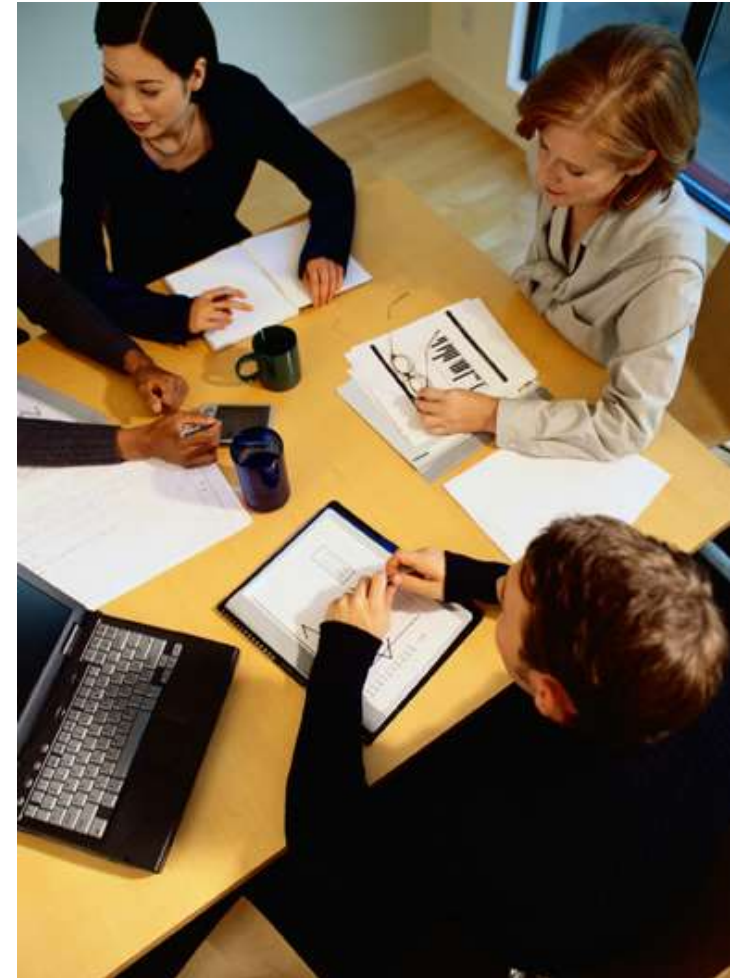


SAP Business One

Queries and Report Writing



Agenda - Topics



1. SAP SQL Queries

2. Crystal Reports

3. Excel Reports

4. Pervasive Analytics

5. Q & A

Date Input

How to recognize tables and fields needed for your queries.

The screenshot shows a 'Sales Order' form with several fields and a table. A pink arrow points from the 'No.' field (value 2589) to the 'Document Number' field code 'ORDR DocNum'. A green arrow points from the 'Qty' field (value 125) to the 'Quantity' field code 'RDR1 Quantity'.

Sales Order

Customer: C20000
Name: Norm Thompson
Anyone: Max Teq
Customer Ref. No.:
Local Currency:

No. Primary: 2589
Status: Open
Posting Date: 12/20/2022
Estimated Delivery Date: 12/21/2022
Document Date: 12/20/2022

Commission type:

Item/Service Type	Item	Summary Type	No Summary			
# Item No.	MFgrs #	Item Description	Qty	Unit Price	Discount %	Tax Code
1	LM4029	LeMon 4029 Printer	125	300.00 \$	0.000	PA
2 Put here additional description of the product being quoted .						

Document Number: 2589 [Form=139 Item=8 Pane=0 Variable=1 ORDR DocNum]

Quantity (Numeric 19.6): 125.000 [Form=139 Item=38 Pane=1 Column=11 Row=1 Variable=1 RDR1 Quantity]

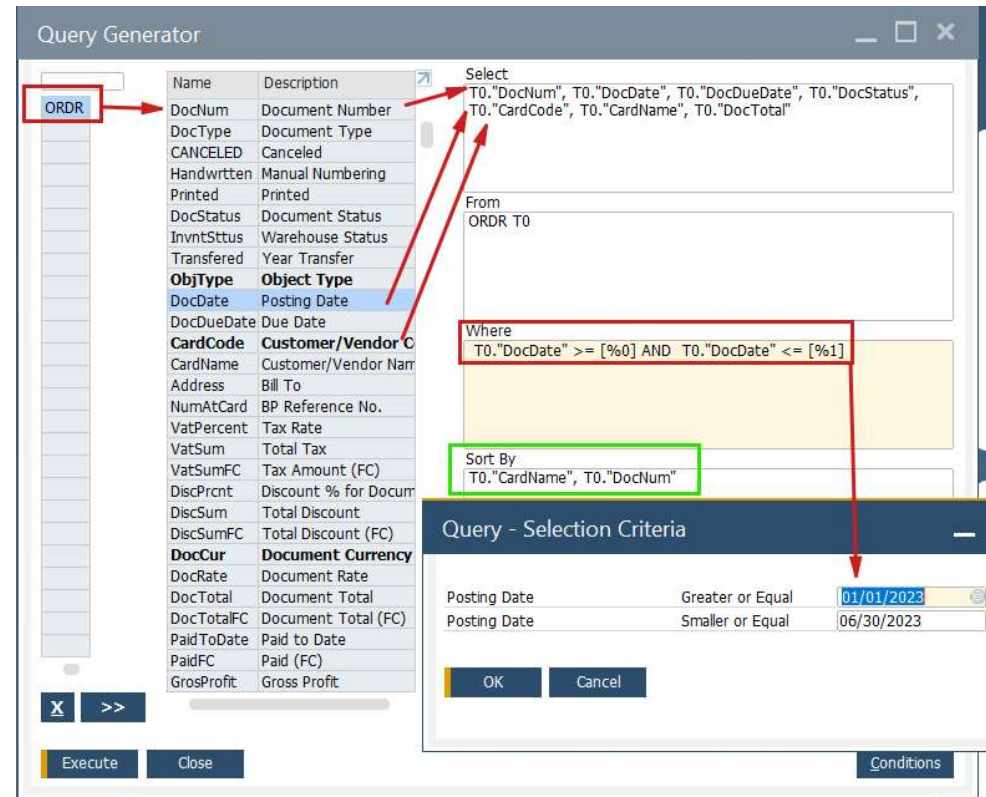
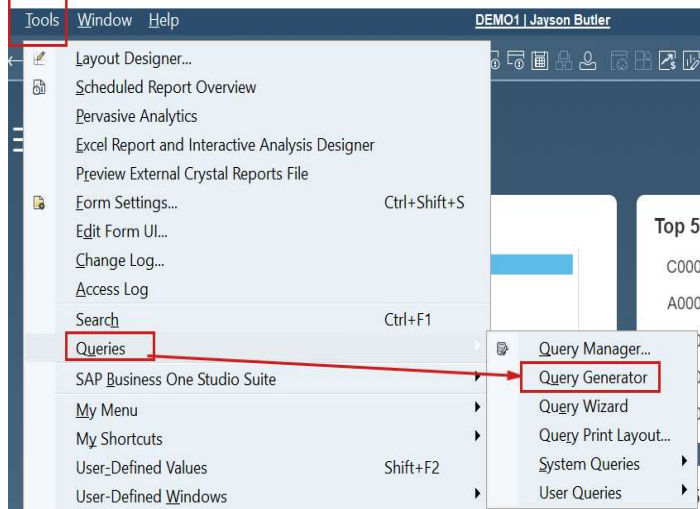
View Data Go To Modules Tools Windo

- User-Defined Fields Ctrl+Shift+U
- System Information Ctrl+Shift+I
- String Information

- Turn the System Information feature on.
- Place your cursor on the field.
- Look at the lower left corner to see the table and field code.

Query Creation

To create a new Query go to: File – Queries – Query Generator



Sample of a simple query with parameters.

Query Samples

List of Sales Orders with the Date Range parameters sorted by Customer Code.

Query Generator

Select
 T0."DocNum", T0."NumAtCard", T0."DocDate",
 T0."DocDueDate", T0."DocStatus", T0."CardCode",
 T0."CardName", T1."LineNum", T1."ItemCode",
 T1."Dscription", T1."Quantity", T1."OpenQty", T1."Price",
 T1."LineTotal", T1."WhsCode", T2."WhsName"

From
 ORDR T0 INNER JOIN RDR1 T1 ON T0."DocEntry" =
 T1."DocEntry" INNER JOIN OWHS T2 ON T1."WhsCode" =
 T2."WhsCode"

Where
 T0."DocDate" >= [%0] AND T0."DocDate" <= [%1]

Sort By
 T0."CardName", T0."DocNum"

Query - Selection Criteria

Field	Operator	Value
Posting Date	Greater or Equal	01/01/2022
Posting Date	Smaller or Equal	01/01/2023

Query Preview

Display Query Structure

#	Documen...	B.	Posting Date	Due Date	D...	Customer/Vend...	Customer/Vendor Name	Row Number	Item No.
1	2581		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central		A00004
2	2581		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central	1	A00004
3	2581		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central	2	A00004
4	2582		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central	4	A00002
5	2582		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central	3	A00002
6	2582		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central	2	A00001
7	2582		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central	1	A00002
8	2582		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central		A00001
9	2583		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central		A00001
10	2583		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central	1	A00002
11	2583		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central	2	A00001
12	2583		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central	3	A00001
13	2583		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central	4	A00001
14	2584		09/12/2022	09/12/2022	O	AMZUSVC	Amazon USA Vendor Central		B10000
15	2586		11/11/2022	11/12/2022	O	1520011	Customer A		02AA0014
16	2586		11/11/2022	11/12/2022	O	1520011	Customer A	1	02AA0008
17	2586		11/11/2022	11/12/2022	O	1520011	Customer A	2	105-0011
18	2579		06/28/2022	07/07/2022	O	C40000	Earthshaker Corporation		MRP_BOM
19	2575		05/19/2022	05/19/2022	C	C0012345	Four Score Coffee Shop		CN-PEANUT
20	2559		01/07/2022	01/07/2022	O	C30000	Microchips		C00001
21	2559		01/07/2022	01/07/2022	O	C30000	Microchips	1	C00002

Query Samples

Sales Analysis per Customer – Summary of Invoices and Credit Memos and Payments.

Simple GROUP BY 2

```

SELECT T0."CardCode", T0."CardName", SUM(T1."DocTotal") "Total Inv Amt",
(SELECT -COALESCE(SUM(T2."DocTotal"),0) FROM ORIN T2 WHERE T0."CardCode" = T2."CardCode") "Total CM Amt",
(SELECT COALESCE(SUM(T1."DocTotal"),0) FROM OINV T1 WHERE T0."CardCode" = T1."CardCode") -
(SELECT COALESCE(SUM(T2."DocTotal"),0) FROM ORIN T2 WHERE T0."CardCode" = T2."CardCode") "Total Amt",
T0."Balance" "Customer Balance",
    
```

#	BP Code	BP Name	Total Inv Amt	Total CM Amt	Total Amt	Customer Balance	Payments Received
1	1520011	Customer A	4,000.00	0.00	4,000.00	4,000.00	0.00
2	AMZUSVC	Amazon USA Vendor Central	416.40	0.00	416.40	416.40	0.00
3	AmzFBAIT	Amazon Seller Account Italy Customer	2,466.34	-782.51	1,683.83	0.00	1,708.83
4	C00000001	Fernando Rapa	27,522.45	0.00	27,522.45	0.00	26,972.00
5	C00000003	Skynet Corporation	520.00	0.00	520.00	0.00	509.60
6	C0012345	Four Score Coffee Shop	12.00	0.00	12.00	12.00	0.00
7	C20000	Norm Thompson	2,642,146.87	-1,537.00	2,640,609.87	1,592,436.14	1,573,606.12
8	C23900	Parameter Technology	1,648,383.88	-1,168.65	1,647,215.23	979,591.86	667,609.54
9	C25000	Star Company	1,336,331.15	0.00	1,336,331.15	909,463.65	308,409.53
10	C26000	River Inc	1,429,222.20	0.00	1,429,222.20	993,364.35	435,849.19
11	C30000	Microchips	1,221,643.86	-16,420.19	1,205,223.67	266,437.26	937,635.56
12	C40000	Earthshaker Corporation	2,263,656.02	-9,810.00	2,253,846.02	962,644.07	1,284,225.94
13	C42000	Mashina Corporation	1,230,313.36	-596.25	1,229,717.11	447,808.02	786,900.75
14	C50000	ADA Technologies	1,333,513.02	0.00	1,333,513.02	959,187.22	372,157.13
15	C500000	Amazon	712.25	-2,681.87	-1,969.62	0.00	239.90
16	C50001	Shopify	0.00	0.00	0.00	0.00	254.80
17	C60000	SG Electronics	1,365,344.33	-1,950.00	1,363,394.33	905,579.31	449,611.59
18	C70000	Aquent Systems	2,036,035.11	-8,286.25	2,027,748.86	1,597,093.10	424,321.54
19	C99999	One Time Customer	641,956.33	0.00	641,956.33	0.00	641,956.33
20	EbayIT	Ebay Seller Account Italy Customer	768.47	-573.68	194.79	-297.48	492.27
21	IC_WEST	IC Customer - West	2.00	0.00	2.00	2.00	0.00
			17,184,966.04	-43,806.40	17,141,159.64	9,617,737.90	7,912,460.62

Execute Cancel Reverse Table Copy Data Save Save As Open

1. Subquery
2. Column Totals are not part of the query

Query Samples

Sample of finding “last” value – subquery with Row_Number over Partition that lists the last date when item was taken out of inventory.

Sample for Last Used
— □ ×

```

SELECT DISTINCT T1."Code", T2."ItemName", T1."Warehouse", T22."OnHand", T22."OnHand"*T22."AvgPrice" "Total Value",
(SELECT TL."DocDate" FROM
(SELECT T0."ItemCode", T0."OutQty", T0."DocDate", ROW_NUMBER() OVER (PARTITION BY T0."ItemCode" ORDER BY T0."DocDate"
DESC) AS Row_num FROM OINM T0 WHERE T0."InQty" = 0 and T0."OutQty" <> 0 ORDER BY T0."ItemCode", T0."DocDate" DESC) TL
WHERE TL."ROW_NUM" = 1 AND TL."ItemCode" = T1."Code") "Last Used",
            
```

#	Code	Item Description	Warehouse	In Stock	Total Value	Last Used	Group ...
1	02AA0008	Pressure Roller with Spring	01	151,223.000	17,233,373.08	09/12/2021	Items
2	02AA0009	Mag Roller with Spring	01	20.000	1,980.00	09/30/2021	Items
3	02AA0013	"BOR - LABOR-Assy., Large Pulley"	01	1.000	0.00		Items
4	02AA0014	Assy., Standard Bezel	01	17.000	8,000.03	09/04/2020	Items
5	02AA3005	"Anti-String, Non-Lockable, 500 Note Universal Plastic Cash Box"	01	4.000	20.00	01/26/2023	Items
6	02AA7001	"Apex 7000, Assembly, Bottom Sensor Plate, Stackered 12VDC, No Mag"	01	40,030.000	2,001.50	09/22/2021	Items
7	04AA0034	Apex 7000 microboard complete, less plastic	01	0.000	0.00		Items
8	04AA0034LP	Apex 7000 microboard complete, less plastic	01	9.000	45.00	02/15/2022	Items
9	05AA0001	"Apex Micro to Upper Sensor Harness, For 12V Stackered or Stackerless"	01	37,735.000	10,414,860.00		Items
10	105-0004	MOUNT, ENCODER	01	4.000	149.68	08/25/2021	Items
11	105-0011	FEEDBACK LOWER HOUSING	01	4.000	374.16	08/25/2021	Items
12	105-0012	FEEDBACK UPPER HOUSING	01	4.000	374.16	08/25/2021	Items
13	105-0013	CYLINDER MOUNT	01	5.000	62.95	08/25/2021	Items
14	10AA0003	"Security Plate, Purchased Sheet Metal Part"	01	4.000	3.48	01/26/2023	Items
15	10AA0013	Anti-String Cash Box Insert	01	5.000	1.25		Items
16	20AA0003	Motor Mount Shaft	01	7.000	2,100.00	08/05/2021	Items
17	300-2002	SLEEVE	01	4.000	34.88	08/25/2021	Items
18	303-5001	FEEDBACK SHAFT	01	4.000	1,000.00	08/25/2021	Items
19	30AA0014	"Front Bezel, Tool 5"	01	3.000	2.85	08/24/2020	Items
20	30AA0018	"Front Window, Tool 1, 1 per"	01	3.000	0.42	08/24/2020	Items

Execute
Cancel
Reverse Table
Copy Data
Save
Save As
Open

Queries with UNION Statement

AR Invoices and Credit Memos - UNION

```
SELECT T0."DocEntry" "InvDrill", 'INV' "Doc Type", T0."DocNum", T0."DocStatus", T0."CANCELED", T0."Ca
T1."StreetB" "BillTo Street", T1."CityB" "BillTo City", T1."StateB" "BillTo State", T1."ZipCodeB" "BillTo ZIP
T0."Address2", T1."StreetS" "ShipTo Street", T1."CityS" "ShipTo City", T1."StateS" "ShipTo State", T1."
T2."ActDelDate" "Delivery Date", T0."DocDate", T0."CreateDate", T3."PymntGroup",
CASE WHEN T0."CANCELED" = 'C' THEN -T2."Quantity" ELSE T2."Quantity" END "Cases",
CASE WHEN T0."CANCELED" = 'C' THEN -T2."InvQty" ELSE T2."InvQty" END "Eaches",
T2."ItemCode" "Item", T2."Dscription" "Description",
CASE WHEN T0."CANCELED" = 'C' THEN -T2."LineTotal" ELSE T2."LineTotal" END "Amount",
T4."Segment_0" || '-' || T4."Segment_1" "G/L Account"
FROM OINV T0
INNER JOIN INV12 T1 ON T0."DocEntry" = T1."DocEntry"
INNER JOIN INV1 T2 ON T0."DocEntry" = T2."DocEntry"
INNER JOIN OCTG T3 ON T0."GroupNum" = T3."GroupNum"
INNER JOIN OACT T4 ON T2."AcctCode" = T4."AcctCode"
WHERE T0."DocDate" >= [%0] and T0."DocDate" <= [%1] AND T4."Segment_0" like '41%%'
```

UNION ALL

```
SELECT T0."DocEntry" "Drill", 'CM' "Doc Type", T0."DocNum", T0."DocStatus", T0."CANCELED", T0."Ca
T1."StreetB" "BillTo Street", T1."CityB" "BillTo City", T1."StateB" "BillTo State", T1."ZipCodeB" "BillTo ZIP
T0."Address2", T1."StreetS" "ShipTo Street", T1."CityS" "ShipTo City", T1."StateS" "ShipTo State", T1."
T2."ActDelDate" "Delivery Date", T0."DocDate", T0."CreateDate", T3."PymntGroup",
CASE WHEN T0."CANCELED" = 'C' THEN T2."Quantity" ELSE -T2."Quantity" END "Cases",
CASE WHEN T0."CANCELED" = 'C' THEN T2."InvQty" ELSE -T2."InvQty" END "Eaches",
T2."ItemCode" "Item", T2."Dscription" "Description",
CASE WHEN T0."CANCELED" = 'C' THEN T2."LineTotal" ELSE -T2."LineTotal" END "Amount",
T4."Segment_0" || '-' || T4."Segment_1" "G/L Account"
FROM ORIN T0
INNER JOIN RIN12 T1 ON T0."DocEntry" = T1."DocEntry"
INNER JOIN RIN1 T2 ON T0."DocEntry" = T2."DocEntry"
INNER JOIN OCTG T3 ON T0."GroupNum" = T3."GroupNum"
INNER JOIN OACT T4 ON T2."AcctCode" = T4."AcctCode"
WHERE T0."DocDate" >= [%0] and T0."DocDate" <= [%1] AND T4."Segment_0" like '41%%'
```

```
ORDER BY T0."DocDate", "Customer Code", T0."DocNum"
```

- The UNION operator is used to combine the result of multiple SELECT statements;
- Every SELECT statement must have the same number of columns;
- Columns must have similar types of data;
- Columns must be in the same order;
- **NOTE: Remember to flip the sign while listing "opposite" document values.**

```
SELECT 'INV' "Type", T0."DocNum", T0."DocStatus",
T0."CardCode", T0."CardName", T0."DocDate", T0."DocTotal"
FROM OINV T0
UNION ALL
SELECT 'CM' "Type", T0."DocNum", T0."DocStatus",
T0."CardCode", T0."CardName", T0."DocDate", -T0."DocTotal"
FROM ORIN T0
ORDER BY T0."CardCode"
```

Item and Table Syntax used in Formatted Searches

The most common syntax used for FMS queries: `[$(<ItemUID>.<ColumnUID>.<DataType>)]`

The screenshot shows a 'Sales Order' window. Red circles are placed over the following elements:

- 1. Document Number: 2589
- 2. Posting Date: 12/20/2022
- 3. Quantity: 125
- 4. Total: 29,817.47 \$
- 5. Discount: 25.000 %
- 6. Item Description: LeMon 4029 Printer

1. Integer values (Document Number)
`[$(8.0.NUMBER)]`
2. Dates (Posting Date)
`[$(10.0.DATE)]`
3. Data on line level (Quantity)
`[$(38.11.NUMBER)]`
4. Decimal & currency codes (Doc Total)
`[$(38.17.CURRENCY)]`
5. Decimal values (Discount)
`[$(24.0.NUMBER)]`
6. String values (Item Description)
`[$(38.3.STRING)]`

Example – Default Expense Account on AP Invoice.

1	Document Number 2589 [Form=139 Item=8 Pane=0 Variable=1 ORDR,DocNum]	2	Posting Date (Date) 12/20/2022 [Form=139 Item=10 Pane=0 Variable=1 ORDR,DocDate]
3	Quantity (Numeric 19.6) 125.000 [Form=139 Item=38 Pane=1 Column=11 Row=1 Variable=11 RDR1,Quantity]	4	(40 Characters) 29,817.47 \$ [Form=139 Item=29 Pane=0 Variable=91]
5	Discount % for Document (Numeric 19.6) 25.000 [Form=139 Item=24 Pane=0 Variable=1 ORDR,DiscPrct]	6	Item/Service Description (200 Characters) LeMon 4029 Printer [Form=139 Item=38 Pane=1 Column=3 Row=1 Variable=11 RDR1,Description]

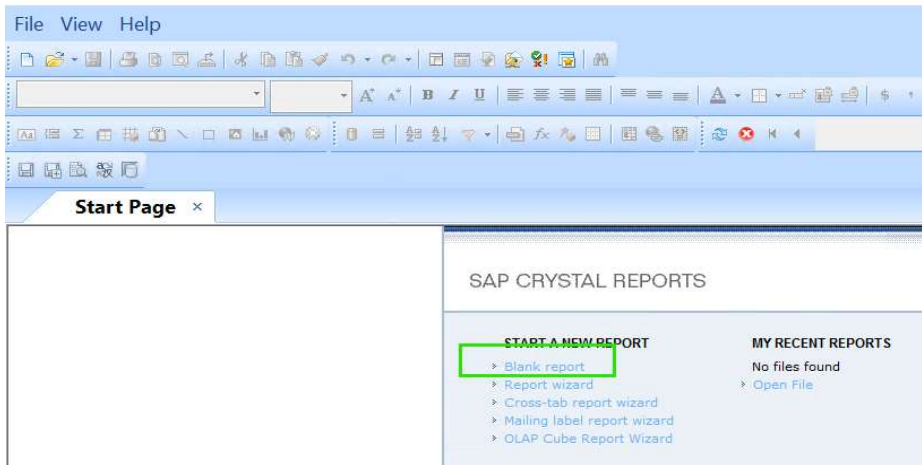
Crystal Reports

The main report writing tool in SAP is Crystal Reports (CR).

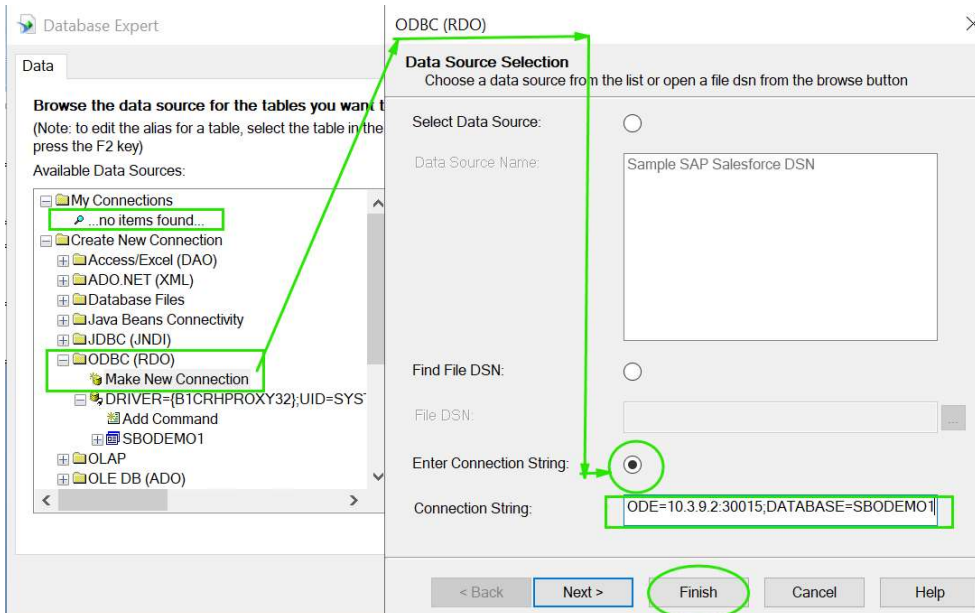
- CR can be used to create/print document layouts and analytical reports;
- CR reports can be run outside of SAP or imported to SAP and printed or emailed directly from there;
- CR reports can vary from simple list / tabular data to very complex analytical output that includes grouping, summary, sub-reports, charts;
- During our webinar we will create a simple report and learn how to modify an existing layout and re-import it to SAP; and
- CR must be installed separately and needs to be connected to the SAP database.

Login and Connection to Database

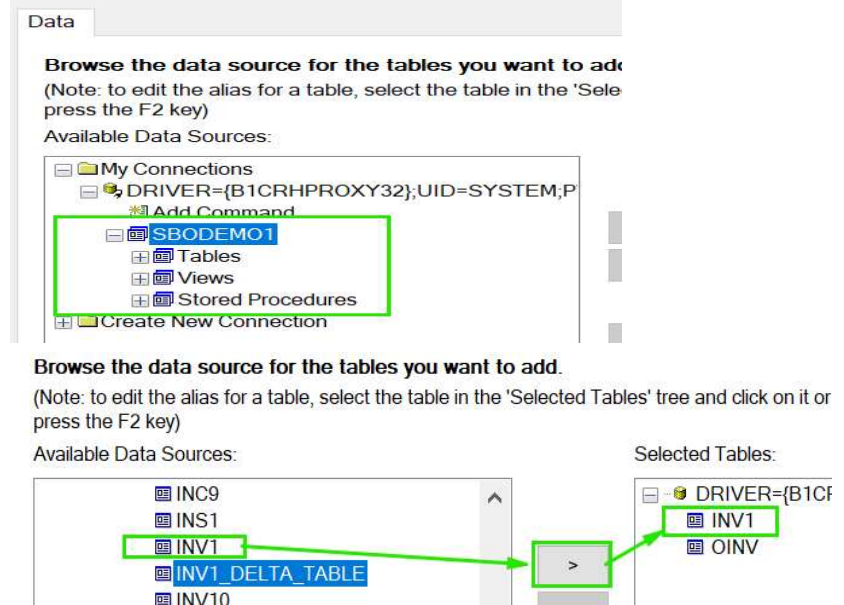
SAP Crystal Reports - [Start Page]



- Start a blank report;
- Create new connection using report driver, sample below:
 - **DRIVER={B1CRHPROXY32};UID=SYSTEM;PWD=Password22;SERVERNODE=10.3.9.2:30015;DATABASE=SBODEMO1**
- Select required objects (tables, views or stored procedures) and link them.



Database Expert



Report Structure

1. Report parameters and fields formatting;
2. Data grouping (2-level grouping by document and by customer);
3. Summary of fields can be done on all or selected groups and the whole report; and
4. Print Date and Page Number as a sample of Special Fields predefined by CR.

Section	Fields
Report Header	Detail Sales per Customer {?FromDate} - {?ToDate} (1) Print Date (4) Page Number (4)
Page Header	DocNum, DocDate, ItemCode, Description, Quantity, LineTotal
Group Header #1a	Customer: Group #1: {CardName} (2)
Group Header #1b	
Group Header #2	DocNum, DocDate
Details	ItemCode, Description, Quantity, LineTotal
Group Footer #2	Total for Invoice # {DocNum}, V1.LineTotal (3)
Group Footer #1	Total for Customer {CardName}, V1.LineTotal
Report Footer	REPORT TOTAL, V1.LineTotal
Page Footer	

Sample of Report Output

Detail Sales per Customer

11/21/2023

1/1/20 - 11/11/23

1

Customer: AMZUSVC Amazon USA Vendor Central

<u>DocNum</u>	<u>DocDate</u>	<u>ItemCode</u>	<u>Dscription</u>	<u>Quantity</u>	<u>LineTotal</u>
1707	05/26/2021	02AA0010	Rear Pressure Roller W/Spring	1.00	14.40
		02AA0009	Mag Roller with Spring	1.00	14.40
		02AA0008	Pressure Roller with Spring	1.00	14.40
		02AA0002	"Assembly, Punch Mechanism, Fully	1.00	36.60
		02AA0001	"Assembly Drive Motor Mount, Motor	11.00	336.60
Total for Invoice # 1707					416.40
Total for Customer Amazon USA Vendor Central					416.40

Customer: AmzFBAIT Amazon Seller Account Italy Customer

<u>DocNum</u>	<u>DocDate</u>	<u>ItemCode</u>	<u>Dscription</u>	<u>Quantity</u>	<u>LineTotal</u>
1693	09/20/2021	6943757600069	6943757600069	1.00	107.71
Total for Invoice # 1693					107.71

Report and Layout Manager

Report and Layout Manager is used to import Crystal Reports and document layouts into SAP to run them directly from there.

Steps to open directly from the document form:

1. Click on pencil icon;
2. Select layout;
3. Click on Manage Layout button;
4. Highlight the layout; and
5. Click on Edit button.

OR

Follow the path:

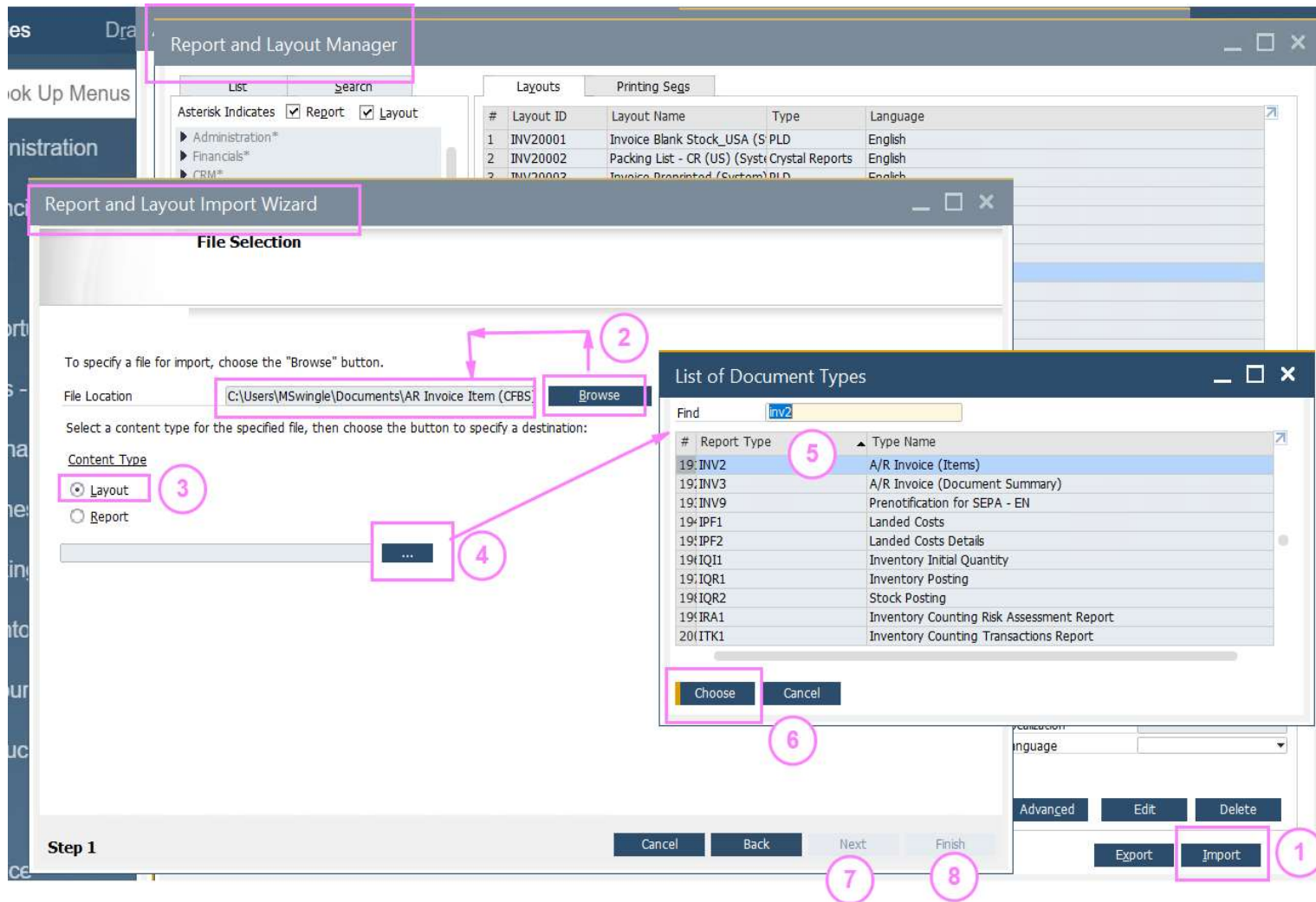
Administration → Setup → General
→ Report and Layout Manager

The screenshot shows the SAP Report and Layout Manager interface. The main window is titled 'Report and Layout Manager' and contains a table of layouts. The table has columns for Layout ID, Layout Name, Type, and Language. The layout 'INV20008' is highlighted in blue. To the right of the table is a 'Printing Segs' section. Below the table is a form for editing the selected layout, with fields for ID, Name, Description, Layout Type, Last Updated, Author, Status, B1 Version, Crystal Reports, Printer, 1st Page Printer, No. of Copies, Localization, and Language. At the bottom right of the form are buttons for 'Set as Default', 'Edit', and 'Delete'. The 'Edit' button is highlighted with a pink box and a circled '5'. Other callouts include: '1' on the pencil icon in the top toolbar; '2' on the 'Layout and Sequence' window title; '3' on the 'Manage Layout' button; and '4' on the highlighted row in the table.

#	Layout ID	Layout Name	Type	Language
1	INV20001	Invoice Blank Stock_USA (S	PLD	English
2	INV20002	Packing List - CR (US) (Syst	Crystal Reports	English
3	INV20003	Invoice Preprinted (System)	PLD	English
4	INV20004	A/R Invoice (Item) - CR (US)	Crystal Reports	English
5	INV20005	Invoice with Advice (EHP) (:	PLD	English
6	INV20006	AR Invoice	Crystal Reports	
7	INV20007	Invoice (EHP) (System)	PLD	English
8	INV20008	AR Invoice Item (CFBS)	Crystal Reports	
9	INV20009	Invoice Including Batch/SN (PLD	English

ID	Name	Description
INV20008	AR Invoice Item (CFBS)	

Import the Report



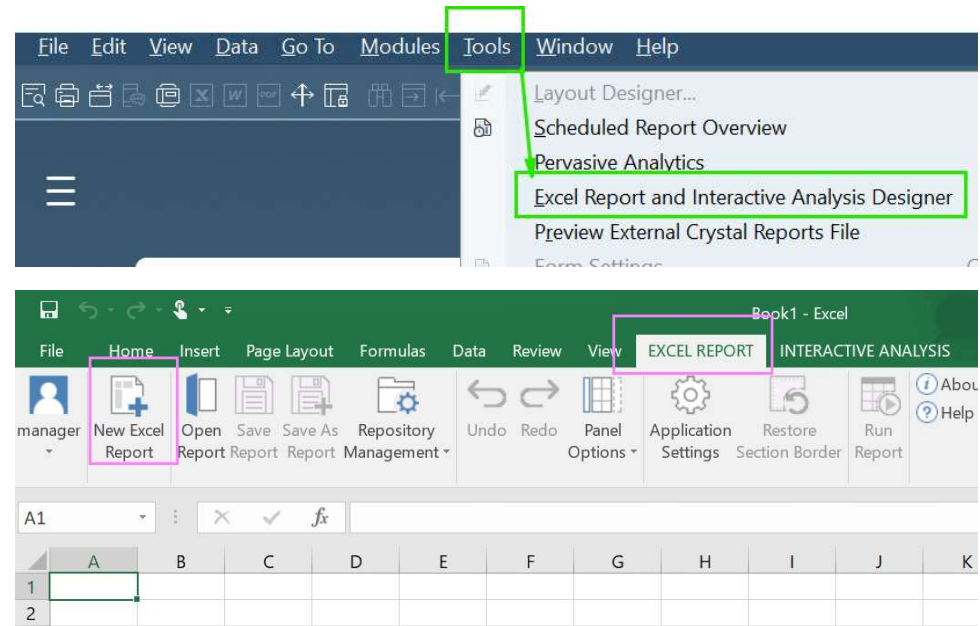
Starting from Report and Layout Manager:

1. Click Import button to open wizard;
2. Click on Browse and select file;
3. Select layout option;
4. Find proper document type;
5. Click Choose;
6. Click Next; and
7. Click Finish.

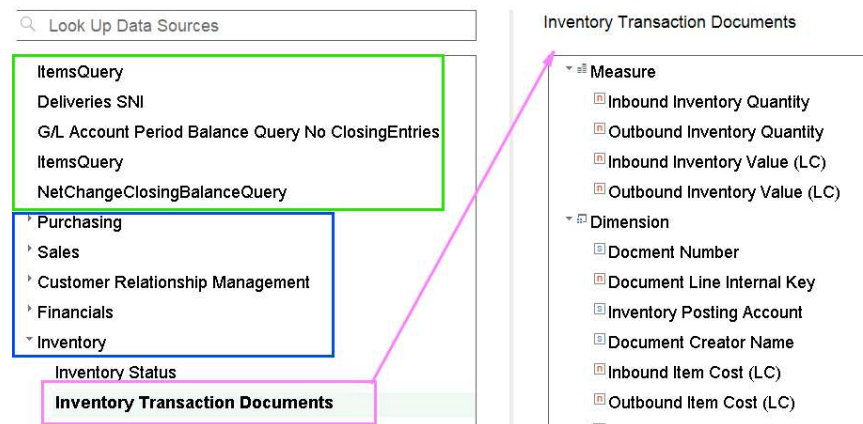
Excel Report and Interactive Analysis Designer

To start the designer, follow the below steps:

- After a new Excel spreadsheet opens select Excel Report option and click on New Excel Report; and
- Select your data source from predefined system calculation (marked in blue) or custom created views (samples in green).



Select Data Source

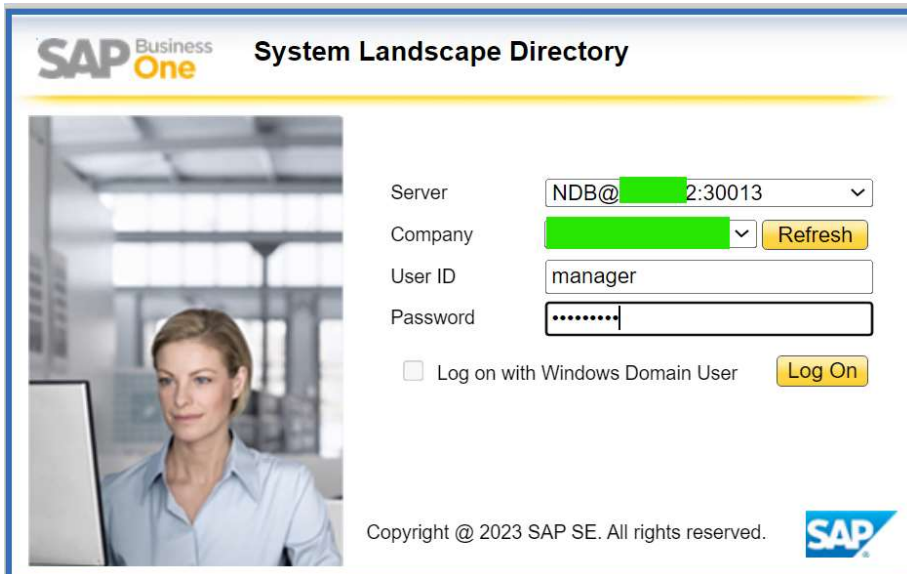


How to Create & Access MS Excel Reports

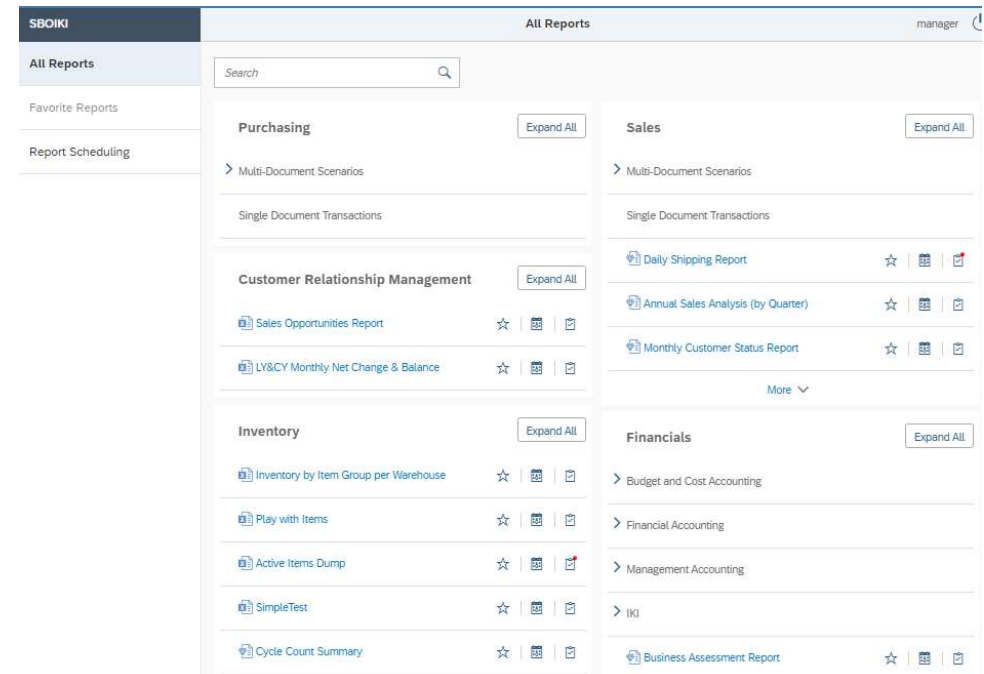
Analytics Portal – Report Scheduling

The Analytics Portal for SAP Business One, version for SAP HANA enables you to run your Crystal Reports and Excel Reports in real time through a web browser on your computer, tablet, or mobile device. With this portal, you can also schedule automatic report running and view report running history. It makes Crystal Reports and Excel Reports more accessible for the ones who have not installed the SAP Business One client application or Microsoft Excel on their computer.

All the users who have the authorization of analytical features in SAP Business One, version for SAP HANA can access the Analytics Portal via SAML authentication.



The screenshot shows the SAP Business One System Landscape Directory login interface. It features a header with the SAP Business One logo and the title 'System Landscape Directory'. Below the header is a large image of a woman working at a computer. To the right of the image are input fields for 'Server' (NDB@[redacted]2:30013), 'Company' ([redacted]), 'User ID' (manager), and 'Password' (masked with dots). There is a 'Refresh' button next to the company field and a 'Log On' button at the bottom right. A checkbox for 'Log on with Windows Domain User' is also present. The footer contains the copyright notice 'Copyright @ 2023 SAP SE. All rights reserved.' and the SAP logo.



The screenshot displays the 'All Reports' page in the SAP Business One Analytics Portal. The page is organized into a grid of report categories. On the left, there is a sidebar with 'All Reports', 'Favorite Reports', and 'Report Scheduling'. The main content area is divided into sections: 'Purchasing', 'Customer Relationship Management', 'Inventory', 'Sales', and 'Financials'. Each section contains a list of reports with icons, titles, and action buttons like 'Expand All', 'Star', and 'Refresh'. For example, under 'Purchasing', there are 'Multi-Document Scenarios' and 'Single Document Transactions'. Under 'Customer Relationship Management', there are 'Sales Opportunities Report', 'LY&CY Monthly Net Change & Balance', and 'Inventory'. Under 'Sales', there are 'Daily Shipping Report', 'Annual Sales Analysis (by Quarter)', and 'Monthly Customer Status Report'. Under 'Financials', there are 'Budget and Cost Accounting', 'Financial Accounting', 'Management Accounting', and 'IKI'. The user's name 'manager' is visible in the top right corner.

SAP B1 Analytics Portal

Scheduling and History

Scheduled Task	Report Name	Category	Type	Creation Time	Action
Active Items Dump - Weekly	Active Items Dump	Inventory	Excel	2023-10-25 18:25:29	
Active Items Only - Dump	Active Items Dump	Inventory	Excel	2023-08-09 18:01:11	
Late Order Report	Late Order Report	Sales	Crystal	2023-01-13 08:29:10	
IKI Scheduled Shipments	IKI Scheduled Shipments	Sales	Crystal	2022-04-28 19:13:08	
Daily Shipping Report	Daily Shipping Report	Sales	Crystal	2022-02-24 10:59:03	
Inventory Insurance	InsuranceInventory_KL	Inventory	Crystal	2021-10-12 17:15:23	

You can select any Crystal Report and Excel Report available from SAP modules and see a list of all scheduled reports.

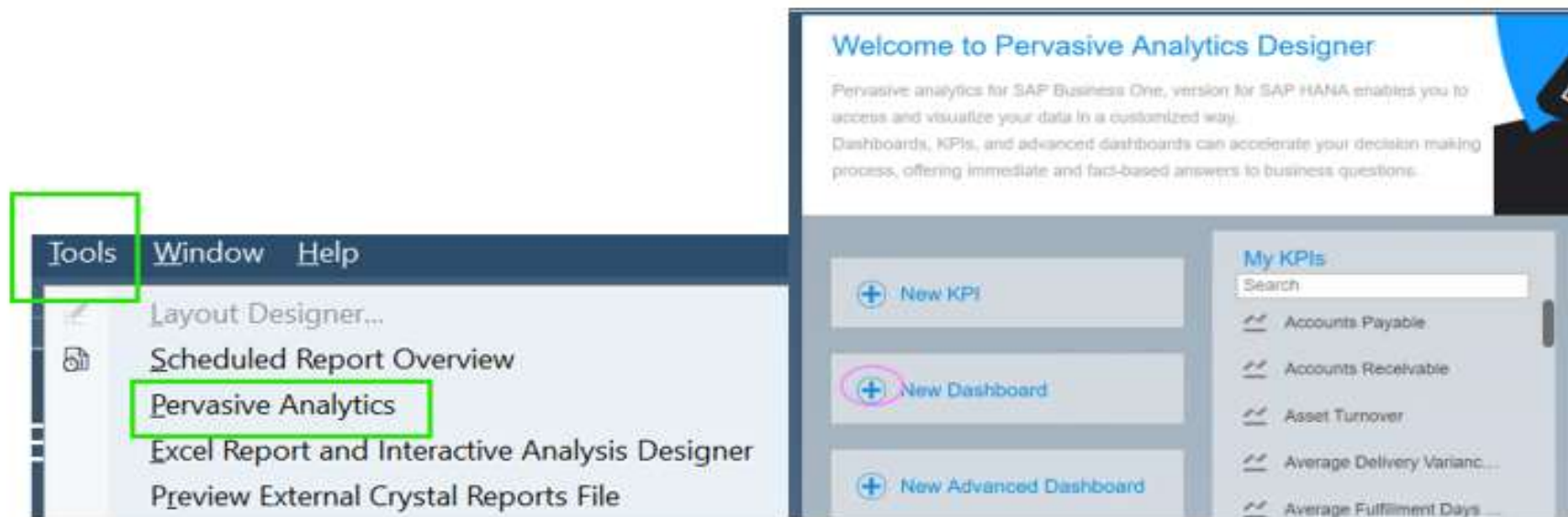
You can select what type of output should be used and set the frequency and the recipients.

You can also see the history of when the reports were run and if it was successful.

Report Name	Scheduled Task	Type	Run Time	Status	Parameter	Remarks	Action
Late Order Report	Late Order Report	Crystal	2023-11-26 1...	Success		Sent report fil...	
Late Order Report	Late Order Report	Crystal	2023-11-25 1...	Success		Sent report fil...	
Late Order Report	Late Order Report	Crystal	2023-11-24 1...	Success		Sent report fil...	
Late Order Report	Late Order Report	Crystal	2023-11-23 1...	Success		Sent report fil...	
Late Order Report	Late Order Report	Crystal	2023-11-22 1...	Success		Sent report fil...	

Pervasive Analytics - Simple Dashboard Designer

- Pervasive Analytics for HANA allows users to create their own KPIs, Dashboards, and Advanced Dashboards.
- All these types of reporting can be based on predefined calculation views that come with SAP or based on custom queries or custom calculation views.



SAP B1 Dashboards & Advanced Dashboards Demo

Sample Dashboard Designer

Sample of custom dashboard created based on custom query.

User selects the query (or calculation views from the available Data Sources) and drags the fields: measures and dimensions to the Target Fields.

User can select different types of Charts and save the dashboard and then add it to his/her cockpit.

Select Base Data Source

Search

▼ User-Defined Query

- ▶ System
- ▶ General
- ▶ CFBS
- ▼ Webinar
 - Sales Orders List
 - Simple GROUP BY
 - Simple GROUP BY 2
 - Find Base SO Number for Invoice Lin...
 - Sample for Last Used
 - AR Invoices and Credit Memos - UNIO...
- ▼ Calculation View
 - ▶ Administration
 - ▶ Purchasing

Basic Settings

Measures

- Total Inv Amt
- Total CM Amt
- Total Amt
- Customer Balance
- Payments Received
- Count

Dimensions

- CardCode
- CardName

Filter and Parameter

Target Measures

- SUM(Total Inv Amt)
- SUM(Total CM Amt)
- SUM(Payments R...)

Target Dimensions

- CardCode
- CardName

Chart Type: Line Chart

Strategy Type: None

SUM (Total Inv Amt)

SUM (Total CM Amt)

SUM (Payments Received)

Customer	SUM (Total Inv Amt)	SUM (Total CM Amt)	SUM (Payments Received)
Customer A	0	0	0
Vendor Central	0	0	0
Italy Customer	0	0	0
ernando Rapa	0	0	0
et Corporation	0	0	0
e Coffee Shop	0	0	0
rm Thompson	2.6M	0	1.6M
er Technology	1.6M	0	0.6M
Star Company	1.3M	0	0.3M
River Inc	1.4M	0	0.4M

Questions?

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