



Basic Functional Training

Course Guide

2008



www.openbravo.com



I.Course Summary

This is a 5 days Basic Functional Training for partners, potential partners and advanced users to start **using Openbravo ERP, configuring its master data and doing basic customizing.**

The last day of the course, we will use this knowledge instantly within a “Case Study” or “Final Project” to **simulate a very basic implementation** with a fictitious end-client. With the help of the instructor you will understand main steps to implement and typical challenges to do it.

This course **does not include the technical knowledge** required to perform a basic Openbravo ERP implementation which is given during 5 days of the Customizing & Basic Development Training.

II.Audience: Who is training aimed at?

Training is divided up into individual modules, each covering one functionality or area. Training is meant for potential and current partners, consultants, developers, and any trainee looking to analyze the usability and capabilities of Openbravo ERP and/or implement it.

Some experience in ERPs is helpful, but not required.

III.Conference Schedule

During the five - day training, the Openbravo team delivers a specific set of training sessions, broken up in the following schedule:

	Day 1	Day 2	Day 3	Day 4	Day 5
9:00	Arrival Check - In	Sales/CRM Management	Material Resource Planning (MRP)	Financial Management	Initial Configuration and Master Data Management
10:00					Final Project Functional Case
11:00	Welcome Introduction To Openbravo		Project Management		
12:00	Break	Break	Break	Break	Break
13:00					
14:00					
15:00	Procurement Management	Production Management	Project Management	Implementing Openbravo:	Final Project Functional Case
16:00					Initial Configuration and Master Data Management
17:00	Warehouse Management		Financial Management		
18:00					
19:00					

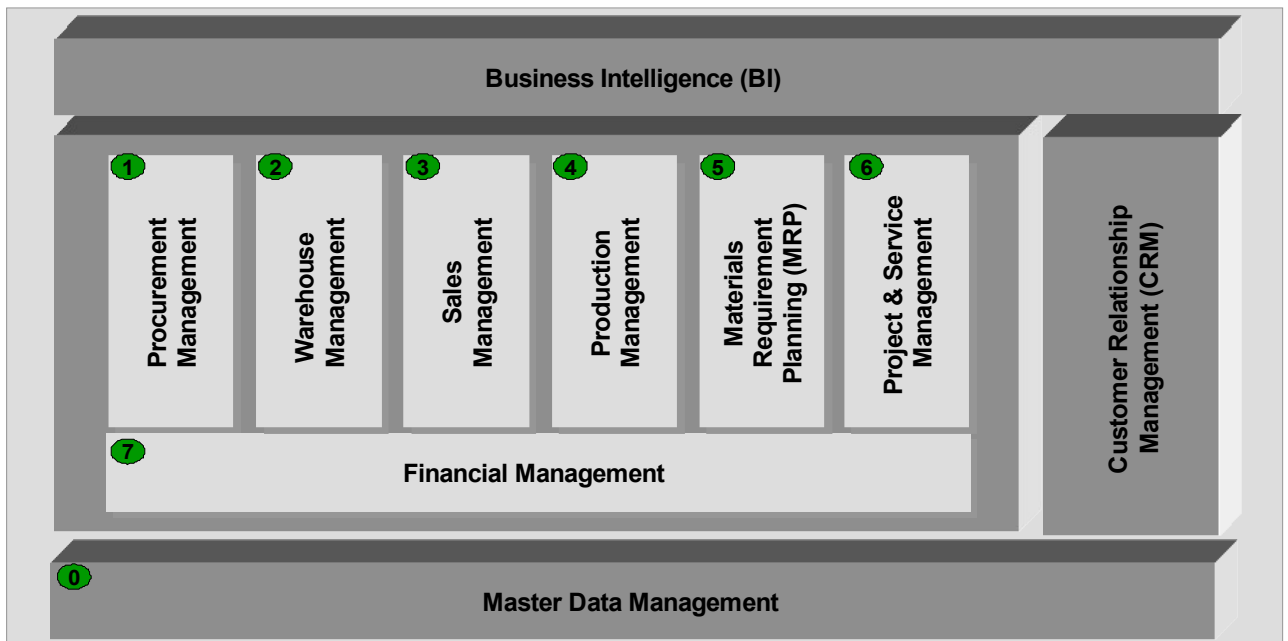


IV. Module Description

I.1 Module F1: Functional Features

Audience: Consultants, project managers, directors

Requirements: Basic understanding of business concepts.





Session	Description	Objective	Duration
0 – Introduction to Openbravo	Introduction to Openbravo including all sides: business, functional and technical First steps on initial configuration	Understand the overall picture. Understand what will you learn during the course and how should you approach to optimize learning.	2 hours
1 - Procurement	Procurement processes: - Order, goods receipt, invoice Suppliers by product Rates and purchase discounts Includes Exercises.	Understand how this functionality works. Be able to configure this module according to the needs of a specific client	2 hours
2 - Warehouse Management	Warehouses and locations, (Multi-warehouse), batch and serial numbers, stock by product in double unit Physical inventory, movements between warehouses. Product valuation Traceability Includes Exercises.	Understand how this functionality works. Be able to configure this module according to the needs of a specific client	2 hours
3 - Sales Management and CRM	Sales processes: - order, shipment, invoices, different ways to operate (different execution orders and different types of documents). - Application of prices: prices, discounts, scales and control of price limit, rebates, commissions and carriers. CRM management: definition and execution. BI: analytical multidimensional reports. Includes Exercises.	Understand how this functionality works. Be able to configure this module according to the needs of a specific client.	4 hours



Session	Description	Objective	Duration
4 - Production Management	Product assemblies and kits, use of bill of material Discrete and repetitive production Production plans: - Definition of versions, phases, products, and use of cost centers. - Work orders, break down/addition of the associated plan. - Manufacturing and maintenance reports, entry of hours, consumption and productions (integration with warehouse), and standard and real cost calculations. Includes Exercises.	Be able to configure this module according to the needs of a specific client	4 hours
5 – Material Resource Planning (MRP)	Management of company's material planning. Purchase of raw materials, needed products for operation as well as production of finished products need to be planned in terms of quantity and time horizon. MRP takes certain inputs and outputs documents within the system that automatically take care of the requirements. Includes Exercises.	Understand principles of the MRP system, especially its inputs and outputs. Be able to configure basic MRP behavior.	3 hours
6 – Project and Service Management	Management of service type projects, phases, tasks, management of order type projects, budgets, generation of orders from templates, invoice to origin, rates by project, follow-up of commercial actions, generation of purchase orders. Entry of expense sheets, dedicated hours. Reimbursement of expenses and invoicing of work performed for a client. Profitability reports. Includes Exercises.	Understand how this functionality works. Be able to configure this module according to the needs of a specific client	3 hours



Session	Description	Objective	Duration
7 - Financial Management	<p>General ledger: Accounting configuration, accounting plans, manual entries, standard entries, trial balance, journal entries, general ledger, P&L account, balance sheet, income statement, and multidimensional analysis (BI). Accounts payables and account receivables: Payment management (cancellation, union and division), remittances (according to bank journals), cash journals (cash audit), bank reconciliation, manual settlement, other payments (salaries, taxes, etc.), cash, bank, and payments reports - Fixed assets: Definition of the elements of fixed assets, acquisition price, depreciation, and accounting valuation Includes Exercises.</p>	<p>Understand how this functionality works. Be able to configure this module according to the needs of a specific client</p>	6 hours
0 – Initial Configuration Master Data Management	<p>Initial configuration: - Clients and organizations, roles and users, menus, initial client setup, and importing data Business partners (clients, suppliers, employees): - Addresses for internal use, contacts associated to addresses, business partners groups, sale and purchase prices, invoice mechanisms, payment forms and terms, allowed risk salesmen, segmentation, and delivery routing. Products: - Measurement units, product categories, prices and billing schemes, processes to generate prices, type of product (item, service, cost), product attributes, substitute products. Includes Exercises.</p>	<p>Understand the fundamental elements of Openbravo: clients, organizations, roles, users, etc. Create a new organization and explain how the tools to import data work Understand the main master data in OB and how they are used regarding each functional area Execute the basic customization steps</p>	5 hours



Session	Description	Objective	Duration
Final Project - Functional Case	The case study deals with all issues covered throughout the training. Includes Exercises.	We will present you with a real life situation that will require the use of Openbravo and all functionalities we have discussed during the previous week. To solve it, you will have to apply all knowledge gained throughout the course.	4 hours

V.Required Material

The only material requirement is for each participant to come with a personal laptop. This laptop must be equipped with Wifi capability and have a minimum of 512 RAM. Openbravo does not need to be preinstalled since you will be connecting to our local server. Firefox 2.0 or Internet Explorer 7.0 or higher are required for full functionality of Openbravo. All other materials are provided by Openbravo.

VI.Language

Trainings are given in English or Spanish depending on the specific course. Please see the details on the web:

<http://www.openbravo.com/services/by-service/training/scheduled-training/>

VII.Conference Location and Hotel Booking

Conference Location depends on the specific course. Plse see the details on the web:

<http://www.openbravo.com/services/by-service/training/scheduled-training/>

VIII.Price and Registration

Please check the information on-line:

<http://www.openbravo.com/services/by-service/training/scheduled-training/>



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Openbravo reserves the right to change the timing of sessions throughout the training days, as well as the order in which material is presented. Openbravo also reserves the right to cancel or move the dates of the training session up until 3 weeks prior to the start date.