



Module 3

ADempiere Basics

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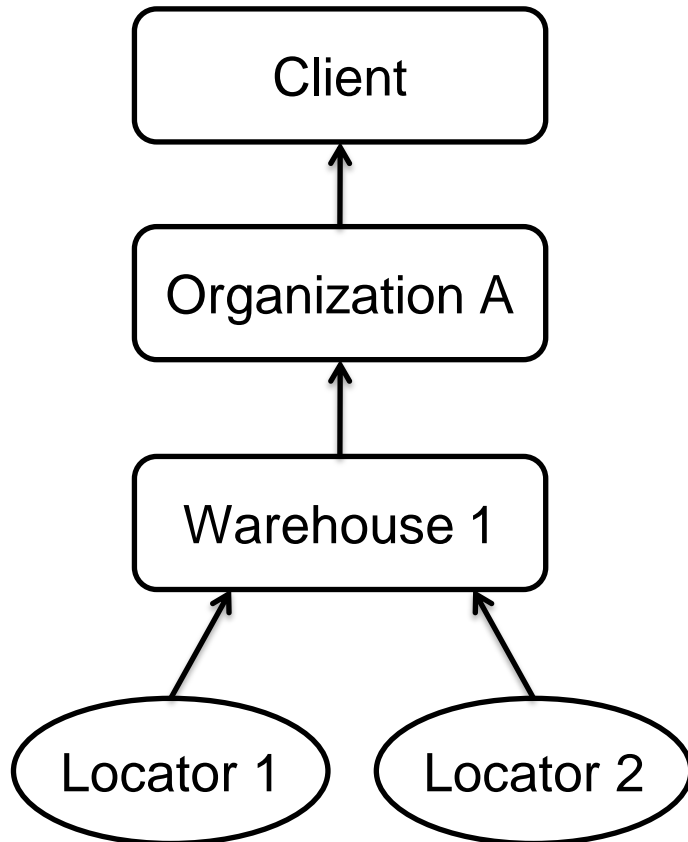
Module Objectives



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

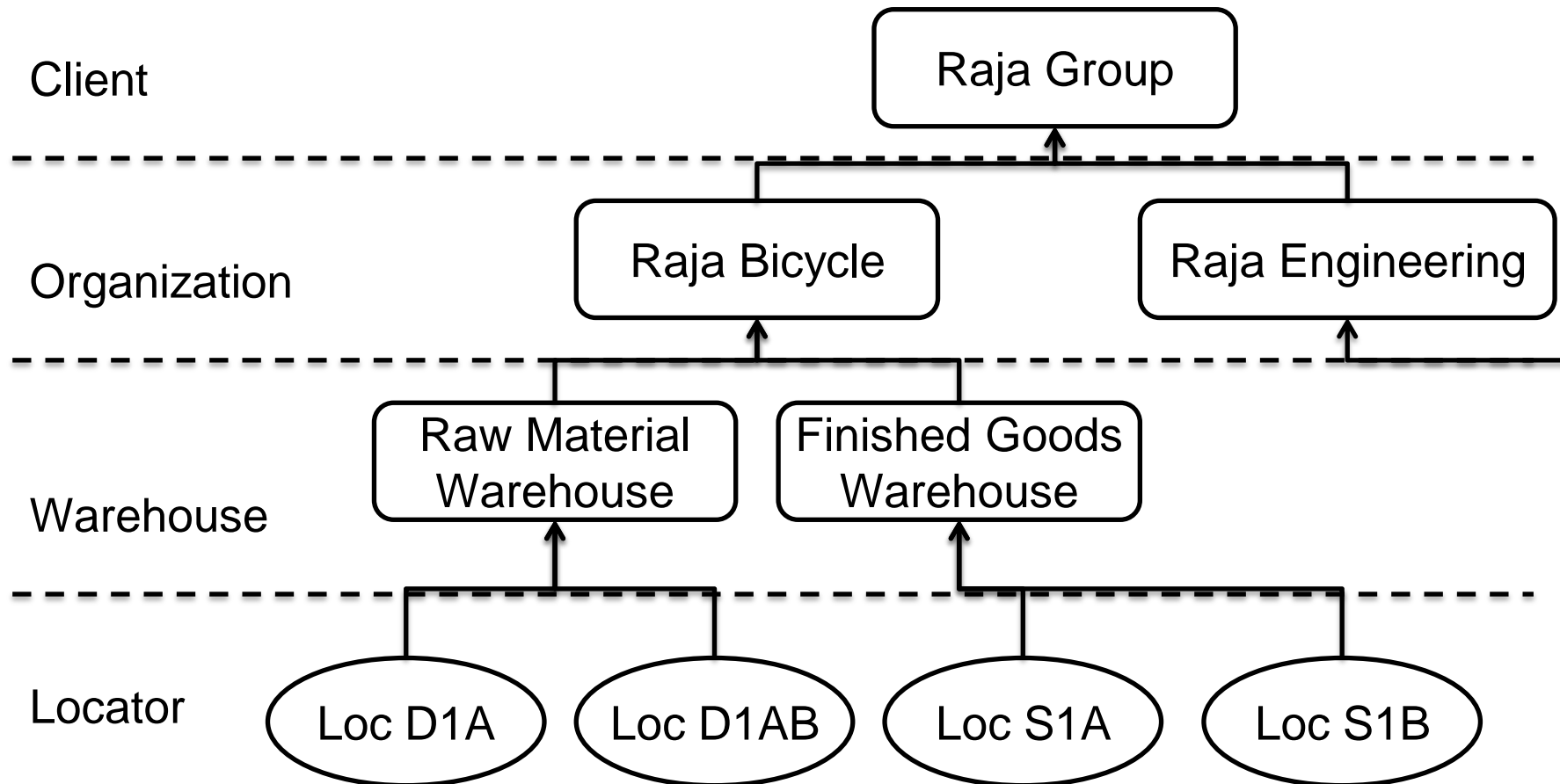


How Organization Structure fit into ADempiere



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

Sample Organization

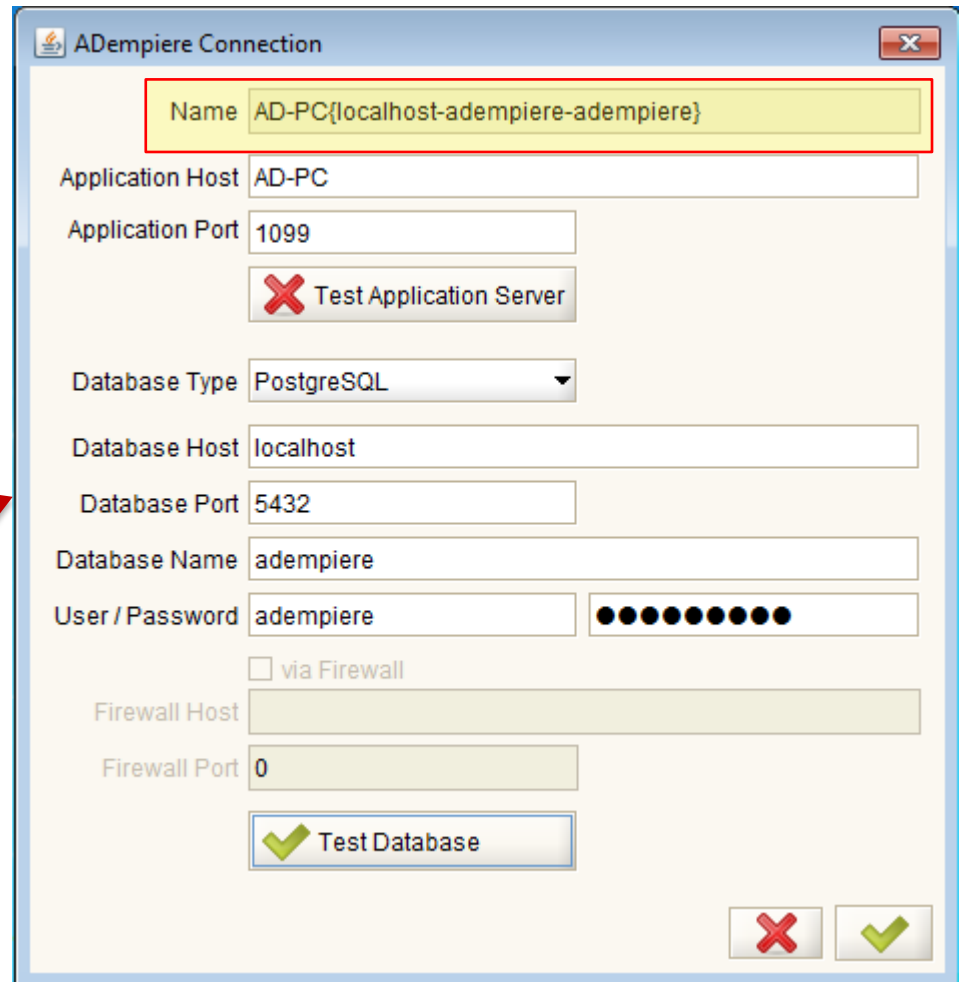
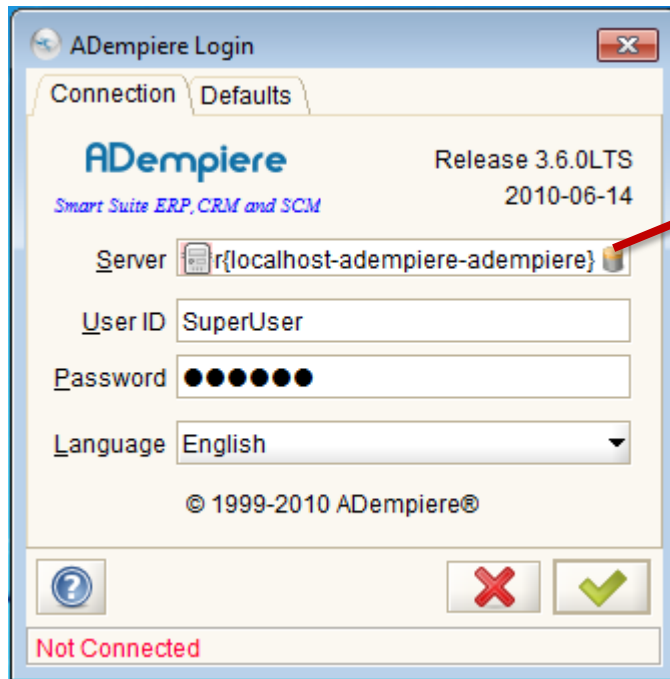


Login Screen



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

A screenshot of a Windows-style dialog box titled "AD-PC{localhost-adempiere-adempiere}". The dialog has two tabs: "Connection" and "Defaults", with "Defaults" selected. It contains several fields:

- Role**: A dropdown menu with "GardenWorld Admin" selected.
- Client**: A dropdown menu with "GardenWorld" selected.
- Organization**: A dropdown menu with "Fertilizer" selected.
- Warehouse**: A dropdown menu with "Fertilizer" selected.
- Date**: A text field containing "03/03/2011" and a calendar icon to its right.
- Printer**: A dropdown menu with "Microsoft XPS Document Writer" selected.

At the bottom of the dialog, there is a help icon (question mark in a circle), a red "X" button, and a green checkmark button. Below these buttons is a status bar that says "Authorized".

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

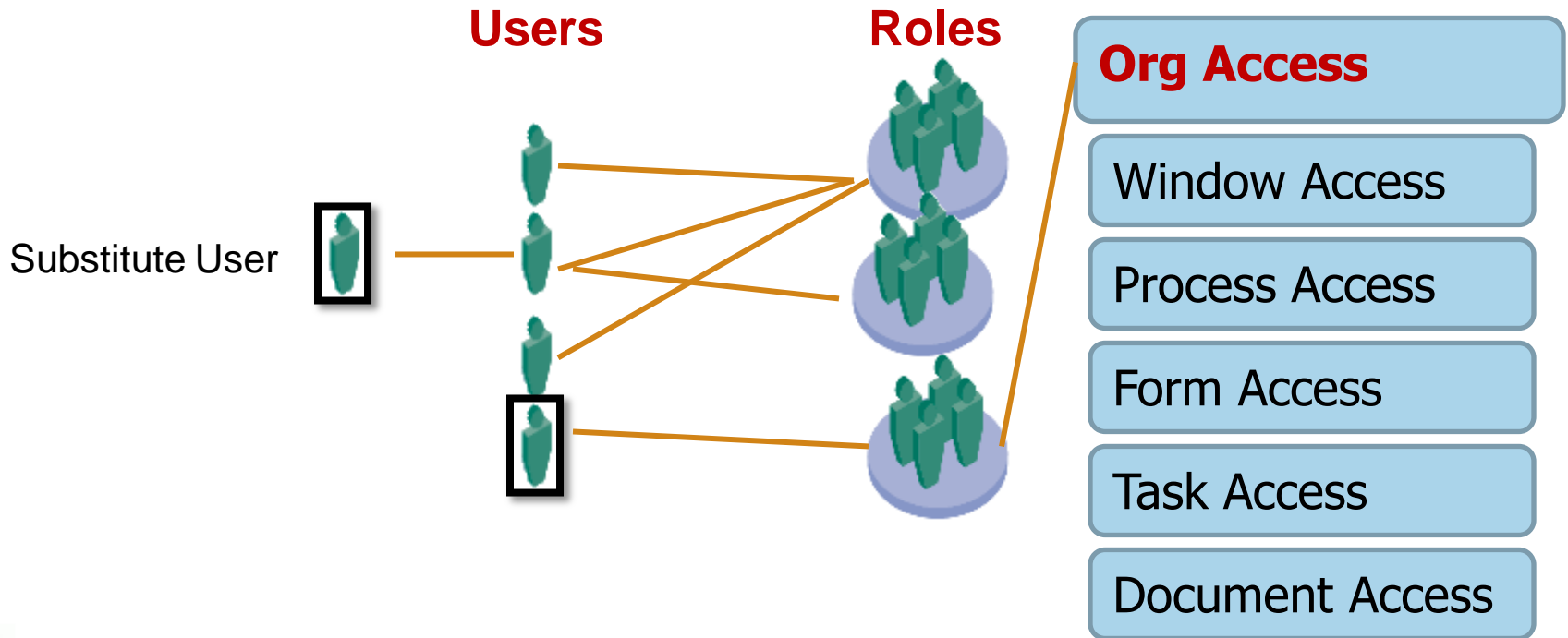


With the **Application Dictionary**, you can perform low-level configuration, such as:

- ✓ 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

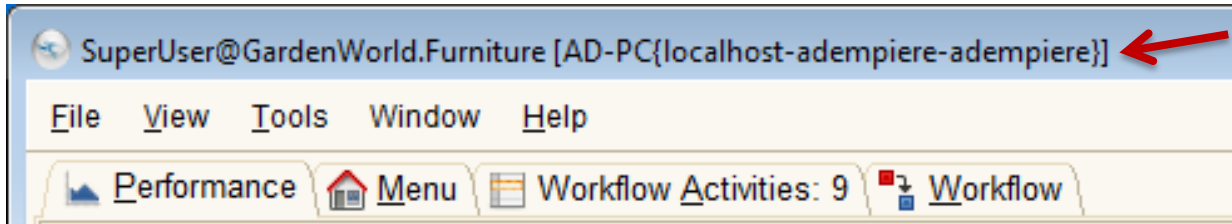


All security setting are defined in Role

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}]*

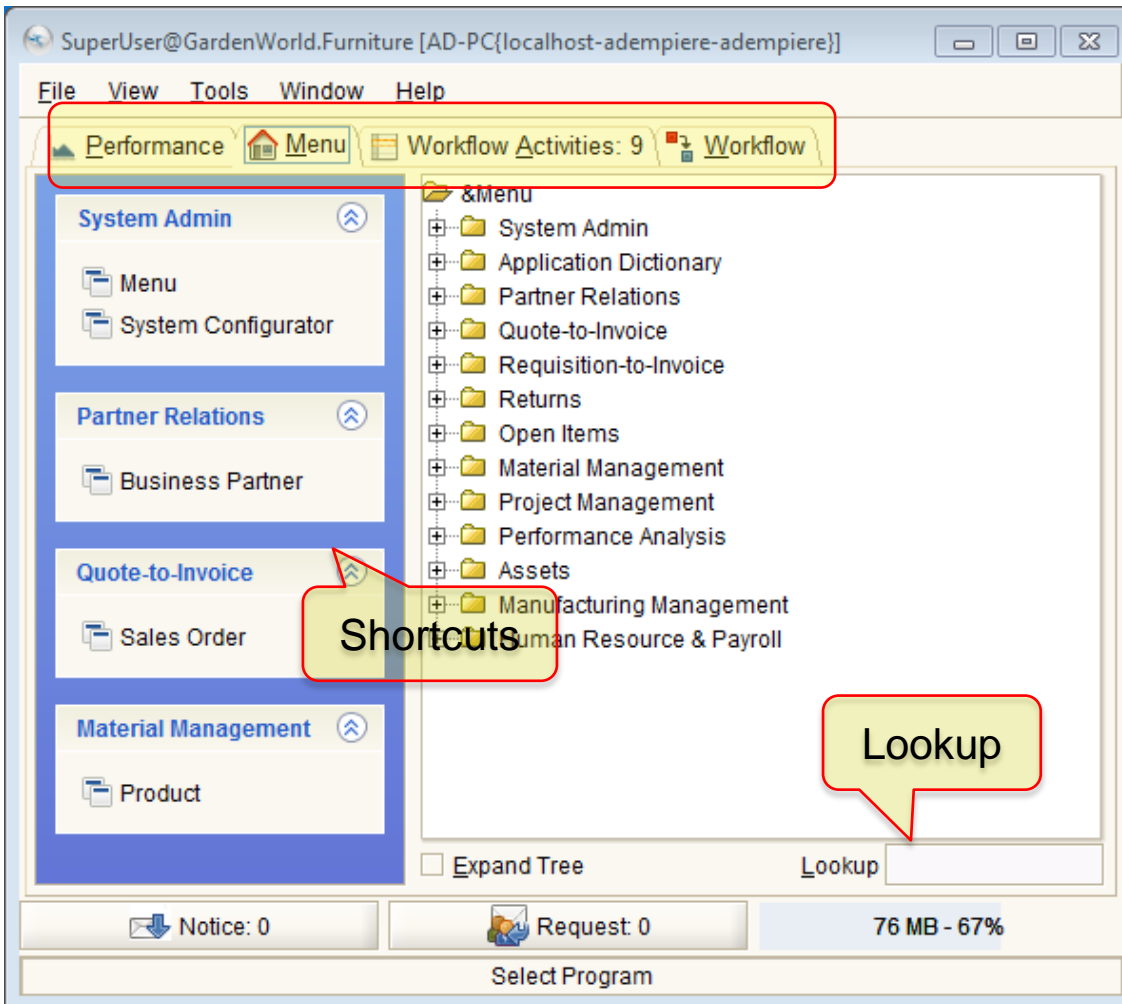
For Example

- Login User = SuperUser
- Client = GargenWorld
- Warehouse = Furniture
- Server ID = AD-PC
- DB Server = localhost
- DB Name = adempiere
- DB User = adempaire



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



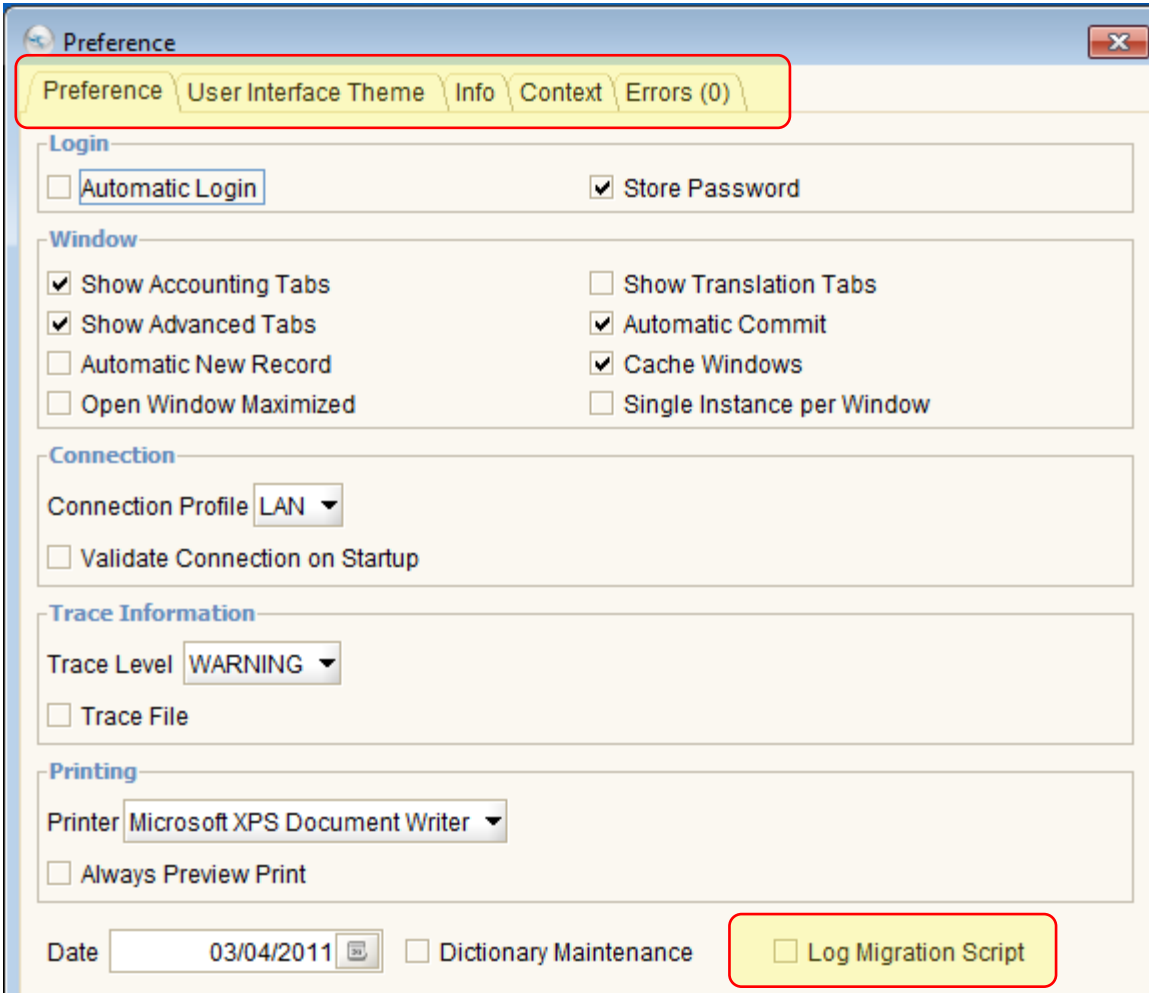
4 Main Tabs

- 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

Preference User Interface Theme Info Context Errors (0)

Login

Automatic Login Store Password

Window

Show Accounting Tabs Show Translation Tabs
 Show Advanced Tabs Automatic Commit
 Automatic New Record Cache Windows
 Open Window Maximized Single Instance per Window

Connection

Connection Profile LAN Validate Connection on Startup

Trace Information

Trace Level WARNING Trace File

Printing





Printer Microsoft XPS Document Writer Always Preview Print

Date 03/04/2011 Dictionary Maintenance Log Migration Script

- 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

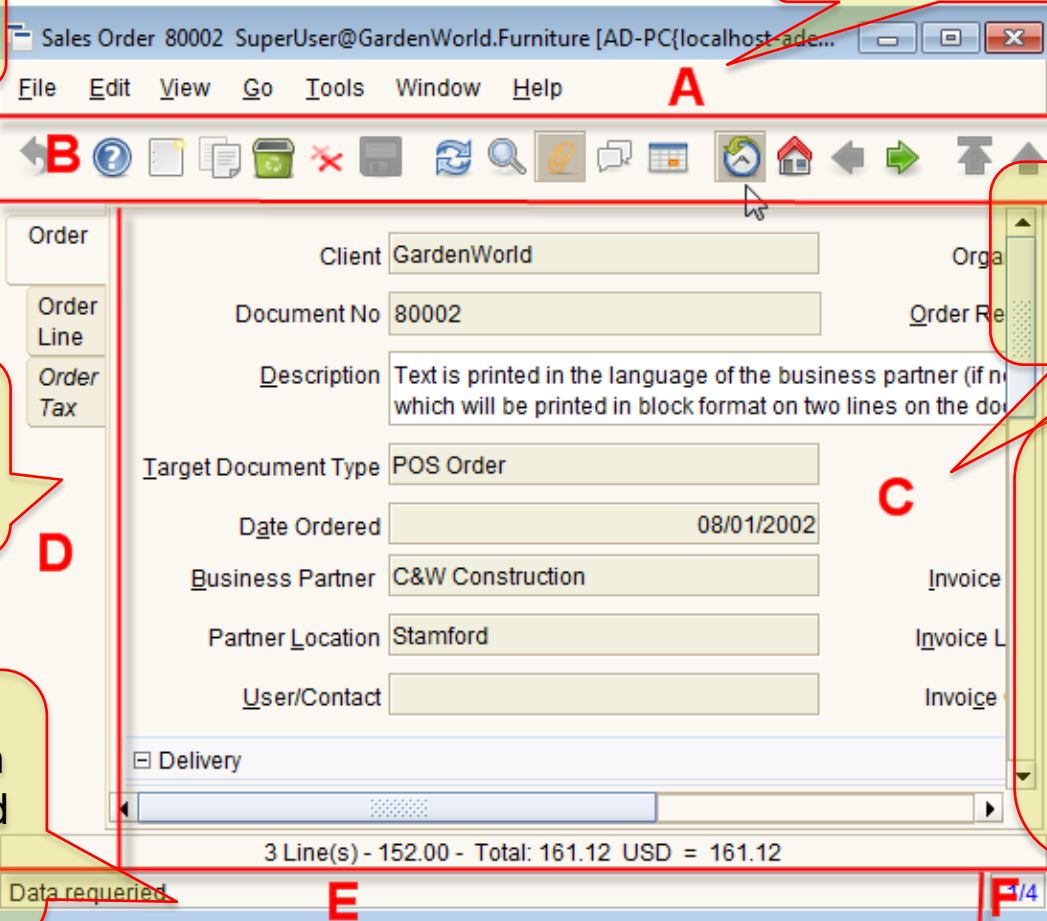


Icon	Description
	Normal ADempiere Window or Form: This window is used for managing records, entering records, or viewing our transactions (for example, Purchase Order, Sales Order, and Accounting Fact Balances), etc.
	Process: This performs tasks or jobs that could be done in the database (for example, 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



File Edit View Go Tools Window Help

Order Client GardenWorld Orga

Order Line Document No 80002 Order Re

Order Tax Description Text is printed in the language of the business partner (if n which will be printed in block format on two lines on the do

Target Document Type POS Order

Date Ordered 08/01/2002

Business Partner C&W Construction Invoice

Partner Location Stamford Invoice L

User/Contact Invoice

Delivery

3 Line(s) - 152.00 - Total: 161.12 USD = 161.12

Data requiered

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,

Record Info 1/4 - Order

Created By: SuperUser - Aug 25, 2002 12:25:26 AM ICT
Updated By: SuperUser - Mar 4, 2011 12:21:20 PM ICT

(C_Order - C_Order_ID=102)

&Name	New Value	Old Value	Updated By	Updated	Column
Sales Representative	GardenAdmin	GardenUser	SuperUser	Mar 4, 2011 12:21:25 PM ICT	SalesRep_ID
Sales Representative	GardenUser	GardenAdmin	SuperUser	Mar 4, 2011 12:21:20 PM ICT	SalesRep_ID

✓

- 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

A screenshot of a software window titled 'Access'. It contains several controls: a 'Menu Tree' dropdown menu, a 'Preference Level' dropdown menu set to 'Client', a checked 'Show Accounting' checkbox, an unchecked 'Overwrite Price Limit' checkbox, a checked 'Maintain Change Log' checkbox (highlighted with a red border), and an unchecked 'Access all Orgs' checkbox.

2. By Table

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

A screenshot of a software window showing table and column settings. It includes a checked 'Active' checkbox, an unchecked 'View' checkbox, a 'Data Access Level' dropdown set to 'Organization', a 'Window' dropdown set to 'Sales Order', a 'PO Window' dropdown set to 'Purchase Order', and a checked 'Maintain Change Log' checkbox (highlighted with a red border).

Data Types in ADempiere



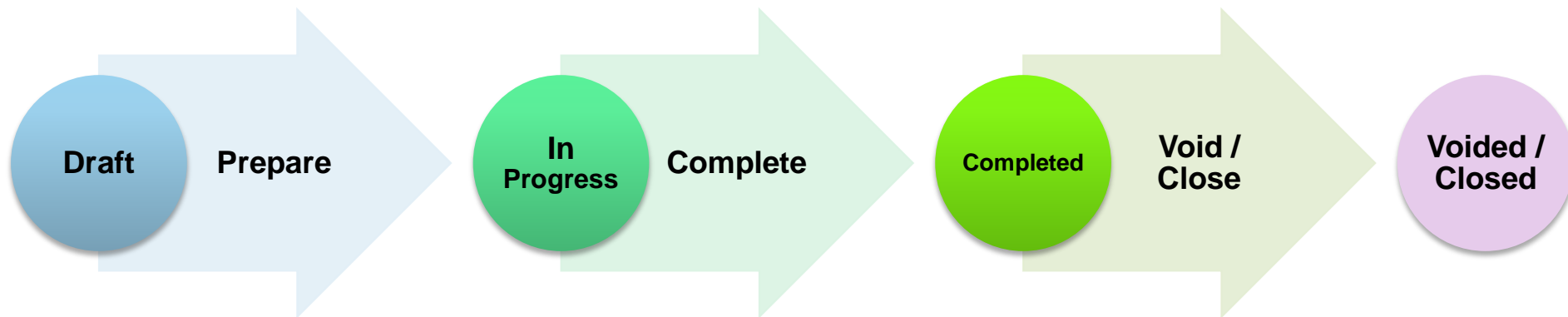
1. Master Data

- 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.	<i>F2</i>
	Save: After you finish entering or updating your data, click on this button to save the information to the database.	<i>F4</i>
	Cancel: Use this button to cancel or ignore your changes.	<i>Esc</i>
	Copy Record: Duplicate the value of existing records to new records.	<i>Shift + F2</i>
	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.	<i>F3</i>
	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.	<i>Ctrl + D</i>
	ReQuery: Get the latest data, for the active records, from the databases.	<i>F5</i>
	Grid Toggle: Show detailed information of one record only. This is suitable for adding (entering) or editing data.	<i>F8</i>
	Grid Toggle: Shows the list of data or records in a grid mode.	<i>F8</i>

Icon	Description	Shortcut
	First record: Go to the first record in a document.	<i>Alt + Page Up</i>
	Previous record: Go to the previous record in a document.	<i>Alt + Up</i>
	Next record: Go to the next record in a document.	<i>Alt + Down</i>
	Last record: Go to the last record in a document.	<i>Alt + Page Down</i>
	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.	<i>Alt + Right</i>
	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.	<i>Alt + Left</i>
	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.	<i>F9</i>
	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.	<i>F6</i>


Other Tasks



Icon	Description	Shortcut	Icon	Description	Shortcut
	Report in columnar format: With a master detail data, we shall print the header information only with this printing feature.	<i>F11</i>		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.	
	Print Preview: This will preview a document. It is suitable for the purpose of checking.	<i>Alt + Shift + P</i>		Help: Information about the purpose of the window and the meaning of each field.	
	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.	<i>F12</i>		Exit window: Close the window, and go to the main menu.	<i>Alt + X</i>
	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.	<i>F7</i>			
	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.				

Search for Data in Standard Window



- Lookup 
 - To screen only the required data

Basic

Lookup Record: Product

Lookup Record Advanced

Key %

Name %

Description %

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Advanced

Lookup Record: Product

Lookup Record Advanced

And/...	(Column	Oper...	Query Value	To Query Val...
			=		

Active

Attribute Se

Attribute Se

Bill of Mater

Classificati

Client

Comment/t

Company A

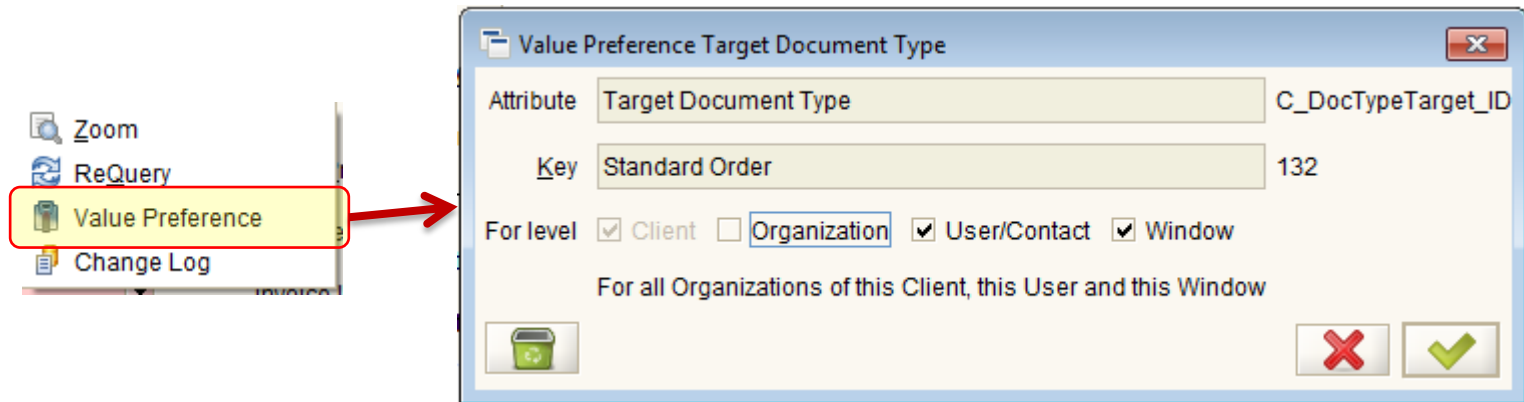
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Value Preferences



- 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.



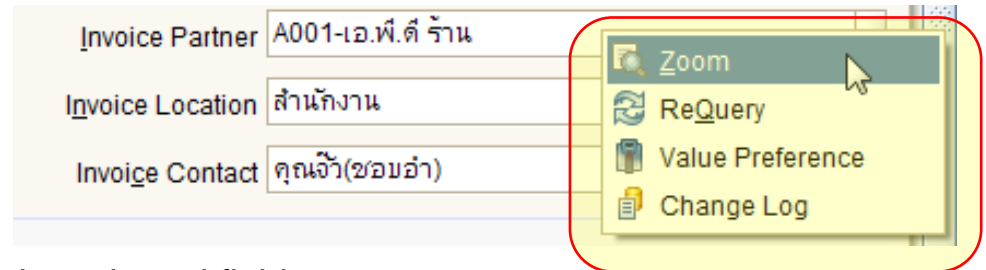
For example, open a Sales Order window and point your mouse to the Document Type field, and then pick Document Type from the list. We can make Standard Order as default values a default value by right-clicking and selecting the Value Preference menu, and then selecting the Organization checkbox, User/Contact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

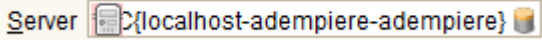


hands
on

The text "hands on" is displayed in a black, sans-serif font. The word "hands" is on the top line, and "on" is on the bottom line. The letters are surrounded by several blue handprints of varying sizes and orientations, creating a graphic effect. The handprints are scattered around the text, with some overlapping the letters.

Explore ADempiere

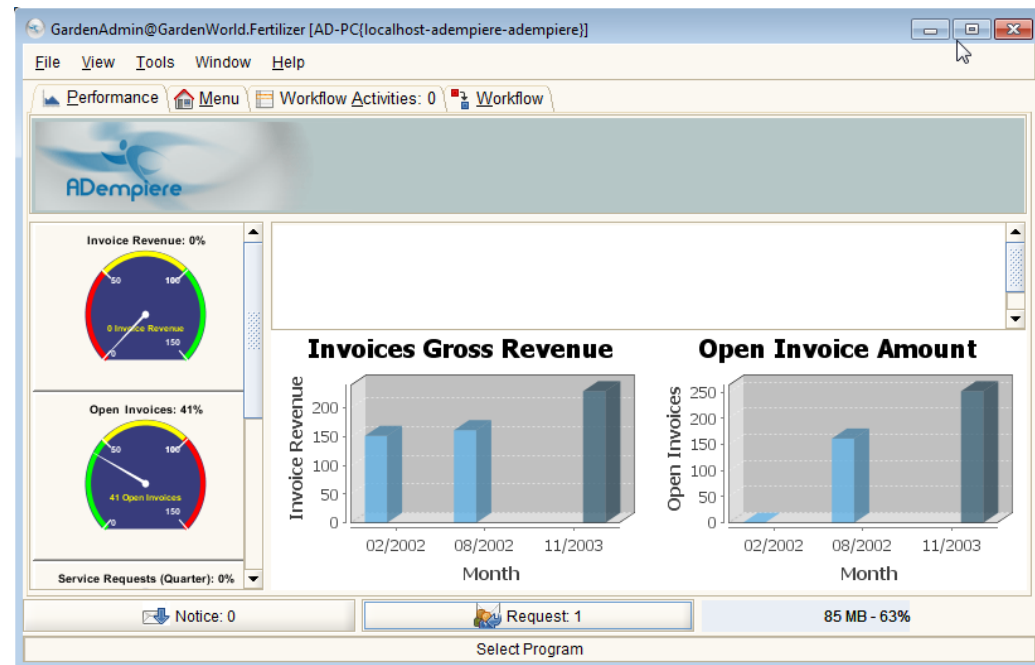


- Navigate to C:\ADempiere\Utils, execute Run_Server2.bat to start server
- Open ADempiere Client and test Server Connection
 - Click on Server Connection 
 - Click on Test Application Server and Test Database button. See if everything is running properly.

- 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.

The screenshot displays the ADempiere software interface. The top window shows the 'Menu' window with a tree view of the system structure. The 'Sales Order' window is open, showing a list of sales orders. A 'Lookup Record: Product' window is open, showing a search for 'Fertilizer'. The 'Product' window is open, showing details for 'Lawn Fertilizer'.

The 'Lookup Record: Product' window shows the following fields:

Field	Value
Key	%Fertilizer
Name	%
Description	%

The 'Product' window shows the following details:

Field	Value
Client	GardenWorld
Organization	*
Search Key	Fertilizer
Version No	
Name	Lawn Fertilizer
Description	
Comment/Help	
Document Note	

Explore ADempiere



- Create new Product

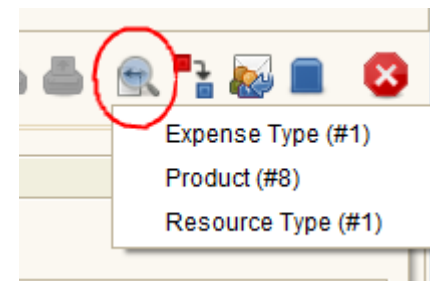
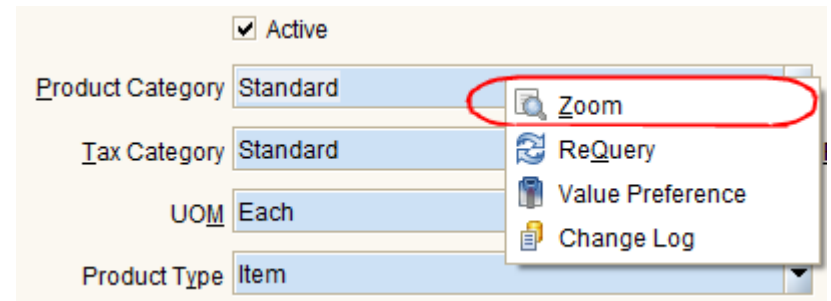
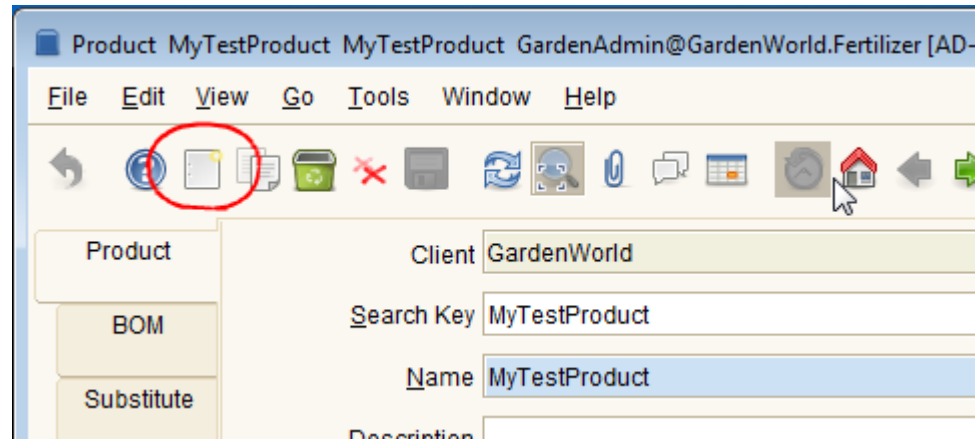
- Click on **New** icon on Tools Bar to create new Product
 - **Search Key:** MyTestProduct
 - **Name:** MyTestProduct
- Click on **Save** icon on Tools Bar

- 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.

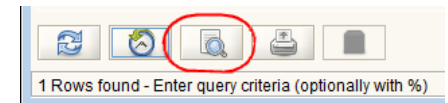
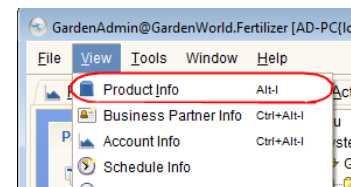
Role configuration window for GardenWorld Admin. The 'Maintain Change Log' checkbox is checked and circled in red.

Record Info [1/1] - Product

Created By: GardenAdmin - Mar 4, 2011 2:28:20 PM ICT
Updated By: GardenAdmin - Mar 4, 2011 2:46:49 PM ICT


(M_Product - M_Product_ID=1000000)

&Name	New Value	Old Value	Updated By	Updated
Description	Description		GardenAdmin	Mar 4, 2011 2:47:01 PM ICT
Product Category	Raw Material	Standard	GardenAdmin	Mar 4, 2011 2:46:49 PM ICT
Product	1000000		GardenAdmin	Mar 4, 2011 2:28:20 PM ICT



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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