Your ERP Partner

Module 3
ADempiere Basics

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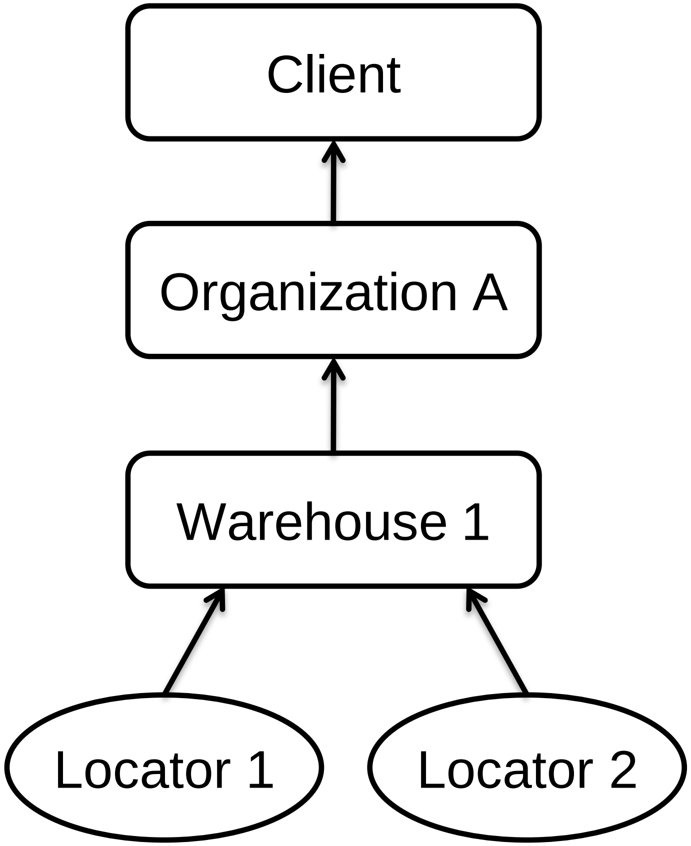
Module Objectives

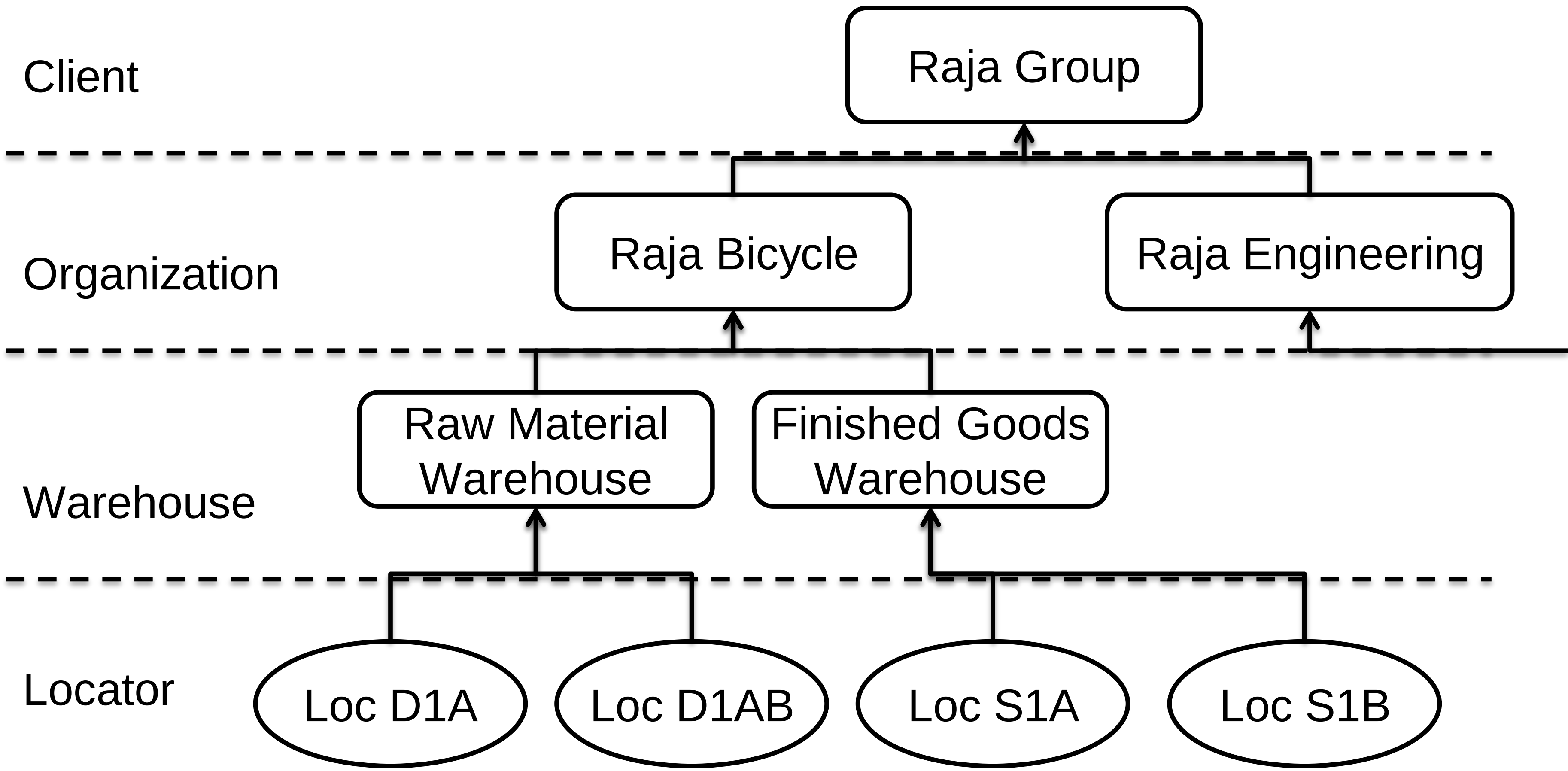
- Understand how Organization Structure fit into ADempiere
- Understand User Interface of ADempeire
- Get Familiar!

How Organization Structure fit into ADempiere



- Company
- Facility / Plant / Division / Business Unit
- Warehouse
- Internal location inside warehouse

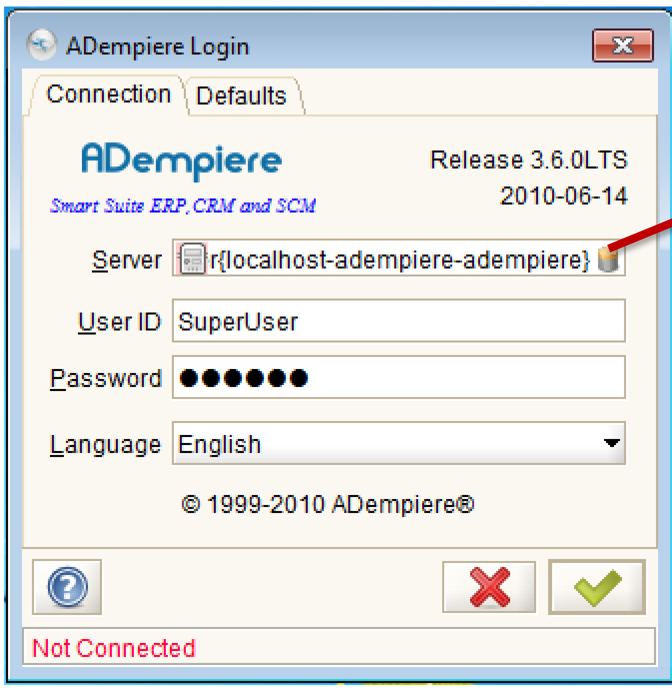
Sample Organization

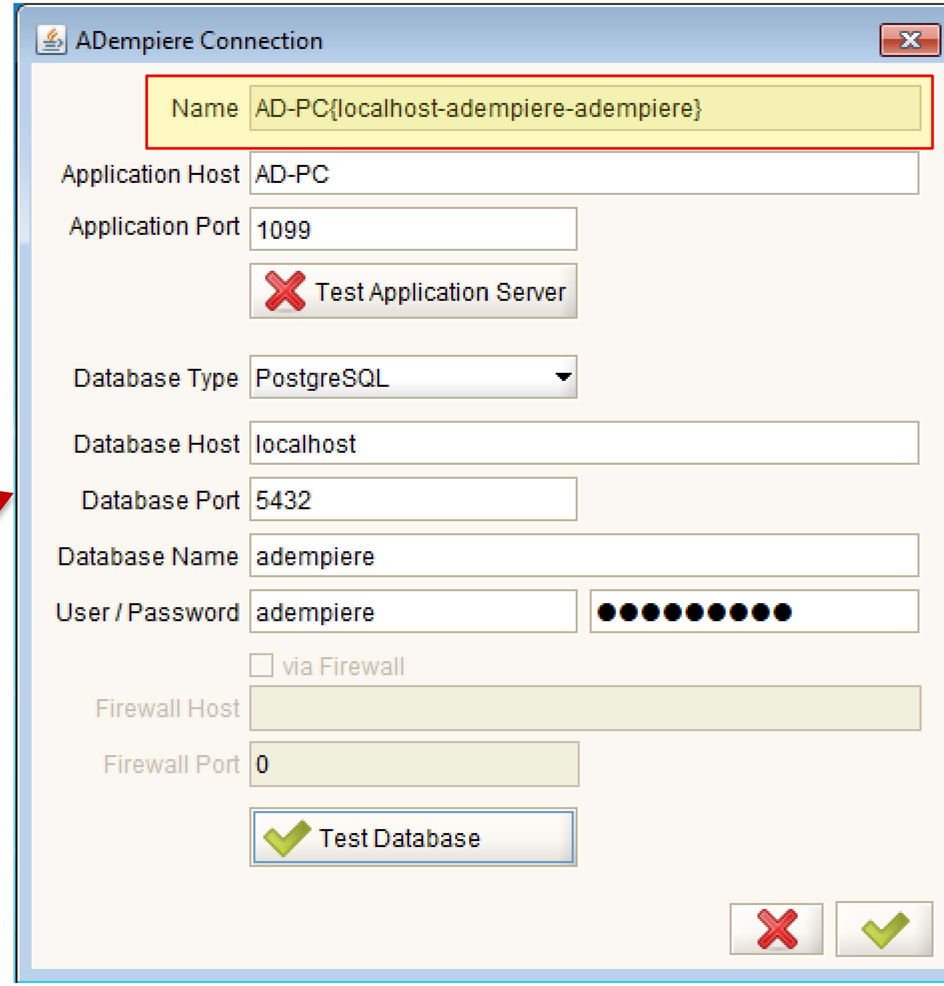


Login Screen

Setup the connection

1. Server
2. Database



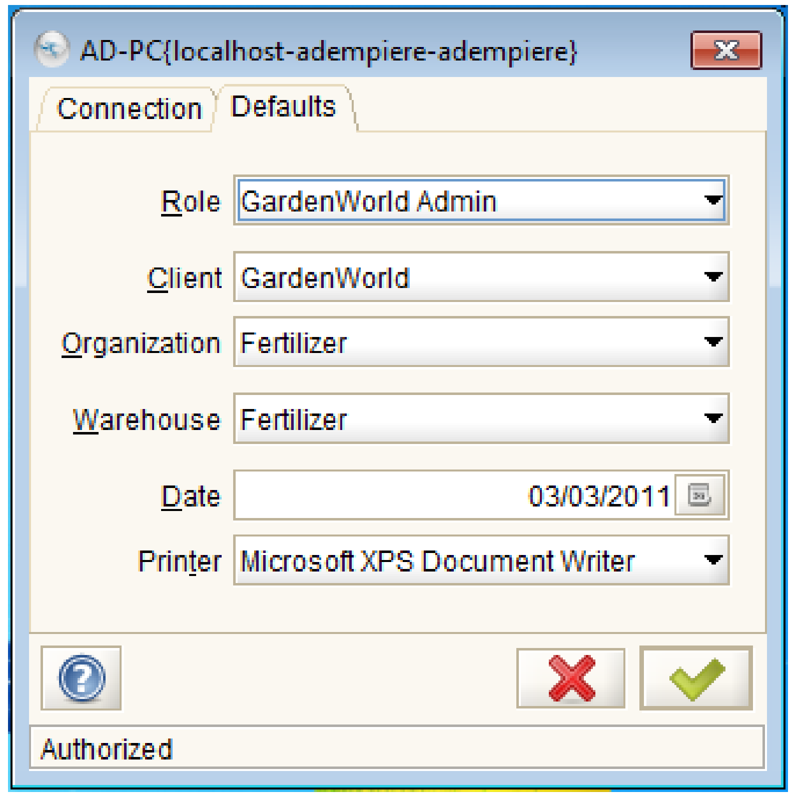


The Client will still operate if the database is available but the application server is not running.

Login Screen (Defaults)

Defaults

- Role
- Client
- Organization
- Warehouse
- Date
- Printer



Client / Organization / Warehouse *will be available based on Role's access rights. This will give the default selection when using ADempiere, but it is still changeable inside ADempiere.*

Understanding Client and System Users

1. **Client Users**

   - Access Client information, i.e., GardenWorld Client

2. **System Users**

   - Perform system related tasks, such as accessing and configuring the **Application Dictionary**

*** Predefined Logins ***

Usage	User	Password
System	**System**	**System**
System + Client (admin)	**SuperUser**	**System**
Sample Client (admin)	**GardenAdmin**	**GardenAdmin**
Sample Client (user)	**GardenUser**	**GardenUser**

*With the **Application Dictionary**, **you can perform low-level configuration, such as:***

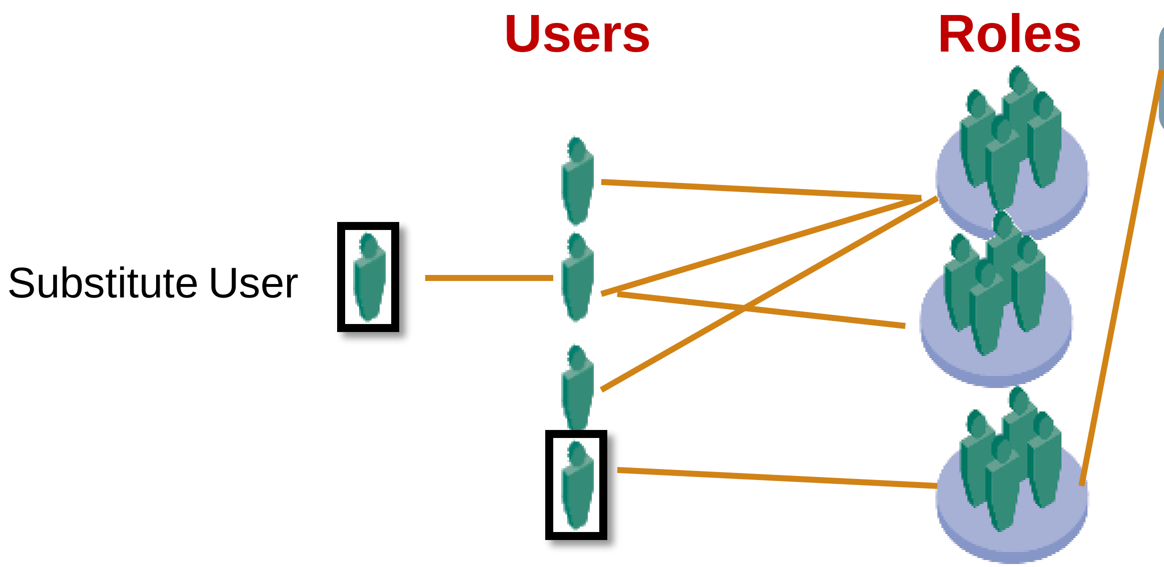
✓Configure the Table and Column definitions to save your data

✓Construct a Window, Tab, and fields to build your ADempiere window

✓Set up a Report and Process to generate your reports

Most of these parts can be done without altering the ADempiere source code.

Role Access Rights



Org Access

Window Access

Process Access

Form Access

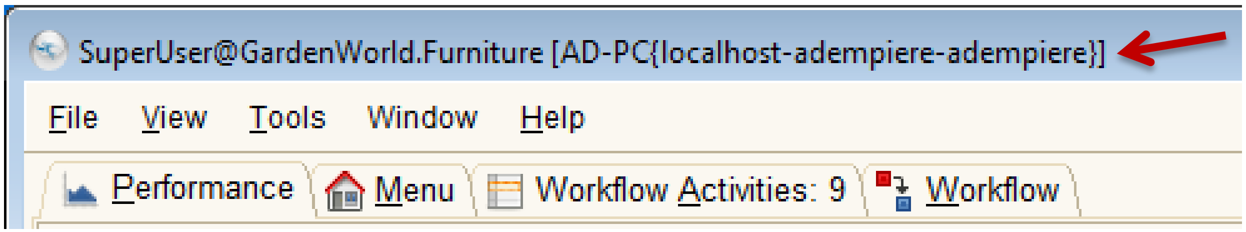
Task Access

Document Access

Restricted Access Record, Table, Column, Report, Export, etc.

All security setting are defined in Role
A user can have a substitute user, which will inherit all roles under it

Which ADempiere server are we working on?



user@client.warehouse [adempiere_server_computer_id {database_server_computer_id-database_name-database_user-id}]

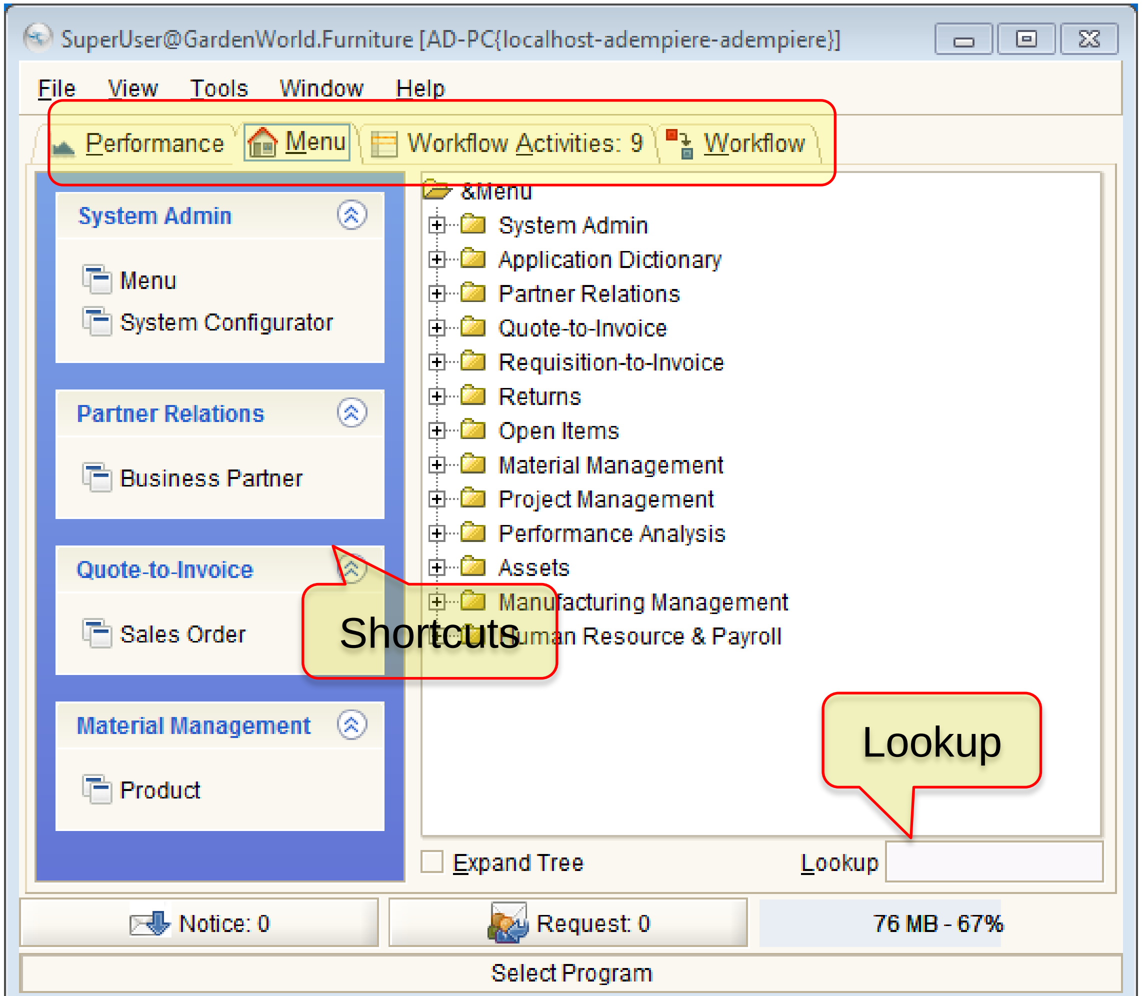
For Example

- Login User = SuperUser
- Client = GargenWorld
- Warehouse = Furniture

- Server ID = AD-PC
- DB Server = localhost
- DB Name = adempiere
- DB User = adempeire

Sometimes, after changing your ADempiere server connection, you need to check which ADempiere server you are working on. To do so, after logging into ADempiere, you can check the value displayed at the top of the main form, as shown in the above screenshot

ADempiere User Interface

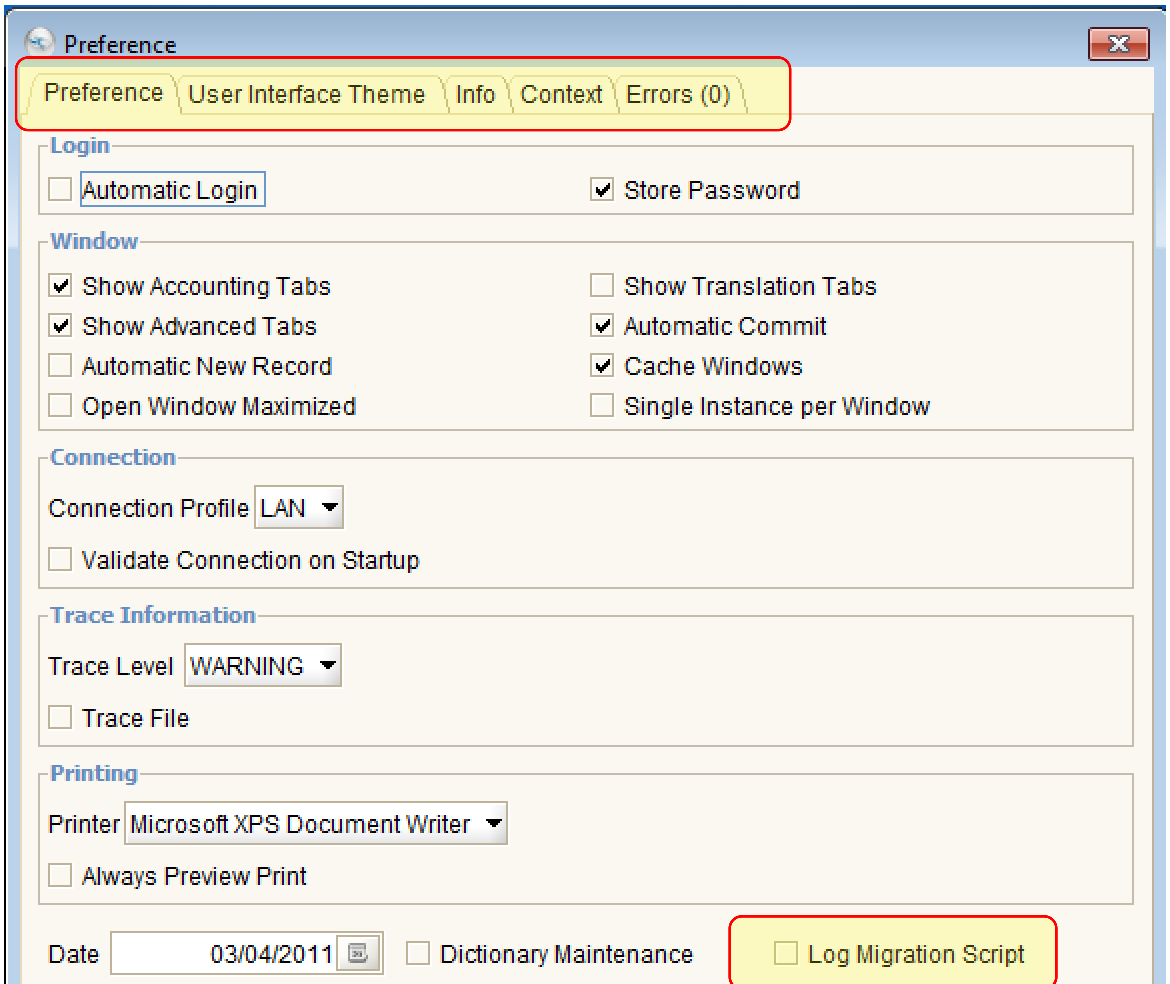


4 Main Tabs

- Performance
  - Contains a list of performance goal charts and bar charts
- **Menu**
  - Access Windows, Forms, Reports, Processes, and General Workflows. Examples of menus are **Purchase Order, Sales Order, Product,** and so on, based on Access Rights given to the **Role.**
- Workflow Activities
  - Notifications / Approvals
- Workflow
  - General workflow as guidelines

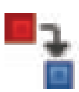
Preferences

- Tools > Preference



- Preference
  - This configuration is saved on the local computer and will work only on this computer.
- UI Theme
- Info
- Context
  - Internal ADempiere Variables. Use a lot when doing Development
- Errors

Working with Menu Icon

Icon	Description
	**Normal ADempiere Window or Form:** This window is used for managing records, entering records, or viewing our transactions (for example, Purchase Order, Sales Order, and Accounting Fact Balances), etc.
	**Process:** This performs tasks or jobs that could be done in the database (for example, Generate Shipments and Update Accounting Balance).
	**Reports:** Generates reports, which can be modified, exported, and printed easily (for example, Trial Balance and Statement of Accounts).
	**Reports:** Generates reports, which can be modified, exported, and printed easily (for example, Trial Balance and Statement of Accounts).

More on Standard Windows

Tools Bar available on the main menu

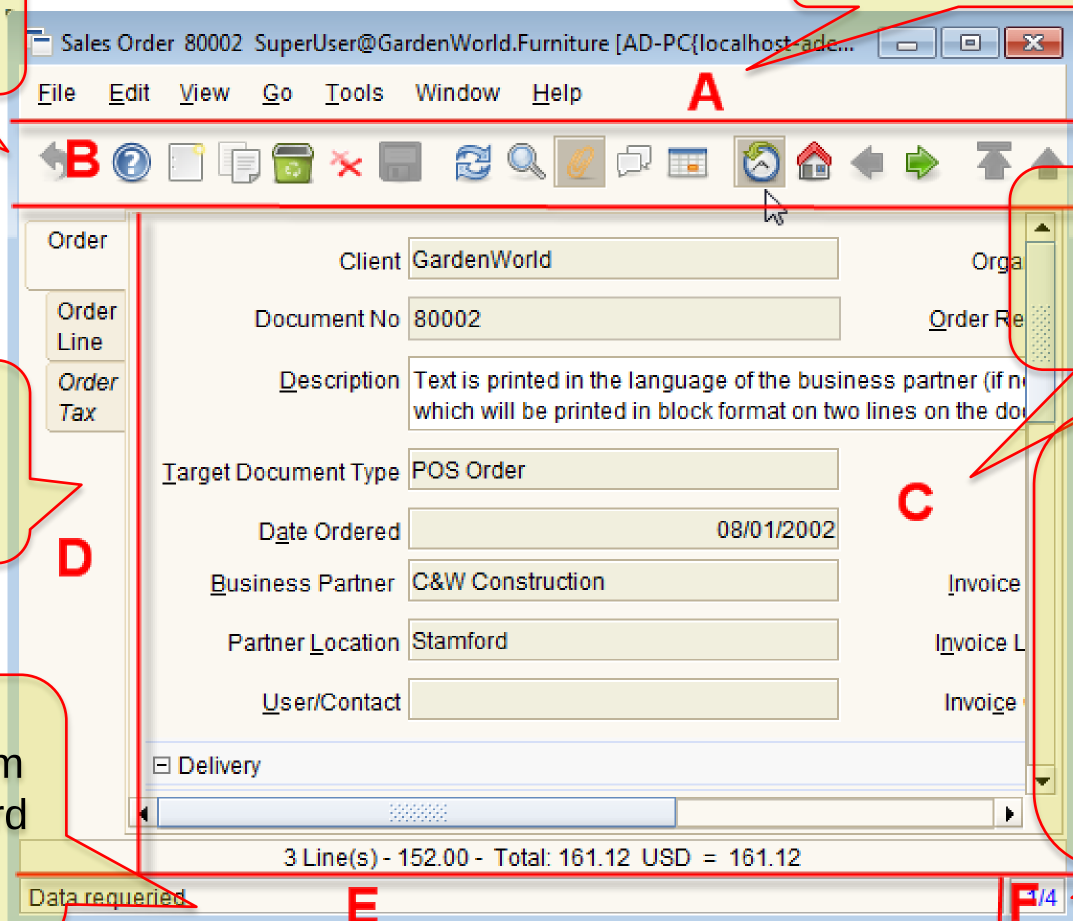
Main Menu

Main Area for Viewing Information

List of Tab, use as **master detail** information

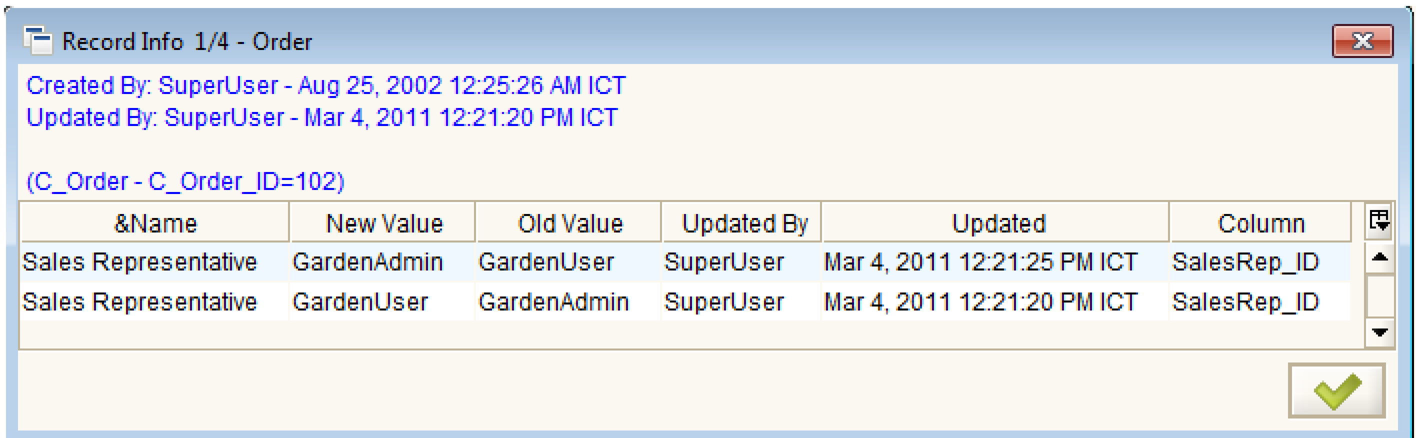
Record Info, showing database name and record ID.
Also change logs.
(double click on it to see the info)

Status bar showing system info, i.e., Record Saved, Total Value, etc.



More on Record Info

Click on part **F** of the window,

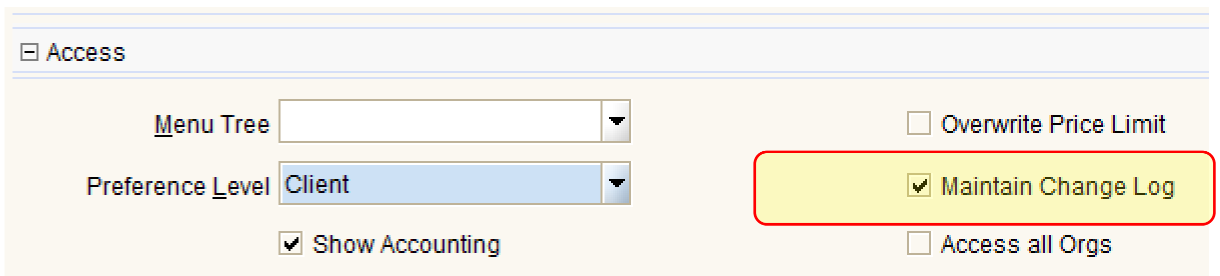


- Table name of this record is **C_Order.**
- The Primary Key for the **C_Order table** is **C_Order_ID,** and has the **value 102**
- If the auditing feature is enabled, you will see the **change log**

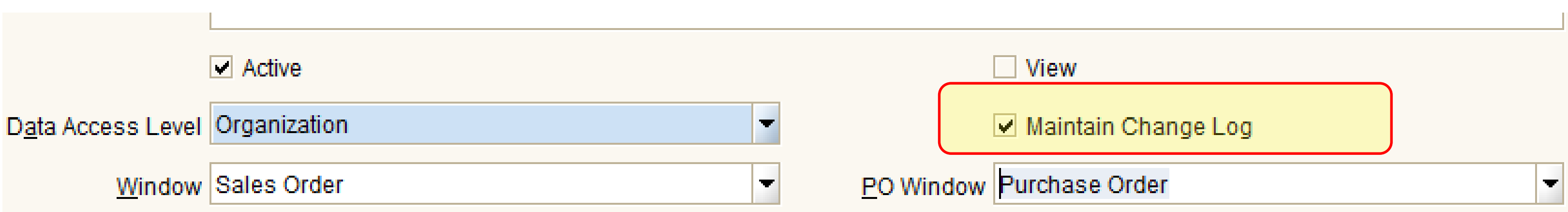
More on Change Log

2 Ways to enable Change Log

1. **By Role**
   - Login as Client Admin
   - Open Role window, browse to the Role, i.e., GardenAdmin



2. **By Table**
   - Login as System Admin
   - Open Table and Column window, search for required table, i.e., C_Order



Data Types in ADempiere

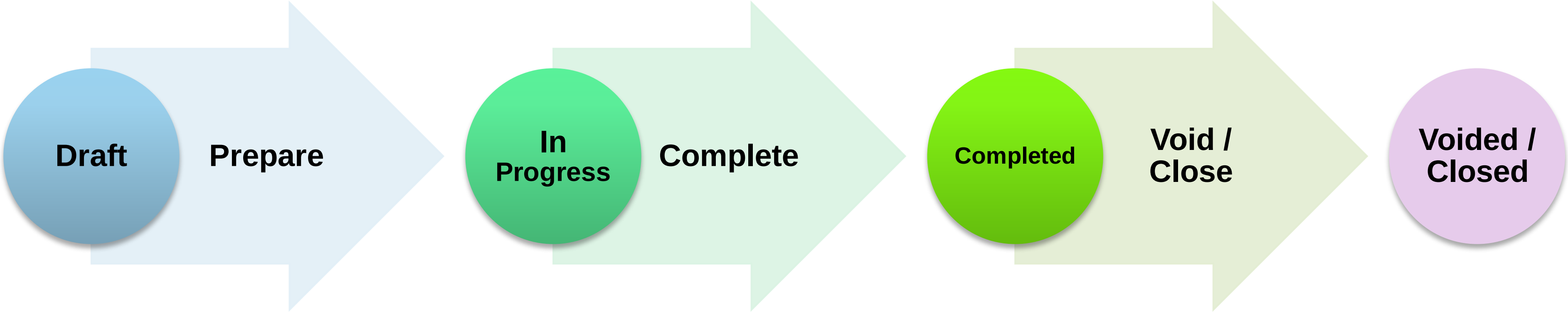
1. Master Data

– i.e., Chart of Account, Business Partner, Products, Tax Rate, etc.

2. Transactional Data

– ADempiere call it **Document**, i.e., Sales Order, Payment, Shipment, Invoice, etc.

– And govern the flow of Document Process by **Doc Status / Doc Action**



Performing Tasks

Icon	Description	Shortcut
	New: Click on this button when you want to add some information or data.	*F2*
	Save: After you finish entering or updating your data, click on this button to save the information to the database.	*F4*
	Cancel: Use this button to cancel or ignore your changes.	*Esc*
	Copy Record: Duplicate the value of existing records to new records.	*Shift + F2*
	Delete: Delete active records. For some data, you cannot delete the records. This is intended for auditing purposes. Instead, you can set their status to inactive.	*F3*
	Delete multiple: Delete selected records or items. You will be prompted with a **Delete Selected Items** window, which contains a list of record IDs and document numbers, before proceeding with the deletion.	*Ctrl + D*
	ReQuery: Get the latest data, for the active records, from the databases.	*F5*
	Grid Toggle: Show detailed information of one record only. This is suitable for adding (entering) or editing data.	*F8*
	Grid Toggle: Shows the list of data or records in a grid mode.	*F8*

Icon	Description	Shortcut
	First record: Go to the first record in a document.	*Alt + Page Up*
	Previous record: Go to the previous record in a document.	*Alt + Up*
	Next record: Go to the next record in a document.	*Alt + Down*
	Last record: Go to the last record in a document.	*Alt + Page Down*
	Detail record: While working with a master detail document, clicking on this button will move your pointer (active record) to the detail records of the document.	*Alt + Right*
	Parent record: While you are in the detail document (within a master detail document), clicking on this button will move your pointer (active records) to the master records of the document.	*Alt + Left*
	History record: When opening a transactional window, such as **Purchase Order**, for the first time in the login session, just click on this button to show partial data (for a day, week, or year) or all of the records.	*F9*
	Lookup Record: Intended to search your records by criteria. There are two tab options available for the purpose of searching. The first tab is for standard searching, and the second tab is for advanced searching. With advanced searching, you are able to search records by column name and can specify the data range.	*F6*

Other Tasks

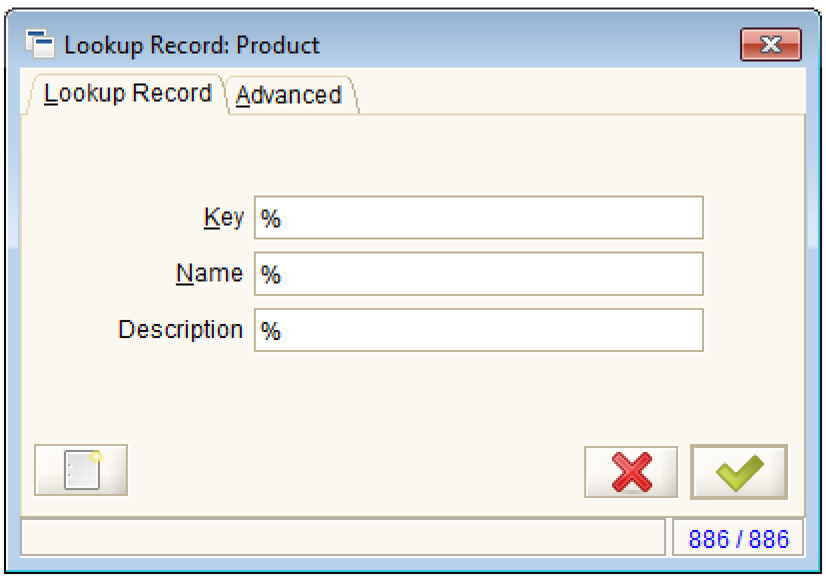
Icon	Description	Shortcut
	Report in columnar format: With a master detail data, we shall print the header information only with this printing feature.	*F11*
	Print Preview: This will preview a document. It is suitable for the purpose of checking.	*Alt + Shift + P*
	Print: Printing the final document to the printer. With the **User Preference | Always Preview Print** configuration, we are able to preview the document before taking a final print.	*F12*
	Chat: This is used for communicating with other ADempiere users. For example, you could make a clarification or confirmation related to an active document. This chat conversation will be recorded in the internal database.	
	Menu: Go back to the ADempiere client main menu.	
	Attachment: Add or attach a soft copy of a supporting document, or add some information related to the document, if necessary.	*F7*
	Archive: When making a **Report** or **Print**, we can save an archive of our report or print for documentation purposes. We can access our archive's reports with this menu or access it via the **Archive Viewer** window.	

Icon	Description	Shortcut
	Zoom across: This is used to see the list of documents created, using a reference to a particular selected data. For example, open your **Menu | Partner Relations Business Partner Rules | Business Partner** window, and find the **C&W Construction** record. When we click on **Zoom across** for this business partner, it will show a list of documents (**Sales Order**, **Shipment (Customer)**, and so on) or records (**User**) that use this business partner's information.	
	Help: Information about the purpose of the window and the meaning of each field.	
	Exit window: Close the window, and go to the main menu.	*Alt + X*

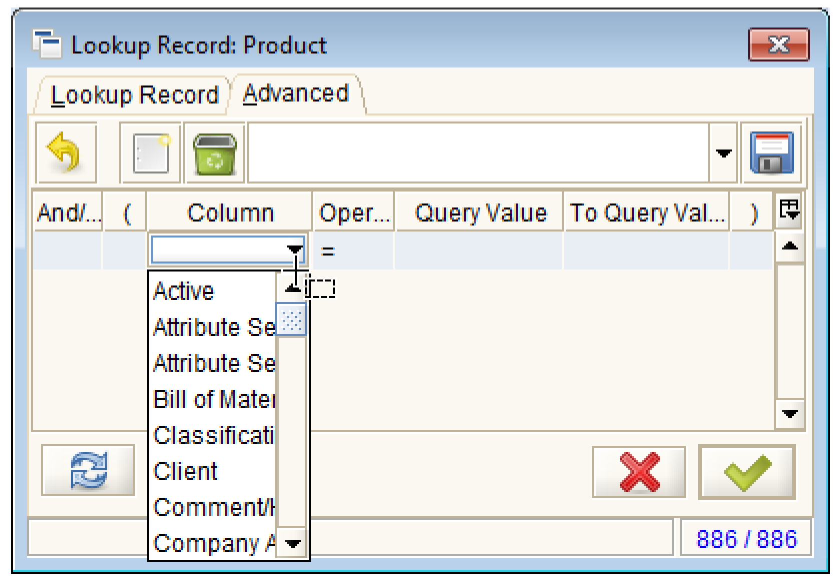
Search for Data in Standard Window

- Lookup 
  - To screen only the required data

Basic

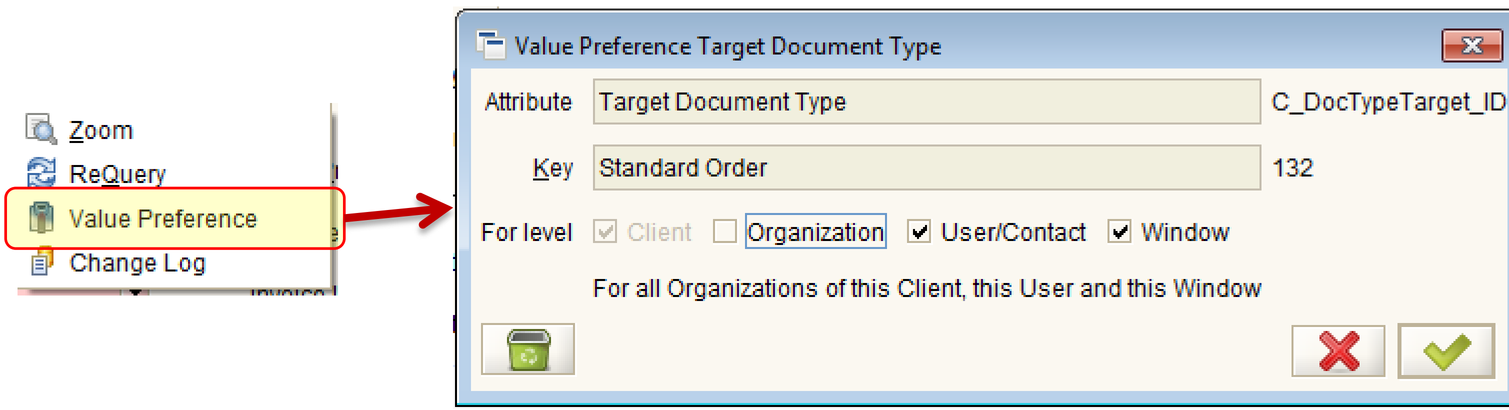


Advanced



Value Preferences

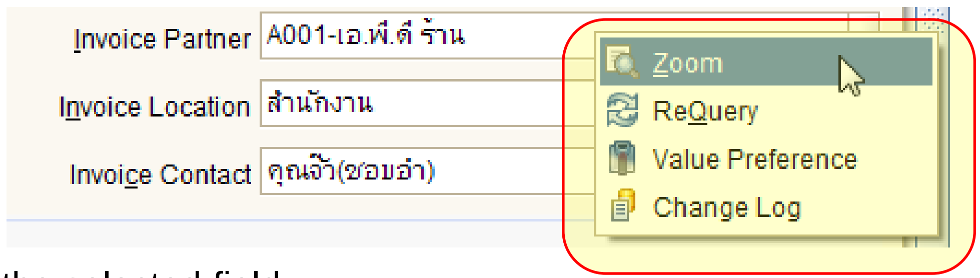
- Value Preference
  - Setting the default value on a field.
  - Right click on the field for Context Menu and select Value Preference.
  - Select **For level** to define scope of use.



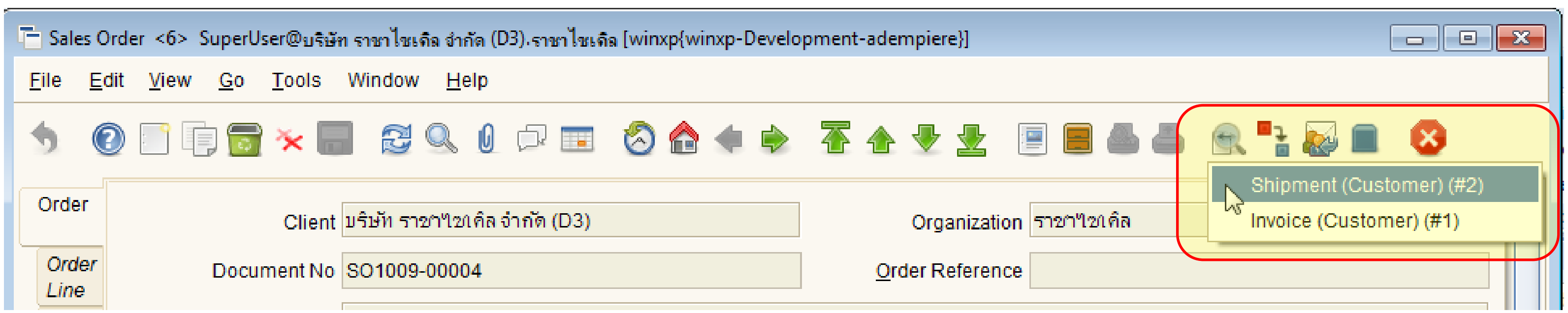
For example, open a Sales Order window and point your mouse to the Document Type field, and then pick Document Type from the list. We can make Standard Order as default values a default value by right-clicking and selecting the Value Preference menu, and then selecting the Organization checkbox, User/Contact checkbox, and Window checkbox, as shown in the above screenshot

Context Menu and Zoom Across

- Field Context Menu
  - Right click for
    - Zoom → go to data
    - ReQuery → update data
    - Value Preference → default data
    - Change Log --> view the change of the selected field.

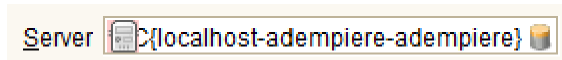


- Zoom Across 
  - See relate data, i.e., What document are related to by this Sales Order

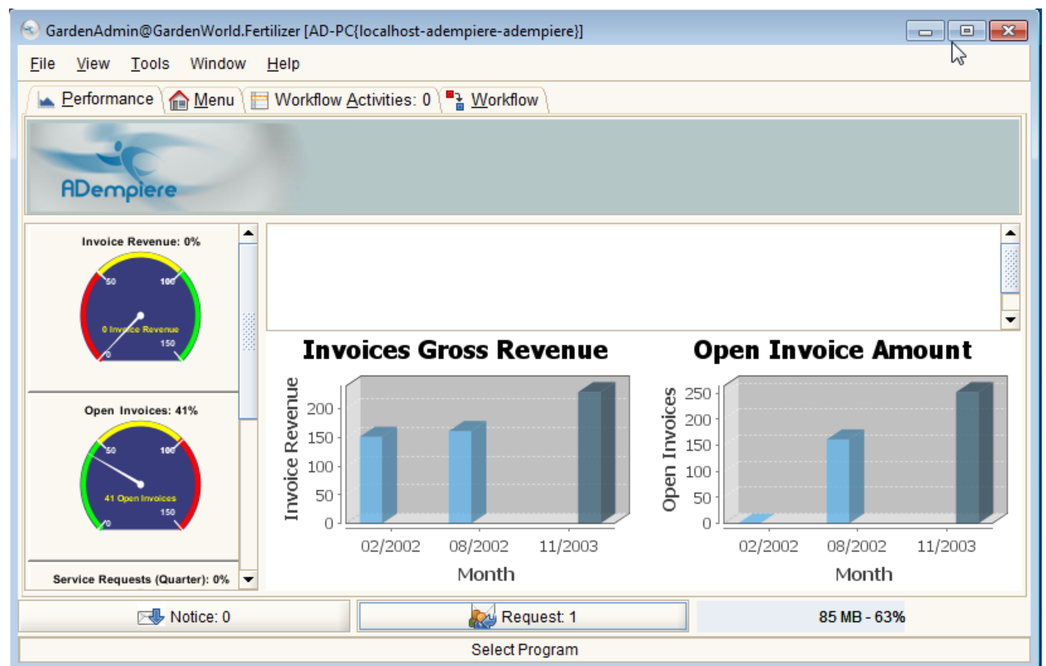


WORKSHOP

Explore ADempiere

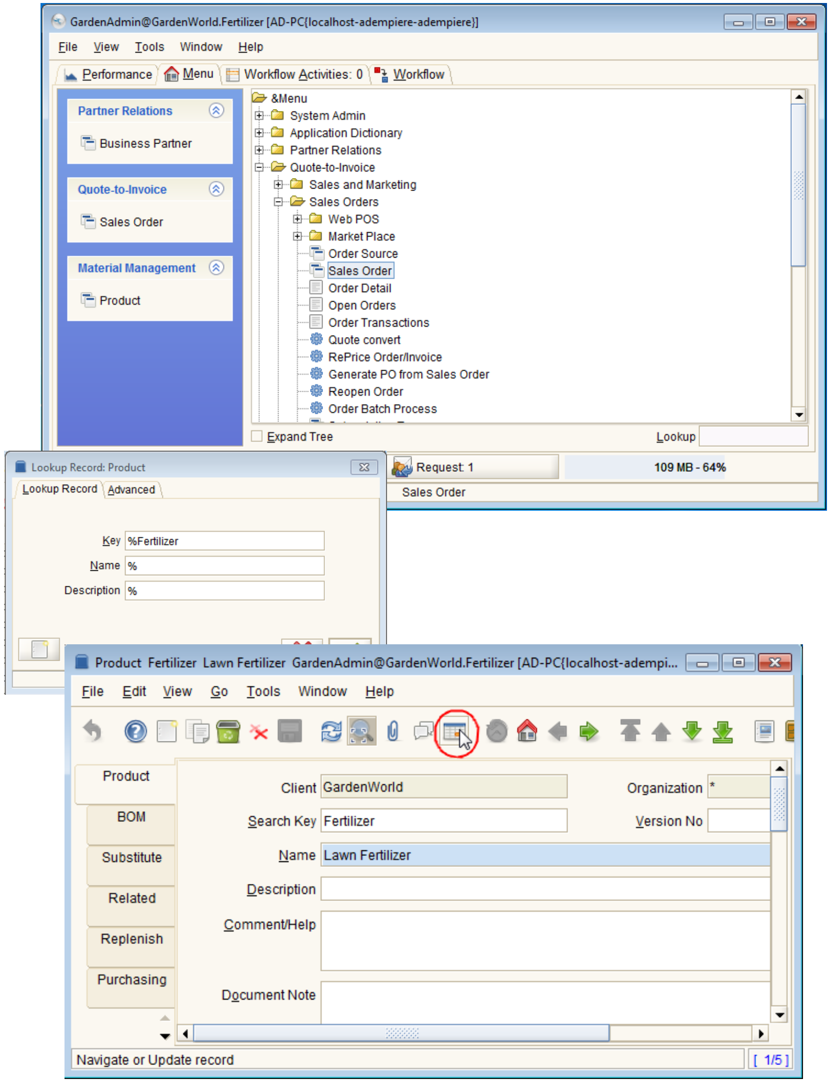
- Navigate to C:\ADempiere\Utils, execute Run_Server2.bat to start server
- Open ADempiere Client and test Server Connection
  - Click on Server Connection 

  - Click on Test Application Server and Test Database button. See if everything is running properly.
- Login to ADempiere
  - **Username:** GardenAdmin
  - **Password:** GardenAdmin
  - **Role:** GardenWorld Admin
  - **Client:** GardenWorld
  - **Organization:** Fertilizer
  - **Warehouse:** Fertilizer
- Explore Performance Dashboard
  - Try double click on chart to drill to the relevant information
- Explore Menu Tab
  - Click on Menu Tab



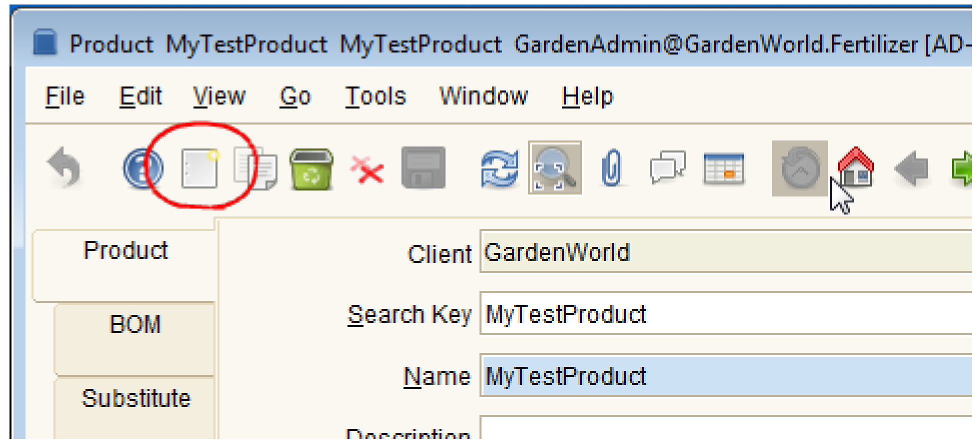
Explore ADempiere

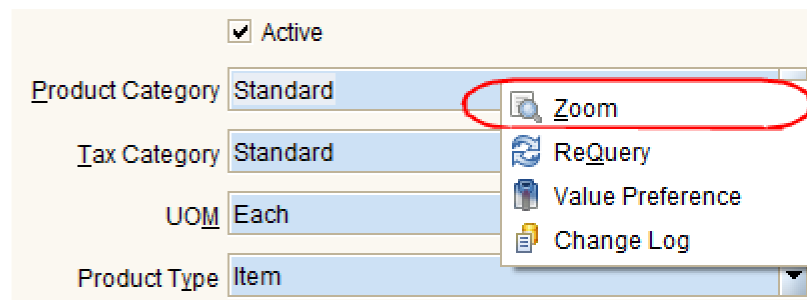
- From menu, open Sales Order window
  - Expand Quote-to-Invoices > Sales Orders > Sales Order
  - On Sales Order window, click on **History Icon** and select view **All**
  - You will see all sample sales order. Try navigate through records and Sales Order Line tab and see relation of master-detail data.
- Use Lookup to find Product Window
  - Type “Product” into Lookup field on the bottom-right of the Menu window.
  - Push Enter button until you find the Product window. Click Product window to open it.
  - On Lookup Record, search for Name = Fertilizer
  - Click on Toggle Button to see information in grid mode and expanded mode.

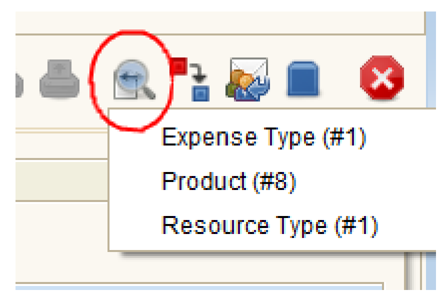


Explore ADempiere

- Create new Product
  - Click on **New** icon on Tools Bar to create new Product
    - **Search Key:** MyTestProduct
    - **Name:** MyTestProduct
  - Click on **Save** icon on Tools Bar
- Work on Context Menu
  - With MyTestProduct record,
  - Right click on the **Product Category** field to open Context Menu
  - Click **Zoom**, the **Product Category** window will open.
- Work on Zoom Across
  - On **Product Category** window, click **Zoom Across** icon on Tools Bar
  - You will see how this data is use else where, try clicking on it.

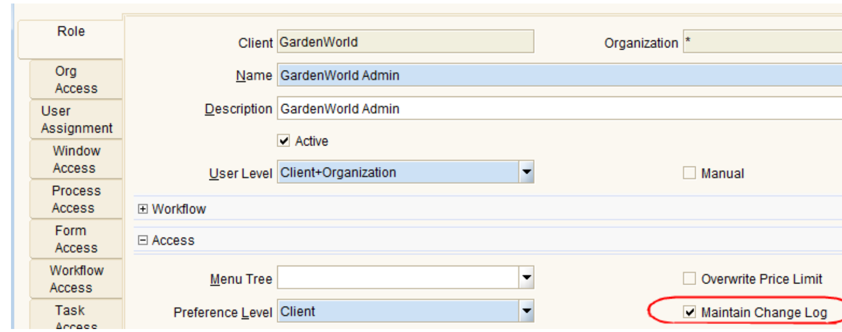


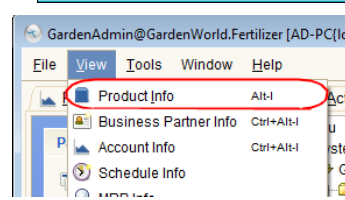


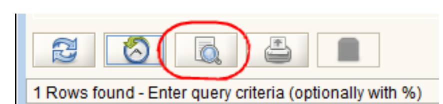


Explore ADempiere

- Enable Change Log for GardenWorld
  - Open **Role** window
  - Lookup for **GardenWorld Admin** role
  - Click on **Maintain Change Log** checkbox and **Save** the record
- View Change History
  - Go back to MyTestProduct record on Product Window.
  - Try changing information of this Product window, and **Save** the record.
  - Click on Record Info at the bottom right of the window,
  - Notice on the Record ID and the **change history**.
- Explore Product Info form
  - On the Menu window, click View > **Product Info**
  - Product Info Form will open, try search for the product **MyTestProduct**
  - With **MyTestProduct** selected, click Zoom icon at the bottom of the form to go to Product window.







Test Your Knowledge

1. What are login modes available in ADempiere?
2. What are the system provided Logins?
3. ADempiere support multi-site, multi-org, multi-warehouse, multi-currency, multi-language?
4. How to setup Audit Trail for data in ADempeire?
5. What is different between **Zoom** and **Zoom Across**?
6. What is History button? 

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