion, days between stages and waiting for the next step

7.7 Approvals

Approvals shows the SAP Business One approval procedures: pending requests and how long they wait, approved and rejected, decision times, requests by document type and an approver scorecard.

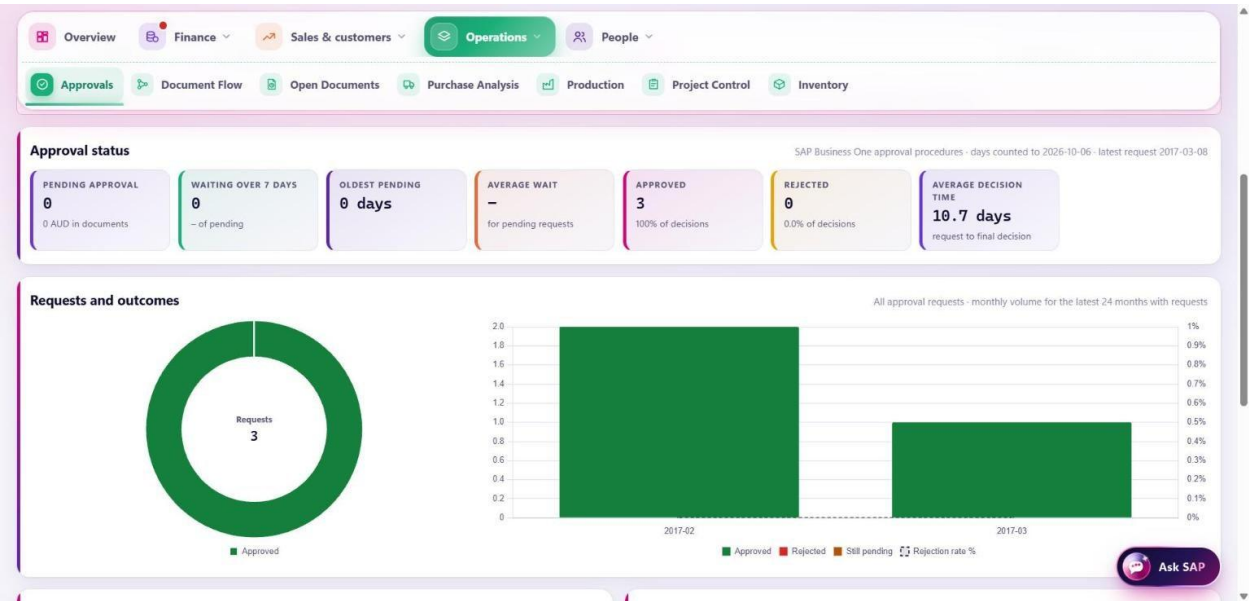


Figure 86. Approval status and requests

8. People

The People area reads the payroll database live. Both tabs have filters for department, branch, project and location, and the period buttons. Salary data is only sent to users who have the Payroll or Employees tab.

8.1 Employees

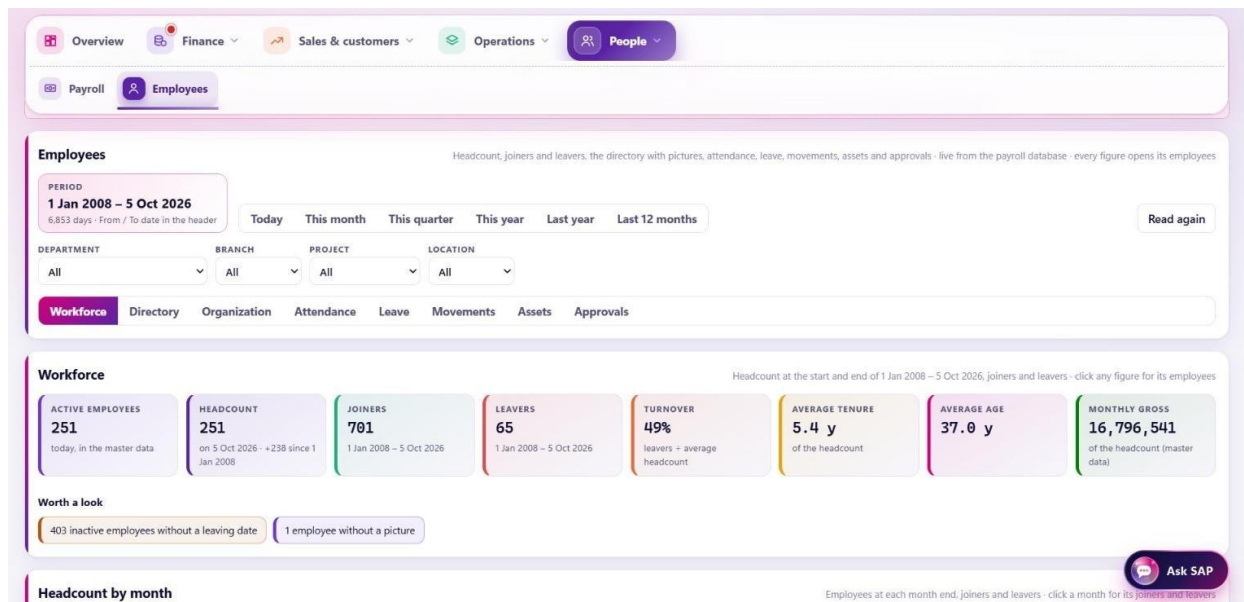


Figure 87. Employees: Workforce

View	What it shows
Workforce	Active employees, headcount, joiners, leavers, turnover, tenure, age and monthly gross, with breakdowns by department, branch, project, location, position, gender and more
Directory	Every employee as a card with picture, position, department and service, or as a table; search and filter
Organization	Departments, sub-departments and positions with their people
Attendance	Attendance of a day from the attendance machines: came in, on time, late, absent, no punch-out
Leave	Leave requests by type and status, leave days by month and who is on leave today
Movements, Assets, Approvals	Transfers and promotions, assets issued to employees and HR approvals

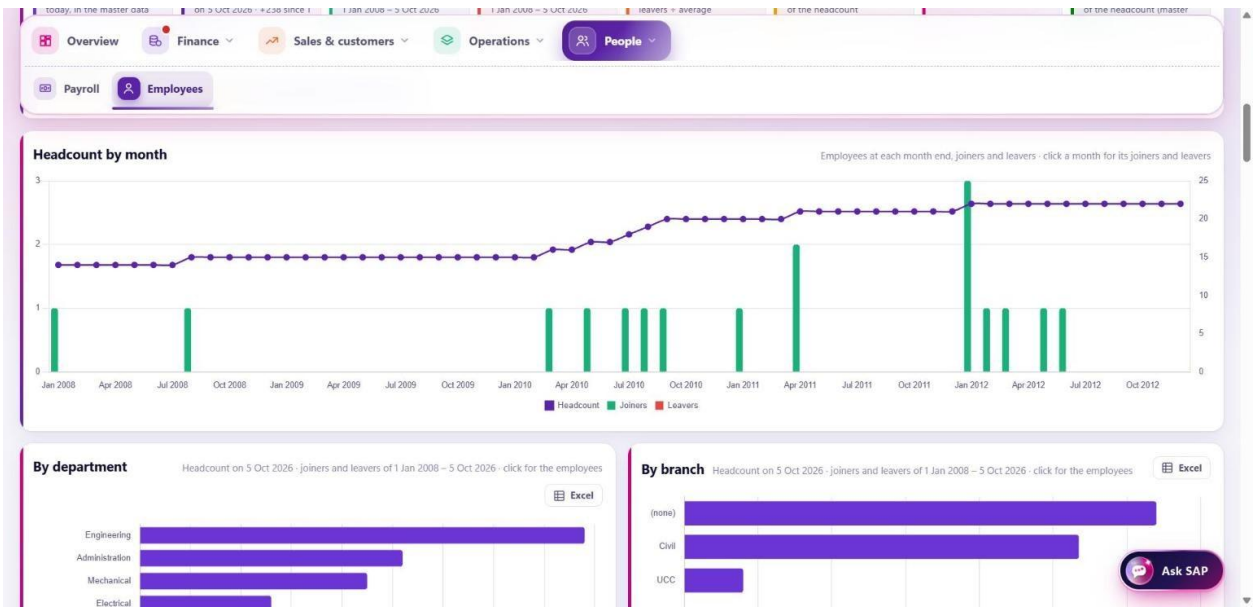


Figure 88. Headcount by month and by department

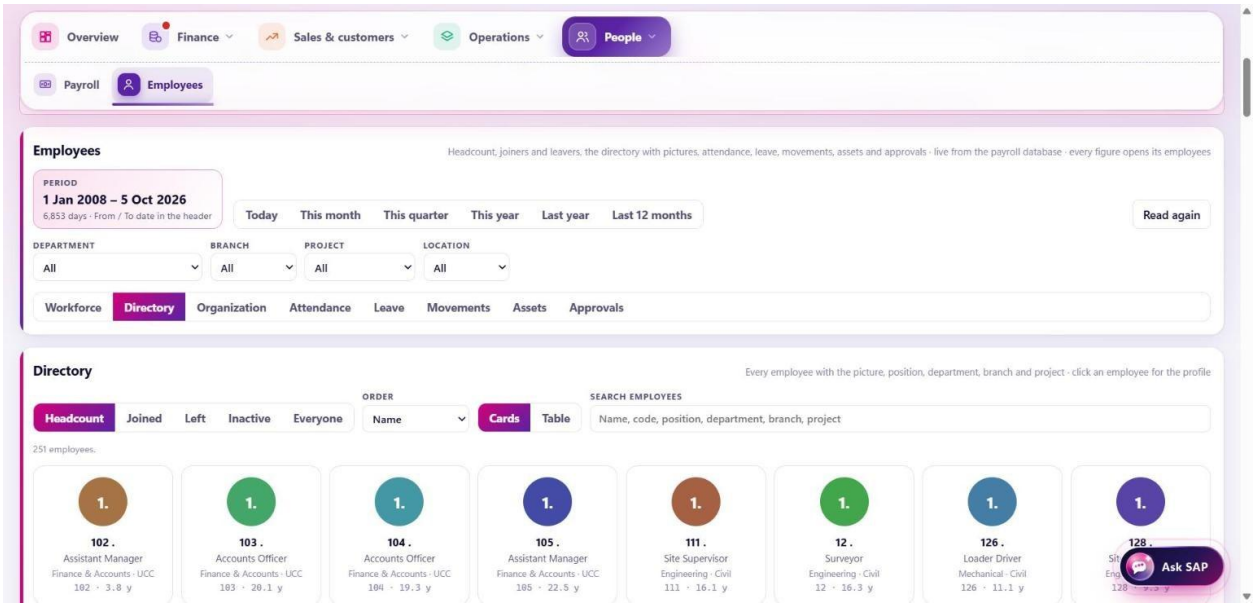


Figure 89. Directory

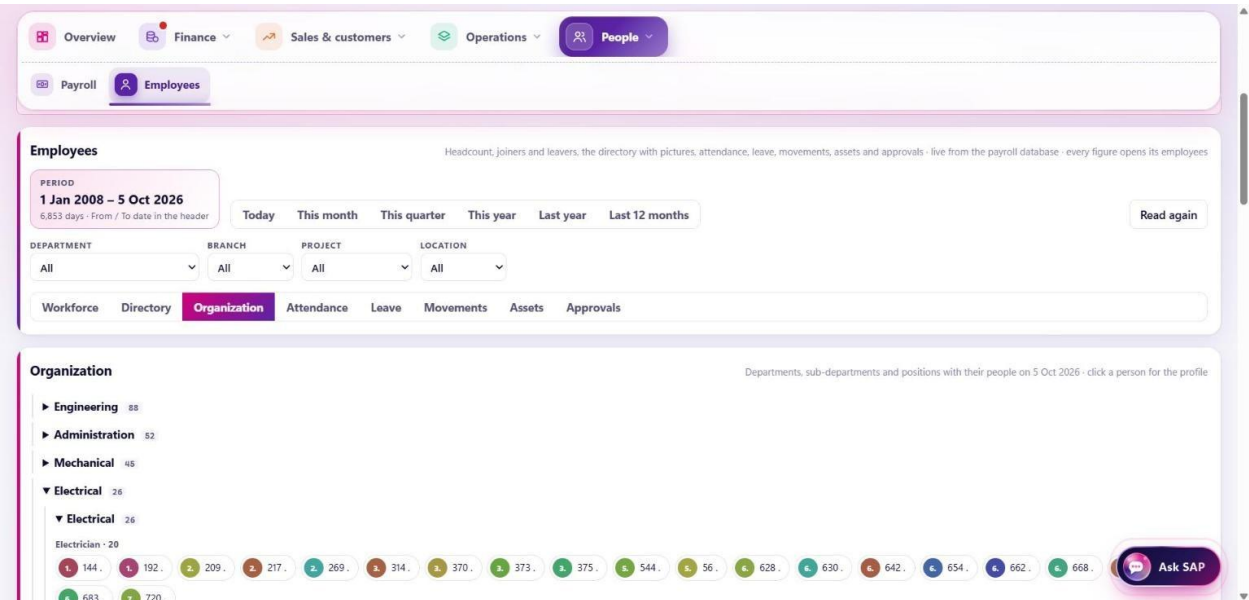


Figure 90. Organization

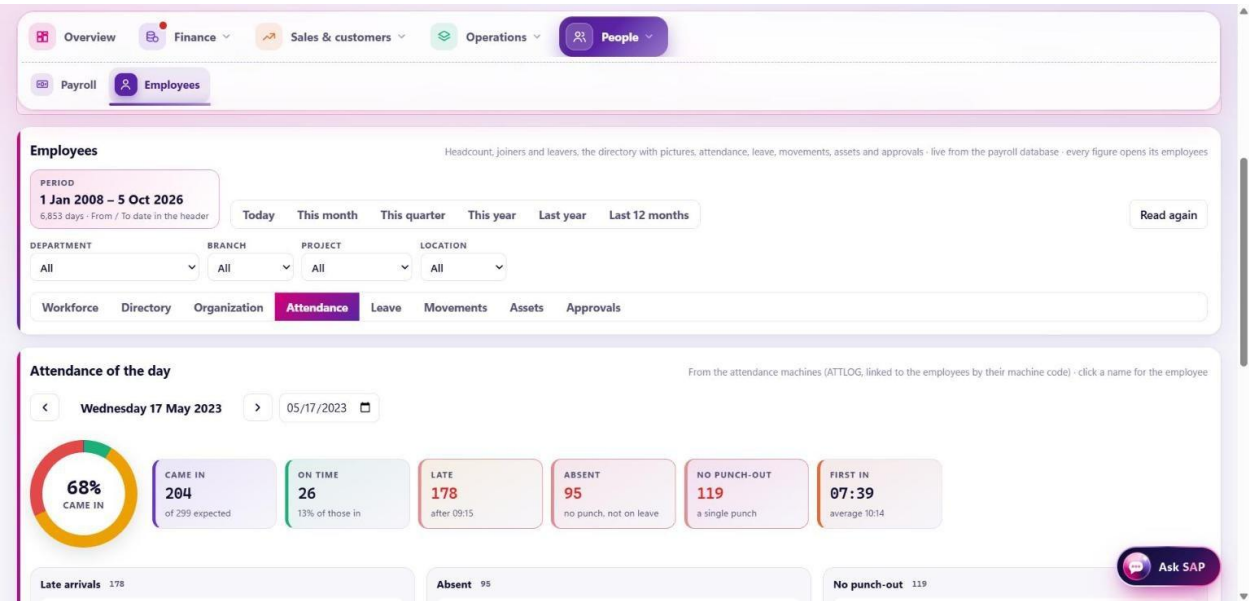


Figure 91. Attendance of the day

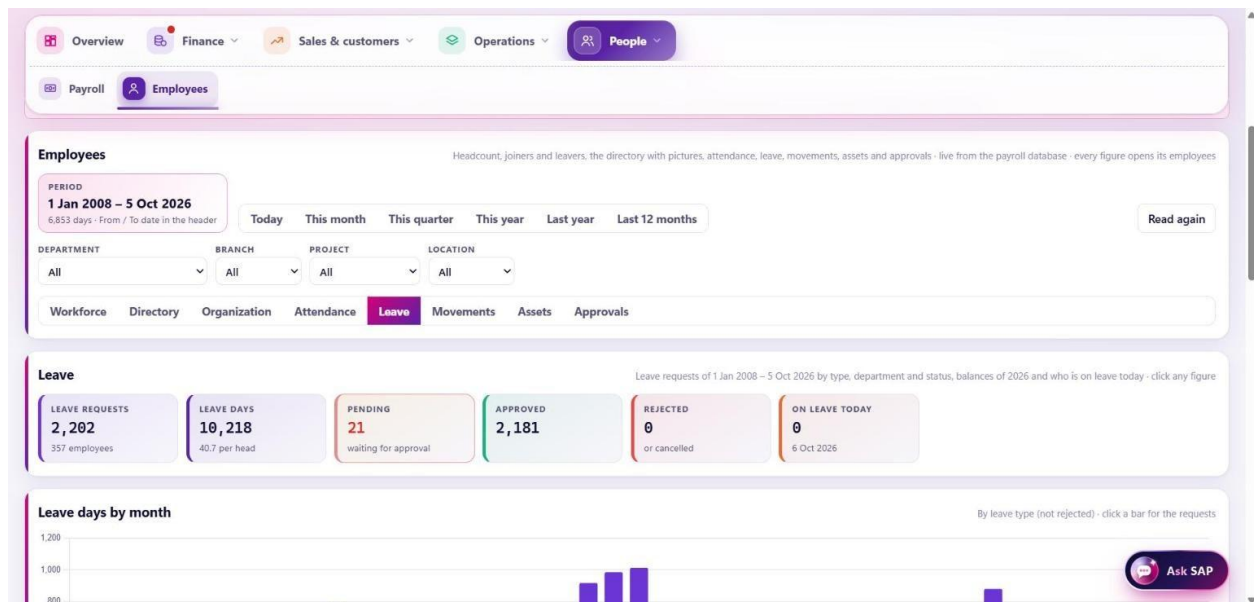


Figure 92. Leave

Click any employee for the full employee profile.

8.2 Payroll

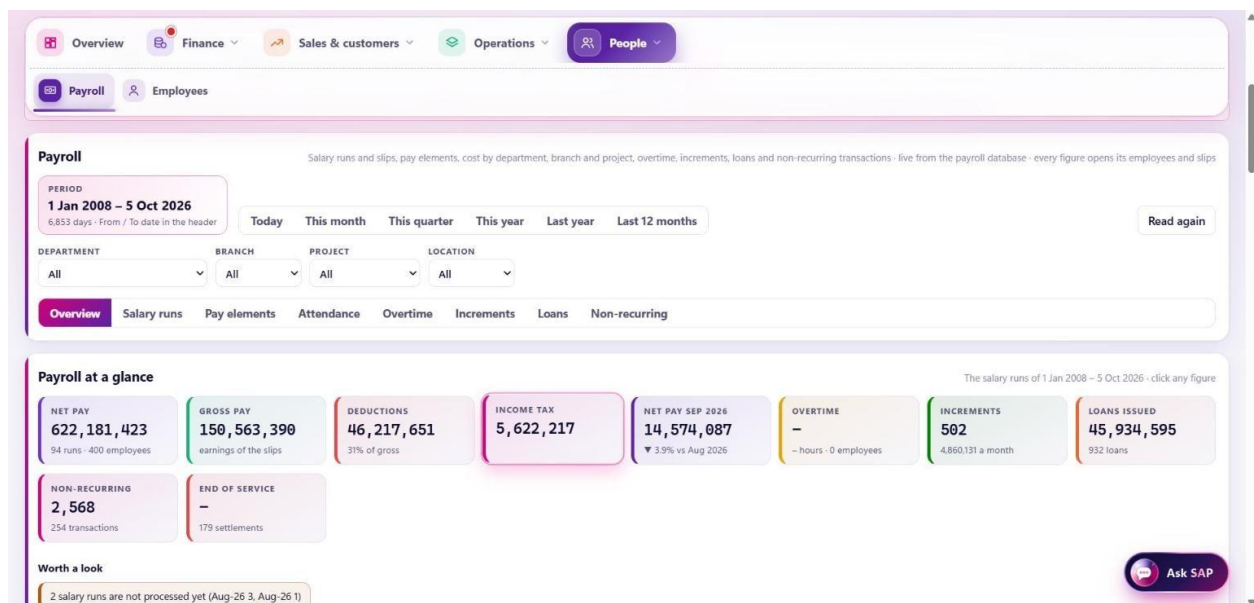


Figure 93. Payroll at a glance

View	What it shows
Overview	Net and gross pay, deductions, income tax, overtime, increments, loans and non-recurring items, net pay by month, earnings, deductions and payroll cost by department, branch, project and more
Salary runs	Every salary run with employees, gross, deductions, tax, net pay and status; click a run for its slips
Pay elements	Earnings and deductions of the slips by month
Attendance, Overtime, Increments	Attendance used by payroll, overtime hours and cost, and salary increments
Loans	Loans issued, outstanding and by month

View	What it shows
Non-recurring	One-off payments and deductions

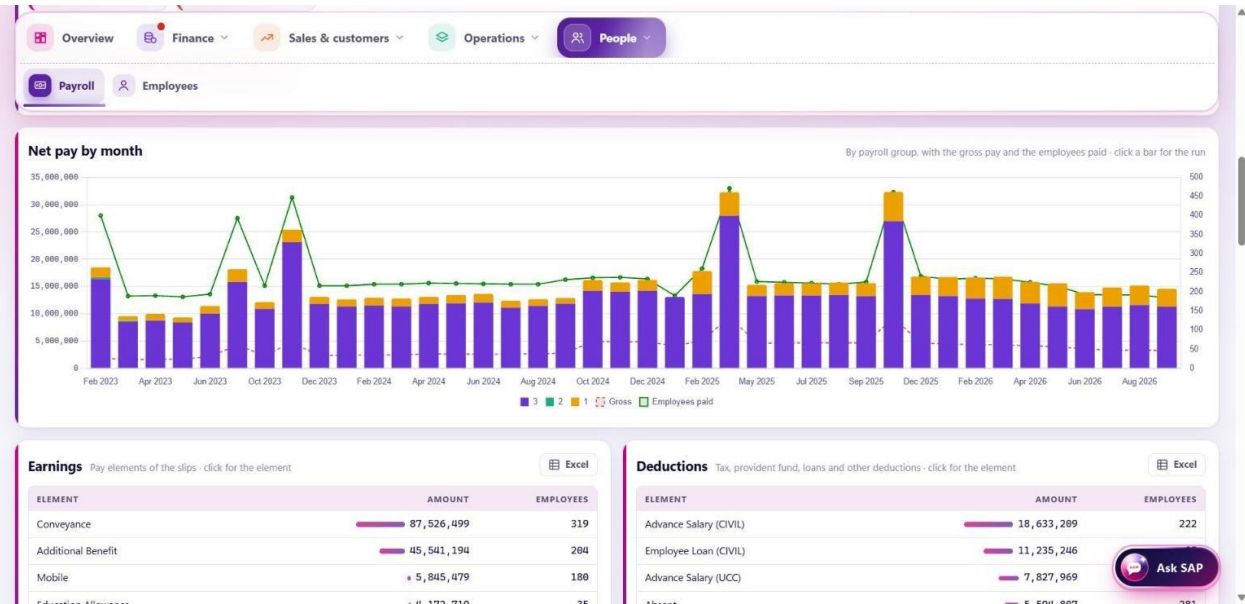


Figure 94. Net pay by month, earnings and deductions

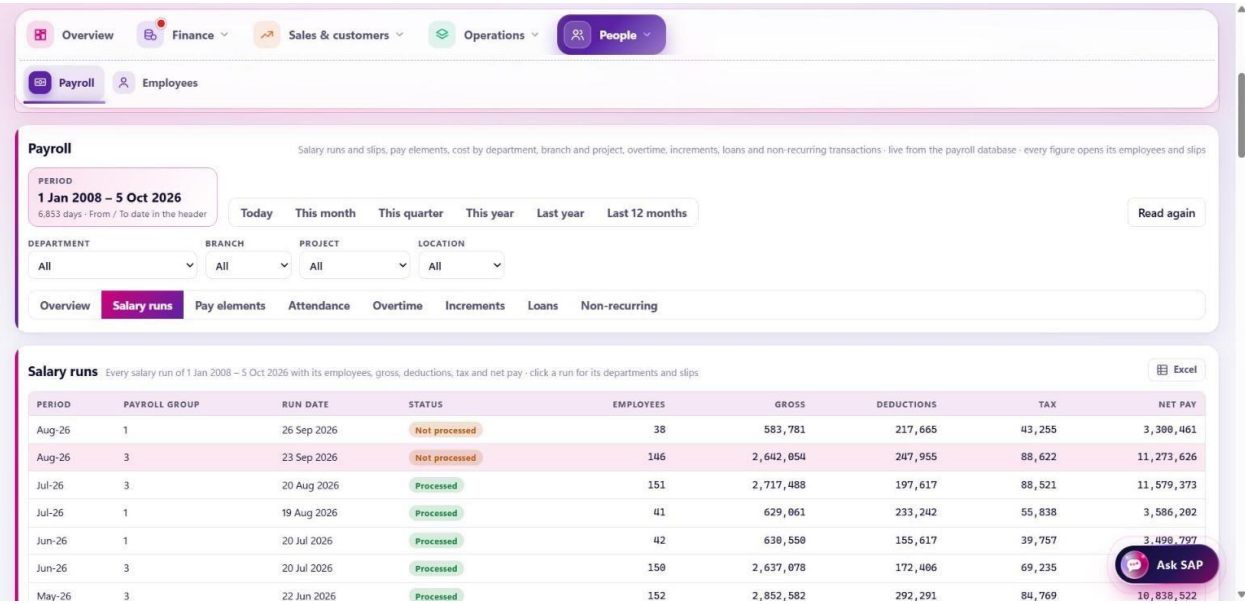


Figure 95. Salary runs

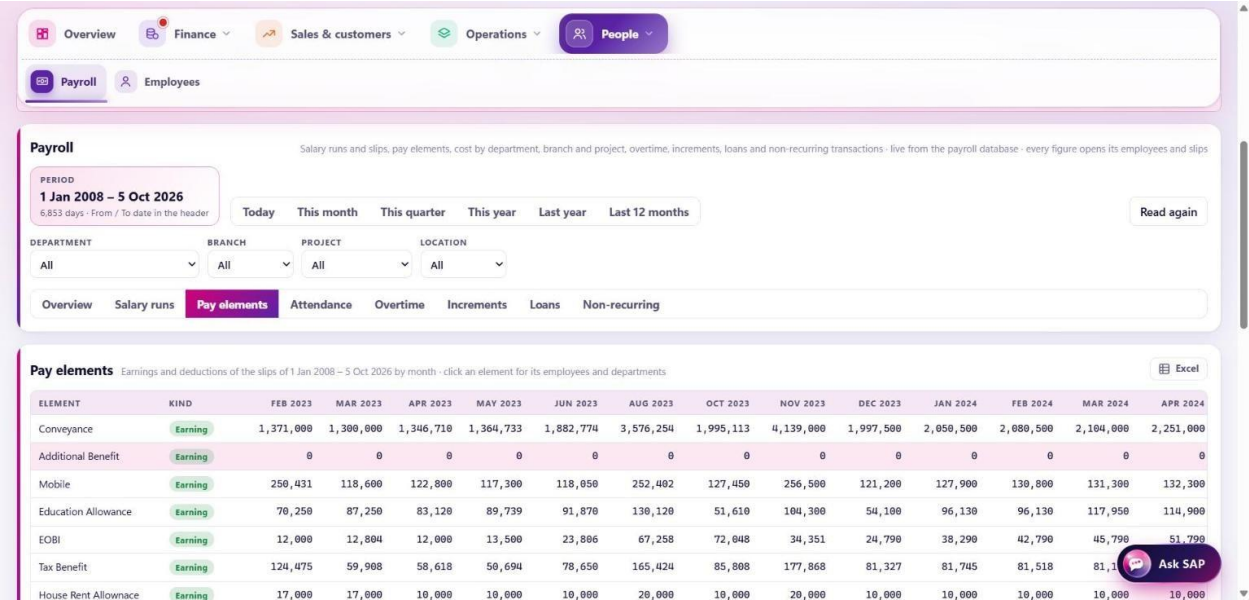


Figure 96. Pay elements

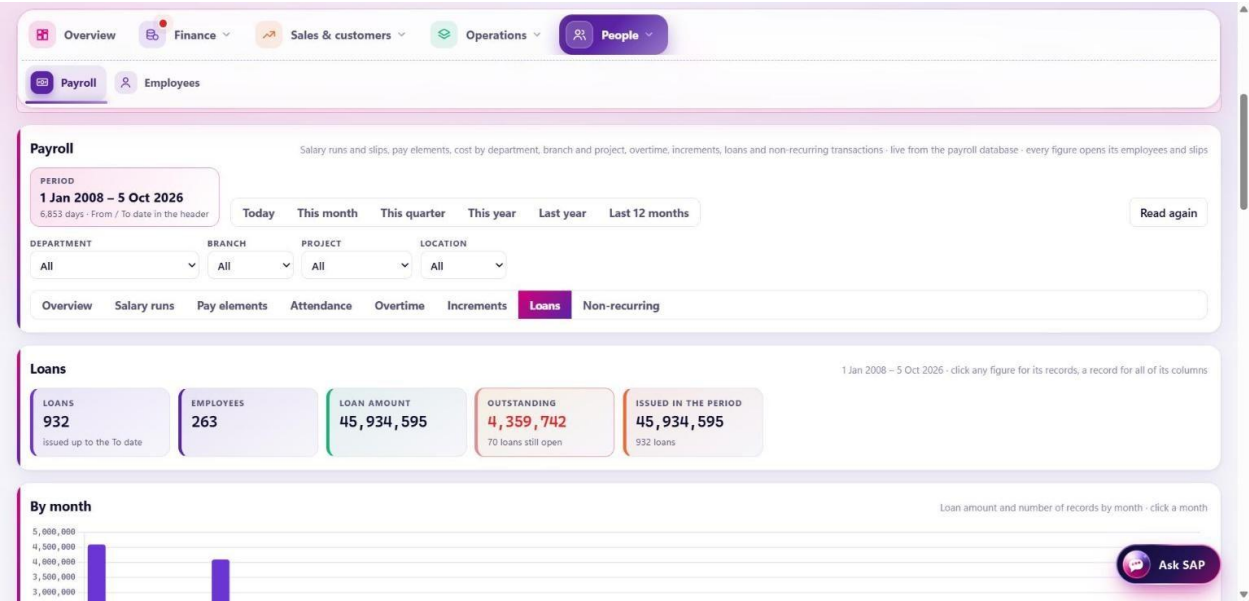


Figure 97. Loans

9. Administration (administrators)

These screens are in the user menu of administrators only.

9.1 Users & access

Add users with **New user**, and for each user set the display name, user name, role (Standard user or Administrator), password (**Generate** creates one), whether the account is active, whether the password must be changed at next sign-in, the tabs, the companies and the export rights. Click **Save changes**.

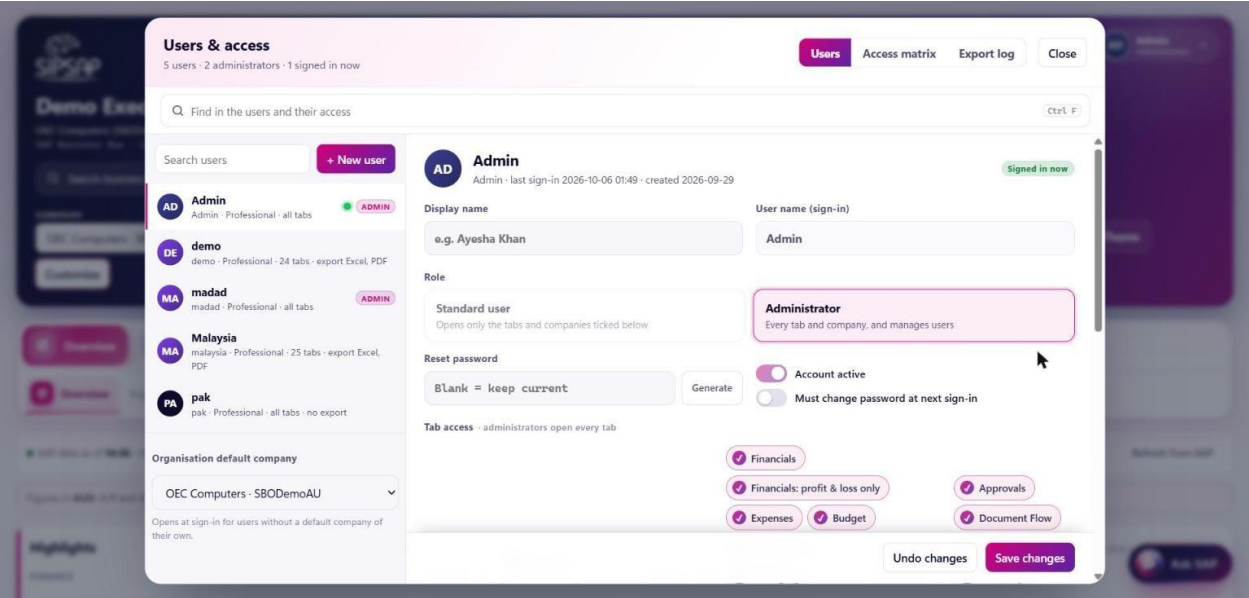


Figure 98. Users & access: one user

The **Access matrix** shows every user against every tab and the Excel export and PDF / print rights; tick a cell to give or remove it. **Export log** lists recent exports. Below the user list you set the **Organisation default company**.

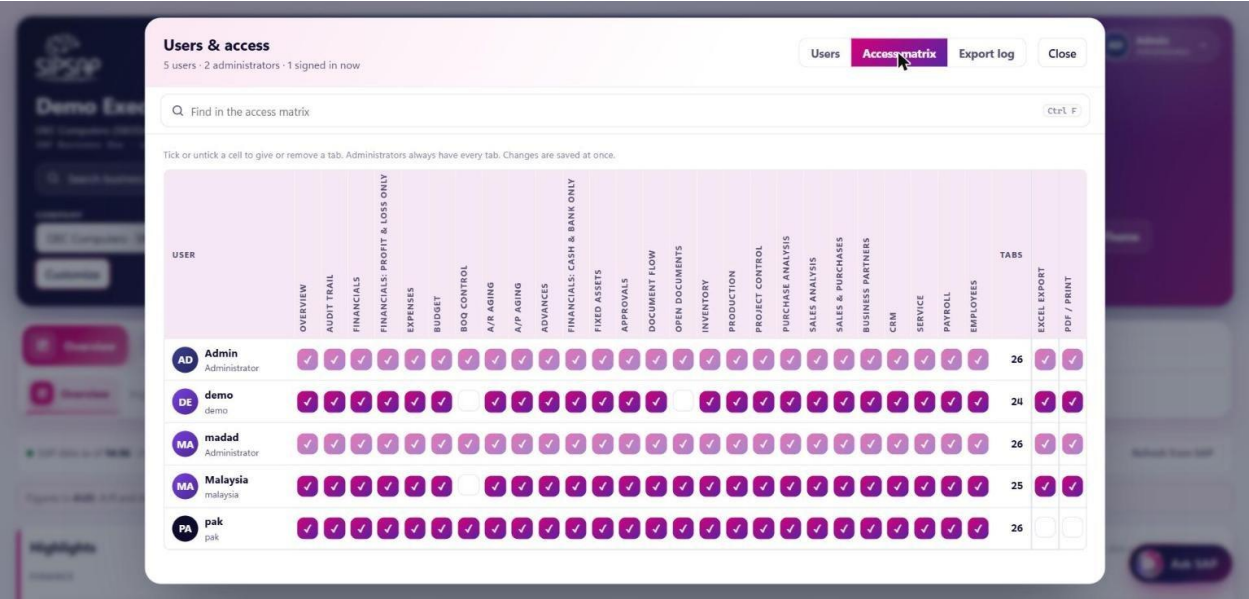


Figure 99. Access matrix

9.2 License administration

Shows the license (kind, number, validity, maintenance), the checks it passed, the named user licenses assigned per type, add-ons and companies. Here you download a license request for SiPSAP and install the license file. The hardware key is blurred in this manual.

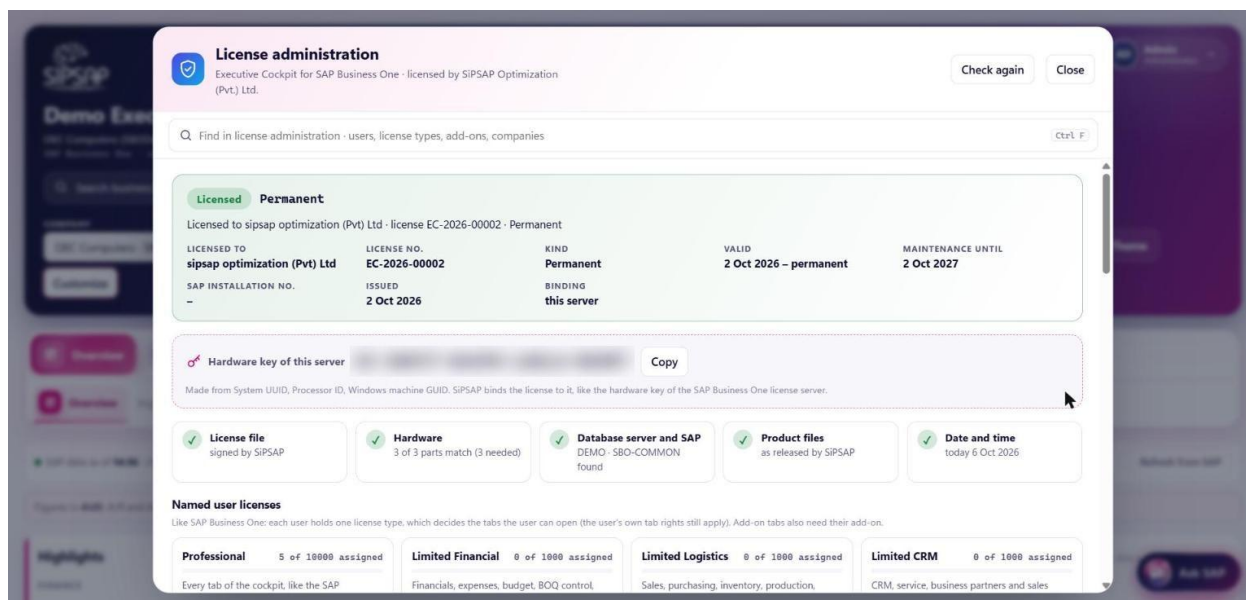


Figure 100. License administration

License type	Tabs it opens
Professional	Every tab
Limited Financial	Overview, Financials, Expenses, Budget, BOQ Control, Open Documents, A/R and A/P Aging, Advances, Fixed Assets, Audit Trail, Business Partners, Sales & Purchases
Limited Logistics	Overview, Sales and Purchase Analysis, Inventory, Production, Project Control, BOQ Control, Open Documents, Document Flow, Approvals, Business Partners, Sales & Purchases
Limited CRM	Overview, CRM, Service, Business Partners, Sales Analysis, Sales & Purchases
Limited HR	Overview, Payroll, Employees
Starter Package	Overview, Financials, Aging, Sales and Purchase Analysis, Inventory, Business Partners, Sales & Purchases (at most 5 users)
Executive Viewer	Overview and Sales & Purchases

9.3 Server configuration

Shows and changes the database connection (Microsoft SQL Server or SAP HANA), the companies the dashboard shows, whether companies added later are read automatically, and the payroll database. **Test connection** must succeed before a change is saved. The web address, port, HTTPS and start with Windows are changed with Executive Cockpit Setup on the server.

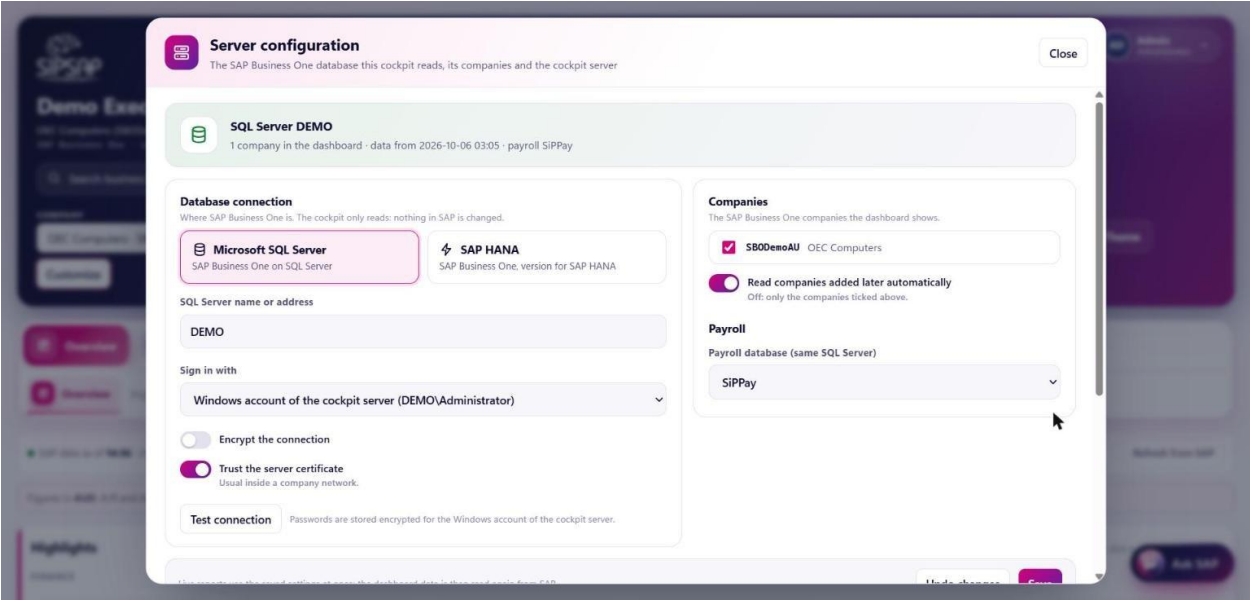


Figure 101. Server configuration

9.4 Data refresh

Shows the result of the last refresh per company and lets you change the schedule: refresh automatically every n minutes, skip companies with no changes, read every company in full at least every n minutes, and how many companies are read at the same time. **Refresh now** reads SAP at once; **Re-read everything** reads every company in full.

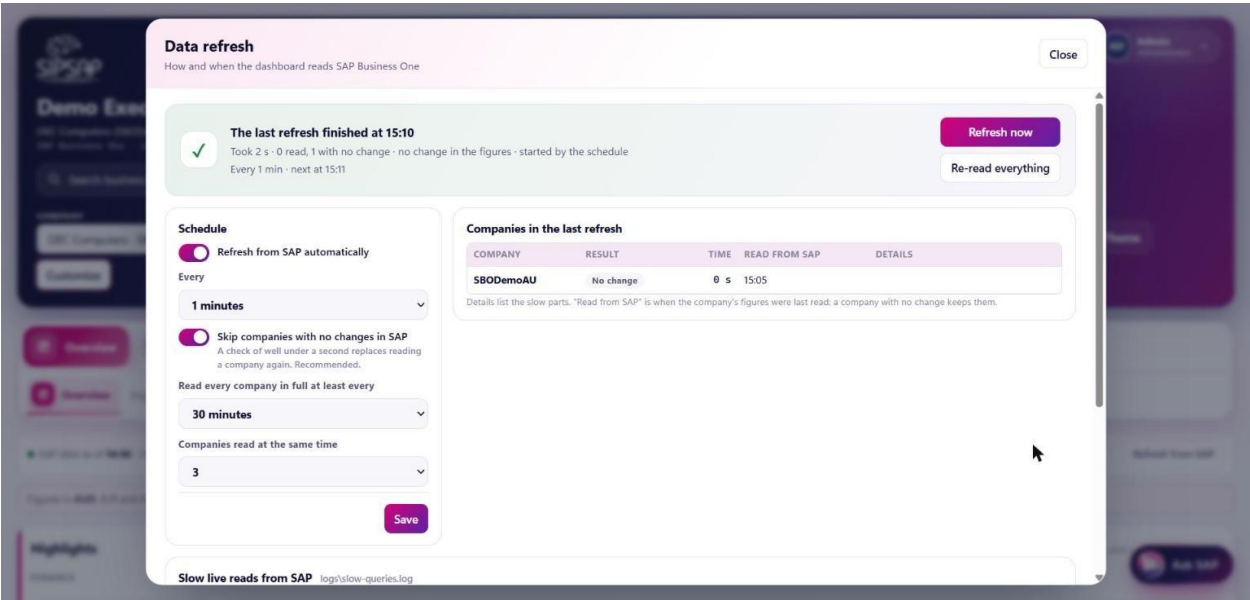


Figure 102. Data refresh

10. Tips and common questions

Question	Answer
A tab I need is missing	Your user or license type does not include it. Ask your administrator to tick it in Users & access
A chart or table is empty	There are no documents in the chosen period. Widen the period in the header or choose "All"
The figures look old	Look at the data status bar. Click Refresh from SAP, or Read again in live tabs
I have no Export button	Your administrator has to give you the Excel export and/or PDF / print right
A tab chip shows a lock	The license type or the add-on does not include that tab
"No license is assigned to your user"	Ask your administrator to assign a license type to you
The browser warns about the certificate	The cockpit uses a certificate made by Setup. Your IT can install it on your computer so the warning stops
Ctrl+F opens the cockpit find box	Press Ctrl+F again for the browser's own find
A PDF attachment shows a blank frame	Use Open in new tab or Download in the attachment viewer
I forgot my password	Ask your administrator to give you a new one

For anything else, contact your cockpit administrator or SiPSAP support at sipsap.us.