



Basic Technical Training

Online Course Guide

2.50v5 2010



www.openbravo.com



I. Course Summary

The objective of the Basic Technical Training is to give partners and consultants the chance to learn the **fundamental technical knowledge** required to perform a **basic Openbravo ERP implementation**.

This course is designed as **an active self-study training** supported by an Openbravo training specialist. The course requires roughly **40 hours of dedication** which the student may invest as he or she sees fit across the **4-week availability**. Students will be given materials, exercises, tests, their own virtual environment and assistance from our instructors. This way we aim for a unique, but even more, an efficient hands-on learning experience by real examples. We would like to emphasize that this course is **not a set of live or passive webcast sessions**.

By the end of the course **the student will have deployed and packaged a complete real life instance of Openbravo ERP application according to a fictitious customer's requirements given**.

This course **does not cover** the **functional knowledge** required to complete an implementation which is given during the *Basic Functional Training*.

II. Requirements

IV.1 Target Audience

This course is aimed at potential and current **partners, consultants, developers**, or any trainee required to learn the skills needed for a basic implementation of Openbravo ERP.

IV.2 Knowledge Prerequisites

- basic **functional knowledge** of Openbravo ERP
- good knowledge of **SELECT queries (SQL)**
- basic **system** and **database administration**
- **ERP consulting experience** is a considerable plus

IV.3 Computer Requirements

- **dual core** processor (2GHz or faster)
- **2Gb RAM** or more
- Compatible **web browser**: Firefox 3.0 or later, Internet Explorer 7.0 or later, Safari 3.0 or later
- latest release of Openbravo ERP installed with Postgres database (all materials and



solutions are based on it). If not, a virtual machine should be used.

III. Course Schedule

This course is based on a **self-study model** with an estimated **40h student dedication** required. During the **4-week availability** and **tutor support**, the student can **choose his or her own pace** to follow and go through the chapters to complete the course. The following topics are covered by this training (see next section for details on these):

- Openbravo User Interface
- Setup and System Configuration
- Modularity
- Client Setup
- Data Architecture
- Roles & Users
- Application Dictionary
- Reporting
- Goodies
- Packaging and The Development Cycle

Live sessions provided by the course are:

1. **Monday of the first week @ 4PM CET:** a welcome webcast session with the instructor
2. **Thursday of the last, fourth week @ 5PM:** a wrap up webcast session with the instructor
3. **Each Thursday** during the 4-week course duration:
 - o 9AM CET – live IRC chat/support
 - o 5PM CET – live IRC chat/support

Note: This course is an **active self-study training** rather than a set of passive webcast sessions. The student **has full access to all course materials** and **tutor support** during the **entire 4-week availability**.

IV. Topics

IV.0 Welcome and Introduction

This first session will welcome you to the course, present the schedule and give you an overview of the topics and assignments.

To resemble a real-life scenario, an Openbravo ERP implementation will be simulated for a **pet food distributor** called **Woof Inc**. The following scenario and its requirements will be presented and later on implemented:



- client needs to automate **procurement, warehousing and sales**
- its **retailers need to have access to the system** so they can enter sales orders by themselves, of course without accessing any other vital information of the *Woof Inc* business
- **main reports customized** with their logo and an additional field CreatedBy visible so that they can see who created it
- **an alert must indicate** new Sales Orders entered directly by a retailers
- they run **two departments**, the **food sales** and the **services sales** and they want separate reporting for each
- a **simpler menu** where daily items are accessible directly from the root level
- **product window** is too complicated as is, must be simplified
- they require an **image for each product** to be kept in the system
- they have a large number of **retailers** they would like to **import**
- they need a **full audit trail** of orders, invoices, payments and products

IV.1 Openbravo User Interface

The use of the application and the common behavior of the user interface will be discussed and shown within this chapter. Consequently, this gives an idea of the elements and the terminology that is referenced and can be customized later on.

IV.2 Setup and System Configuration

Before any other task, a development environment needs to be set up and configured.

All exercises and customizations within this course will have to be performed on the latest version of Openbravo ERP, **activated** with the Openbravo Professional Subscription.

The following tasks will be shown and discussed:

- deployment options, in particular, virtual appliances
- activation of an instance
- setting up logos
- system settings
- audit trail



IV.3 Modularity

Development of any artifact in Openbravo ERP v2.50 or later must be part of a module. Modularity is an important concept of the application that all consultants and developers must be aware of and will be discussed here.

The student will first learn how to install and take advantage of existing external modules, free community ones as well as commercial ones:

- Spain Localization Pack
- Initial Data Load
- Easy Extensible Attributes

Afterwards, a **new Woof Inc template + module will be created** which all subsequent adjustments will belong to.

IV.4 Client Setup

Before any data can be configured or adjustments made, a new client and the organizational structure needs to be set up. The following concepts and processes will be covered within this chapter:

- multi-tenancy concept
- Initial Client Setup process
- Initial Organization Setup process
- warehouse setup
- minimum required functional setups

IV.5 Data Architecture

Before legacy data can be imported and screens or reports can be extended and developed, a good knowledge of the underlying data structures is of utmost importance. Two related topics will be presented:

1. Openbravo ERP **Entity-Relationship (ER) diagram**
2. **Import of legacy data** using the Initial Data Load module
3. **Data partitioning** (system vs client)

IV.6 Roles and Users

As the title suggests, privileges grouped into roles and users assigned to them will be presented. Having a multi-tenancy environment, the System vs Client administrator role concept is new and explained here. The student will learn to



define a few roles and users on top of the *Woof Inc.* scenario and its requirements. User preferences will also be discussed here.

IV.7 Application Dictionary

One of the major strengths of Openbravo ERP is its Model Driven Development (MDD) architecture. Openbravo calls its metadata the **Application Dictionary**. This metadata contains the majority of the UI definition and is very important to master when it comes to adjusting the application as well as defining new UI elements.

The following concepts will be explained and practiced:

- tables and columns (adding a new column and field)
- references (data types and input widgets)
- windows, tabs and fields (changing existing windows as well as defining new ones)
- application element (changing labels and help text)
- application menu (customizing the menu and defining new items)
- re-compilation of the application to reflect the changes made

IV.8 Reporting

The majority of reports within the application are based on the Jaspersoft engine. Hence, the student will learn about it and how to execute the most common tasks:

- use of iReport to design reports
- customizing core reports (adding logos and additional fields to a Sales Invoice)
- creating new reports from scratch (using the wizard vs manual design, various formats, user parameters, security issues, adding graphs)
- ways of embedding reports into Openbravo ERP application

IV.9 Goodies

There are a few smaller but interesting topics we would still like to show you within this chapter:

- creating alerts
- background services



- pulling information from Openbravo ERP through webservice

IV.10 Packaging/Development Cycle

By this point, the student will have several developed and customized artifacts done compared to the out-of-the-box Openbravo ERP. Packaging them together and migrating them to the customer's site is the next logical step. Here are a few tasks you will be taught:

- packaging the module/template
- exporting a client
- migration to the production site using the Openbravo Professional Subscription appliance
- recommended development-testing-production process

V. Course Materials

Upon payment, you will receive the username and password used to enter the <https://university.openbravo.com/login/index.php> e-learning platform. This platform will be used as the main interaction between you and the Openbravo Training team. The following elements will be present to deliver the ultimate course experience:

- **News blog** where live sessions and other news will be published
- **Documentation** for each topic and assignments that can be printed out
- Links to **Howto articles** and additional readings
- **Q&A forums** monitored and answered by an Openbravo training specialist
- **Exercises and assignments**
- **Evaluation form**
- Embedded **IRC live chat sessions/support** tutored by Openbravo training specialists
- A link to a **private virtual instance** of Openbravo ERP application where exercises will need to be executed

NOTE: All written materials are only available in English.

VI. Terms and Condition

This course is subjected to detailed Terms and Conditions available here: <http://university.openbravo.com/university-terms.html>



VII. Price and Registration

Please check the information on-line

<http://www.openbravo.com/services/training/>



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Openbravo maintains the right to cancel a training session. For more information regarding this policy, contact training@openbravo.com.