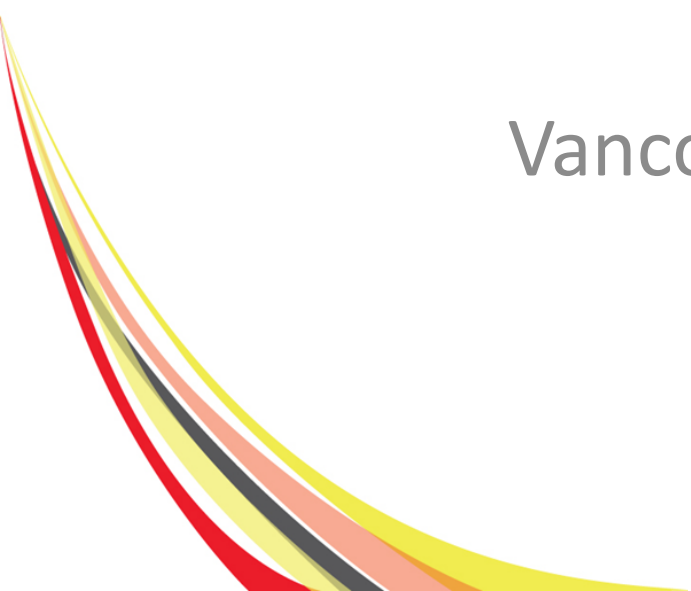




OFBiz Configuration Only (Or Look No Code!)

Sharan Foga

Vancouver: 13th May 2016



Agenda



- Introduction
 - Who Am I?
 - What is OFBiz?
- Functional Configuration
 - What is it?
 - Configuration Levels
- Configuration Examples
- Summary
- Questions / Comments

INTRODUCTION

Who am I?

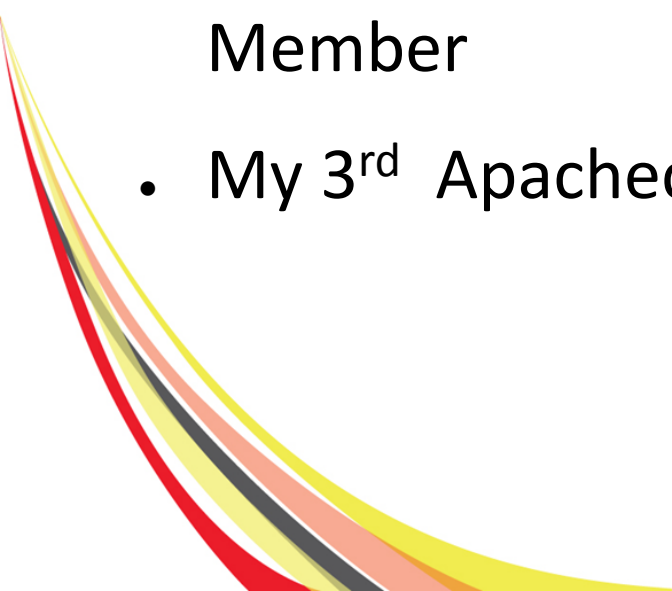
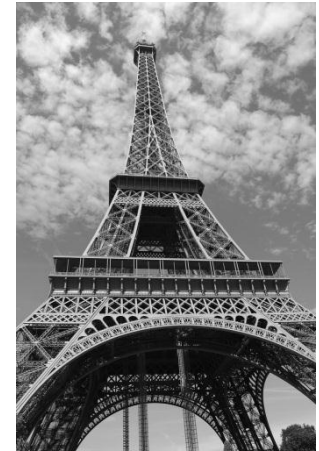
What is Apache OFBiz?



Who am I?



- Project Manager / ERP Consultant / Author
- Enjoy travelling
- Involved with OFBiz since 2008
- Committer, PMC & ASF Member
- My 3rd Apachecon



What is Apache OFBiz?



- OFBiz
 - “Open For Business” (OFBiz)

- Definitions
 - It’s a framework to build business applications
 - It’s an Open Source ERP and E-Commerce application

OFBiz – Technical Overview

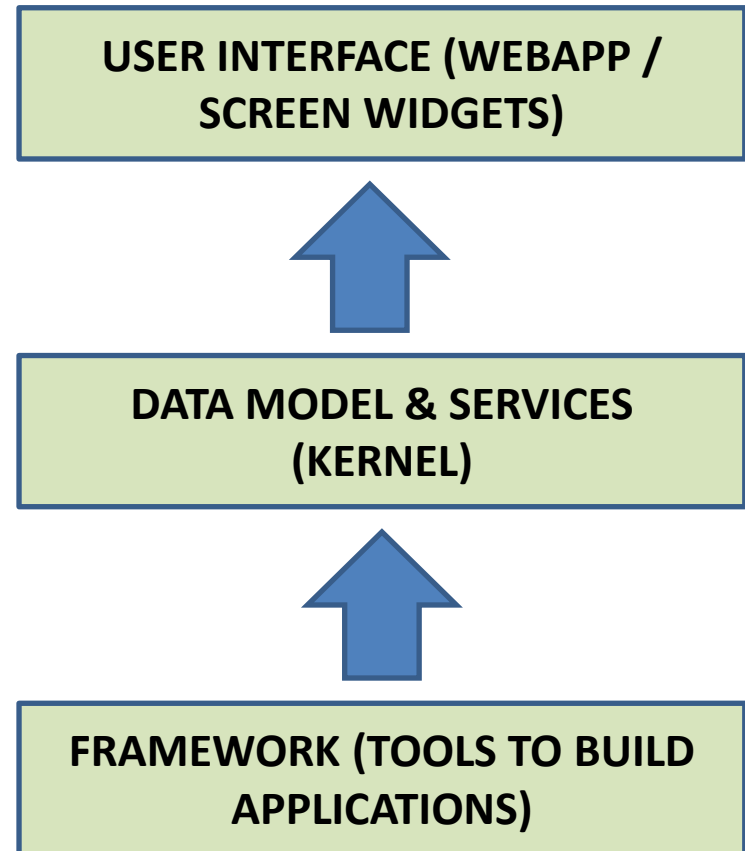


- Structure

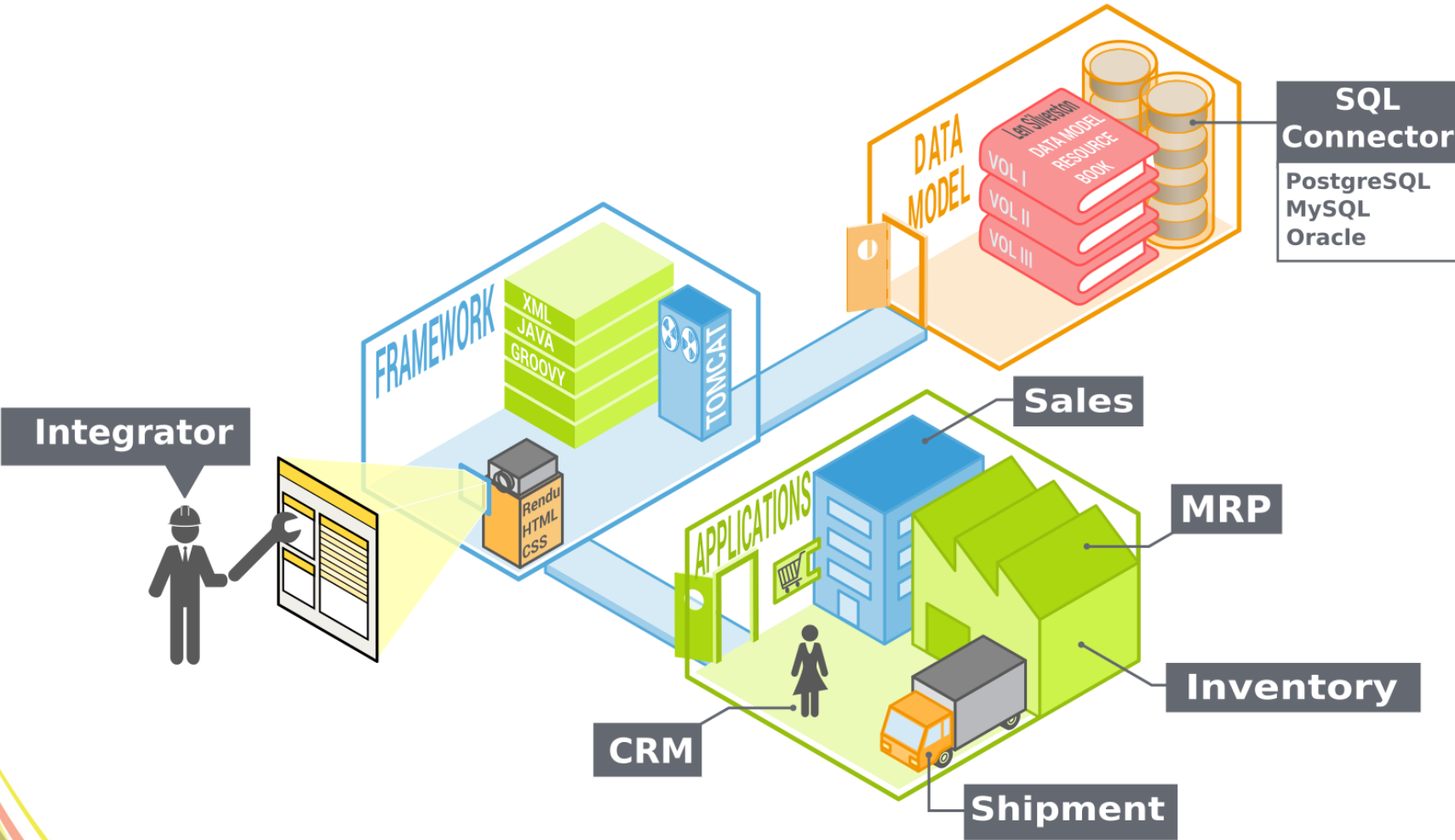
- Data Model
- Services
- Applications

- Technical Base

- Java, Javascript
- XML, Tomcat, Derby
- Groovy, Freemarker



OFBiz Business Overview



From the Noun Project : Client created by chris dawson, Roue de camion created by Luis Prado, clé à molette created by Andy Fuchs, Worker created by Mundo, Book Created by Dmitry Baranovskiy.
Jarticul.com : Cylindre SQL



OFBiz Users Types



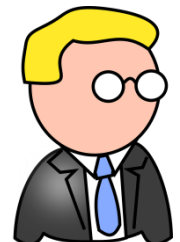
- Developers

- Technical
- Used to tools
- Understand structure and flow of OFBiz



- End Users

- Business Focus
- Processes
- Non-Developers
- Installing can be a major achievement



FUNCTIONAL CONFIGURATION

What is it?

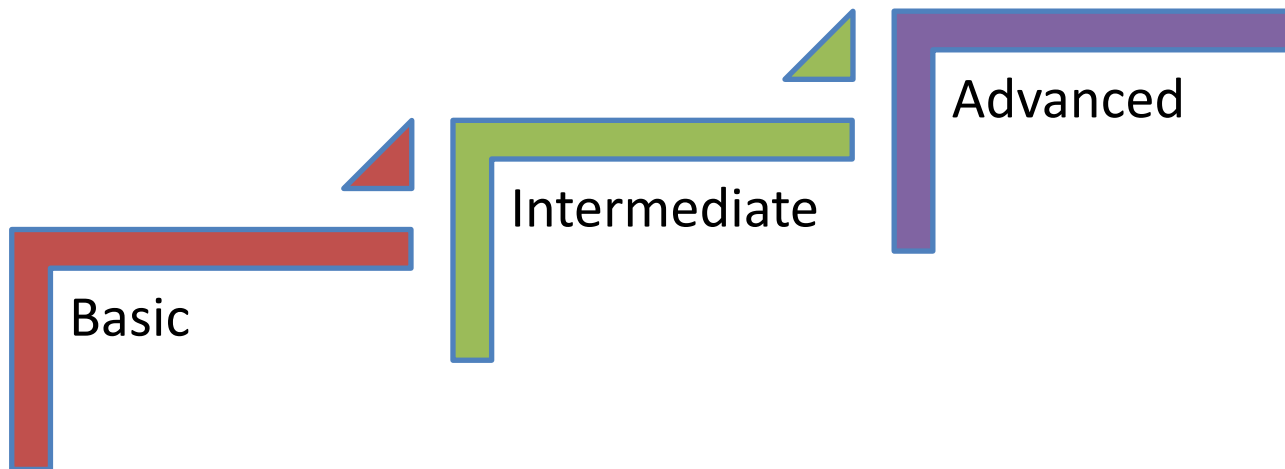
What are the levels?



Functional Configuration



- What is it?
 - Tailoring a system using configurable parameters
- Benefits
 - Builds user engagement and system knowledge
 - Upgradeability



Basic - Look and Feel



- User Preferences
 - Language Settings
 - Themes
 - User Profile



- System View
 - Menu Structure
 - Roles



Basic - Themes



Accounting | Accounting - AP | Accounting - AR | Asset Maint | Catalog | Content | Facility | HR | Manufacturing +

Main | Invoices | Payments | Payment Group | Transactions | Payment Gateway Config | Billing Accounts | Financial Account | Tax Authorities | Agreements | Fixed Assets | Budgets | Global GL Settings | Organization GL Settings

Accounting Manager Main Page

Agreements
List Available Agreements

Billing Accounts
Show Customer Billing Account

Fixed Assets
Show All Fixed Assets

ofbiz The Apache Open for Business Project
2016-04-09 11:05 New task assignment
2016-04-09 11:05 New task assignment

Applications Accounting Manager

Accounting Manager Main Page

Agreements
List Available Agreements

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APPLICATIONS PREFERENCES WE

ACCOUNTING MANAGER

MAIN
INVOICES
PAYMENTS
PAYMENT GROUP
TRANSACTIONS
PAYMENT GATEWAY CONFIG
BILLING ACCOUNTS

Accounting Manager Main Page

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Show All Fixed Assets

Basic - Languages



Cpt. générale Cpt. fourn. Cpt. clients Maintenance Catalogues Contenu Entreposage Ress. hum. Fabrication +

Page d'accueil Factures Paiements Groupe de paiement Transactions Configuration de la passerelle de paiement Comptes de facturation Compte financier Administrations fiscales Accords commerciaux Actifs immobilisés Budgets

THE ADMINISTRATOR FR

Chartes graphiques

Déconnexion

Page d'accueil de la comptabilité

Accords commerciaux
Liste des accords commerciaux disponibles

Comptes de facturation
Montrer Client Compte de facturation

Actifs immobilisés
Afficher toutes les immobilisations

Factures
Afficher toutes les factures Afficher les factures Commission Afficher les factures Approuvées

- User View

- MyPortal
- Tailor your view

Accounting Accounting - AP Accounting - AR Asset Maint Catalog Content Facility HR Manufacturing +

Main My Comms My Profile Other Party Comms My Time Sheet My Tasks My Leave My trainings My Payments Preferences Portal pa

Incoming customer requests

Cust Request Id	Cust Request Type Id	Product Store Id	Cust Request Name	Priority	Cust Request Date	Response Required Date
9000	Request For Support	OFBiz E-Commerce Store [9000]	Customer Request Usage	9	2008-07-28 09:45:31.928	
9001	Request For Support	OFBiz E-Commerce Store [9000]	Hardware?	9	2008-07-21 11:45:31.928	
9002	Request For Support	OFBiz E-Commerce Store [9000]	Customer Same company	9	2008-07-19 18:45:31.928	

Communications of party: [admin]

Emails from UN-known origin

Subject	Entry Date	Note
Why I would use the OFBiz system	7/28/08	Sent from: my@email.com; Sent Name from: Jo Easy User; Sent to: ofbiztest@example.com; Delivered-To: ofbiztest@exa

Subject	Comm.Type Id	Party Id From	Party Id To	Status ID
---------	--------------	---------------	-------------	-----------

Basic – Application View



- Application Screens

- Screen Labels
- Error Messages

Search Results

Row n.	Key	File Name	References	العربية	čeština	Dansk	Deutsch	English	English (United Kingdom)	español	français
1	EcommerceAboutUs	EcommerceUiLabels.xml	References					About Us			A propos
2	EcommerceAccountInformation	EcommerceUiLabels.xml	References			Konto information		Account Information			Information sur le compte
3	EcommerceAccountLogin	EcommerceUiLabels.xml	References			Deres konto login er:	Ihre Benutzeranmeldung ist:	Your account login is:		Usuario	Votre identifiant est :
4	EcommerceActive	EcommerceUiLabels.xml	References	Váš E-mail		Aktiv	Aktiv	Active		Activo	Actif
5	EcommerceAddChildListsToCart	EcommerceUiLabels.xml	References	Přidejte tento seznam a další seznam(-y) do košíku.		Læg denne liste samt underliste(r) i indkøbskurven	Fügen Sie diese Liste mit Unterliste(n) zum Warenkorb hinzu	Add This List And Child List(s) To Cart	Add This List And Child List(s) To basket	Añadir listas hijas al carro	Ajouter la liste et sous liste(s) au panier

Intermediate – Application Security



- Security and Application Access
 - Security Groups
 - User IDs

The screenshot shows the 'Find Security Group' page in the ofbiz application. The page has a navigation menu at the top with tabs for Main, Parties, My Communications, Communications, Visits, Logged-in Users, Classifications, Security, and Address Ma. Below the menu, there are links for 'Find Security Group' and 'Cert Issuers'. The main content area is titled 'Find Security Group' and includes a 'Create New' button. A pagination bar shows 'Page 1' and '20' items per page. The table below lists various security groups with their IDs and descriptions.

Security Group ID	Description
ACCTG_FUNCNL_ADMIN	Accounting permission for all accounting functions.
ASSETMAINTADMIN	Asset Maintenance Admin group, has all maintenance permissions.
ASSETMAINTTECH	Asset Maintenance Technician group, has view and update.
BIZADMIN	Full Business Applications permission group, has all business app admin permissions, not technical permissions.
CATALOGADMIN	Catalog Admin group, has all catalog permissions.
CATALOGADMIN_LTD	Limited Catalog Admin group, has limited catalog permissions.
COMPDOCADMIN	CompDoc admin group, all permissions.
CONTENT_USER	Content user group, all limited content permissions.
ECOMMERCE_CUSTOMER	Customer user of ECOMMERCE Limited access to own account
FLEXADMIN	Flexible Admin group, has all granular permissions.
FULLADMIN	Full Admin group, has all general permissions.

Intermediate – Application Data

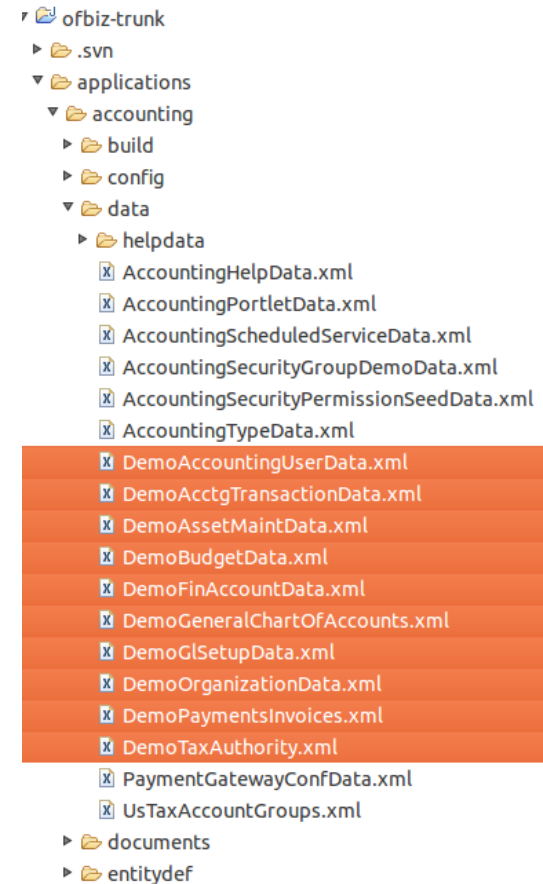


- Data

- Manual Entry
- WebTools XML Import/Export
- Seed & Demo Data

Skill Type Id	Description
9000	Java/Groovy/BSH
9001	Mini Language
9002	HTML/FTL
9003	Javascript/Dojo
9004	Screens/Forms
9005	OFBiz Installation
NA	Not Applicable

Submit



Intermediate – Application Data Mapping

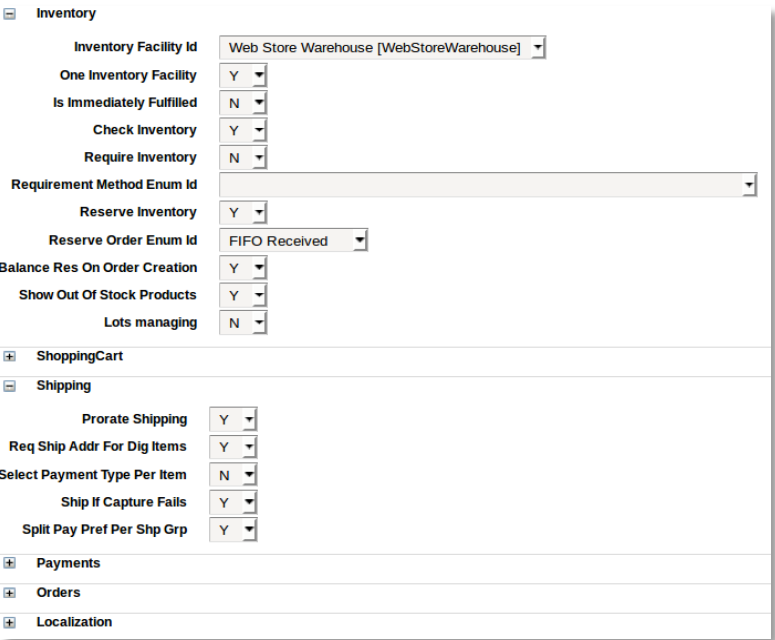
- Data Mapping

 - Data means something by mapping it

Rate Description	Period Type Id	Party ID	Work Effort Id	Empl Position Type Id	Rate Amount
Average Pay Rate	Rate amount per month			Programmer	\$2,000.00
Average Pay Rate	Rate amount per month	Employee Demo			\$2,300.00

- Setting Parameters

 - Control flow and actions



The screenshot shows a configuration interface with several sections:

- Inventory**
 - Inventory Facility Id: Web Store Warehouse [WebStoreWarehouse]
 - One Inventory Facility: Y
 - Is Immediately Fulfilled: N
 - Check Inventory: Y
 - Require Inventory: N
 - Requirement Method Enum Id: (empty)
 - Reserve Inventory: Y
 - Reserve Order Enum Id: FIFO Received
 - Balance Res On Order Creation: Y
 - Show Out Of Stock Products: Y
 - Lots managing: N
- ShoppingCart**
- Shipping**
 - Prorate Shipping: Y
 - Req Ship Addr For Dig Items: Y
 - Select Payment Type Per Item: N
 - Ship If Capture Fails: Y
 - Split Pay Pref Per Shp Grp: Y
- Payments**
- Orders**
- Localization**

Advanced – Application Configuration



• Products

- Finished Good
 - Mobile Phone
- Digital Goods
 - Ebook, Subscription, Gift Card
- Service
 - Consulting, Support, Maintenance
- Virtual & Variant Products
 - Clothing
- Configurable
 - Laptop



Advanced – External Integration



- Pricing and Payments

- Discount Rules
- Payment Methods

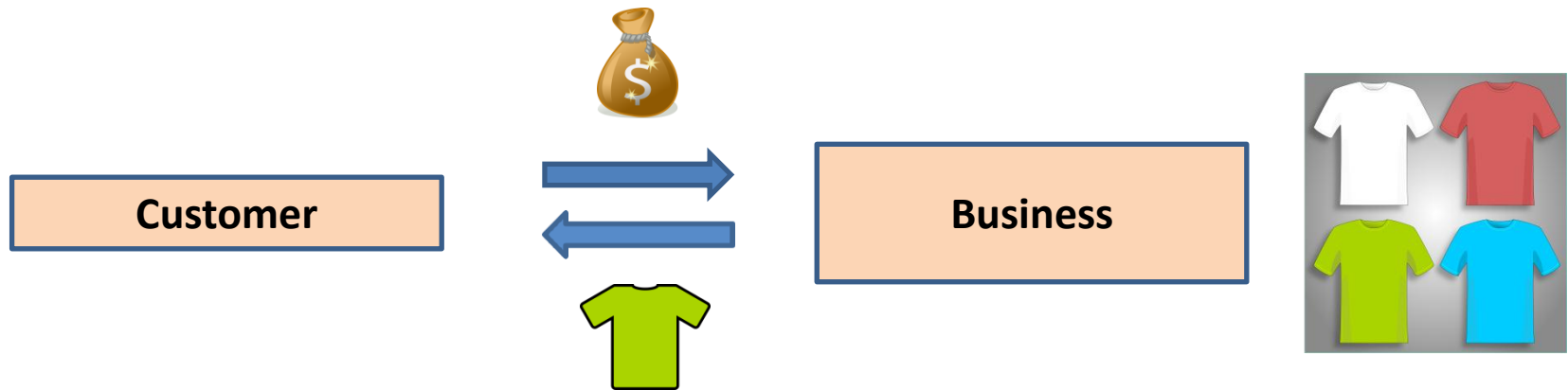


- Integrations

- Google Base / Checkout
- eBay
- Payment Gateways
- Shipping



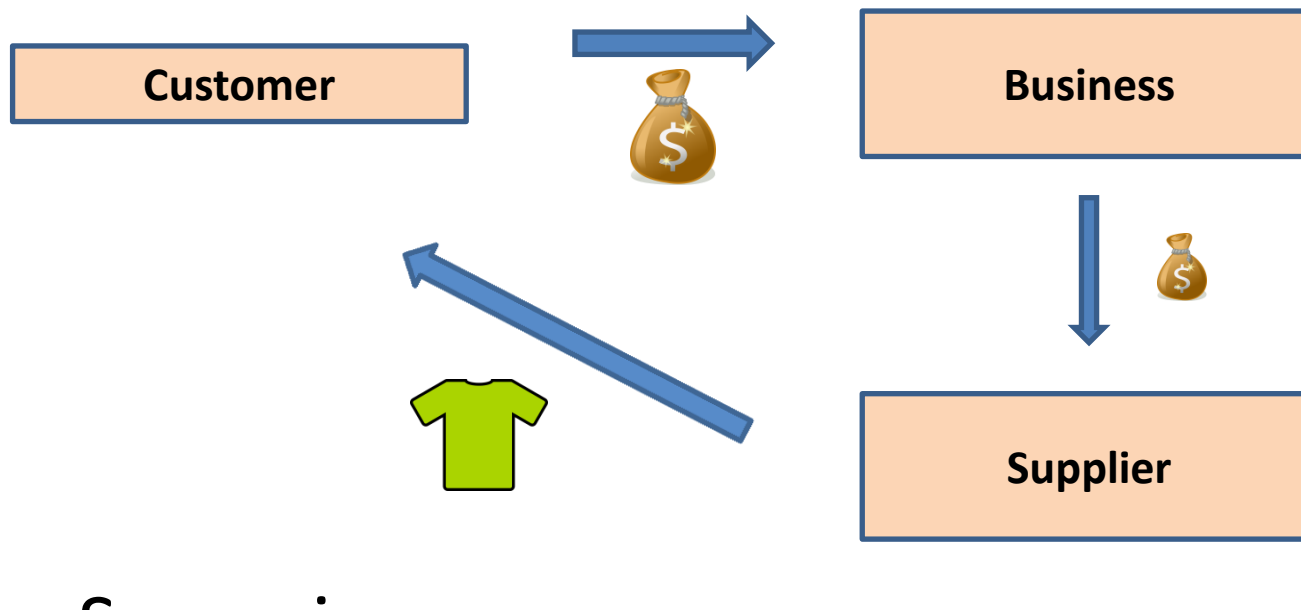
Example - Standard Flow



- Scenario

- Selling T-Shirts
- You manage the stock and delivery to customer

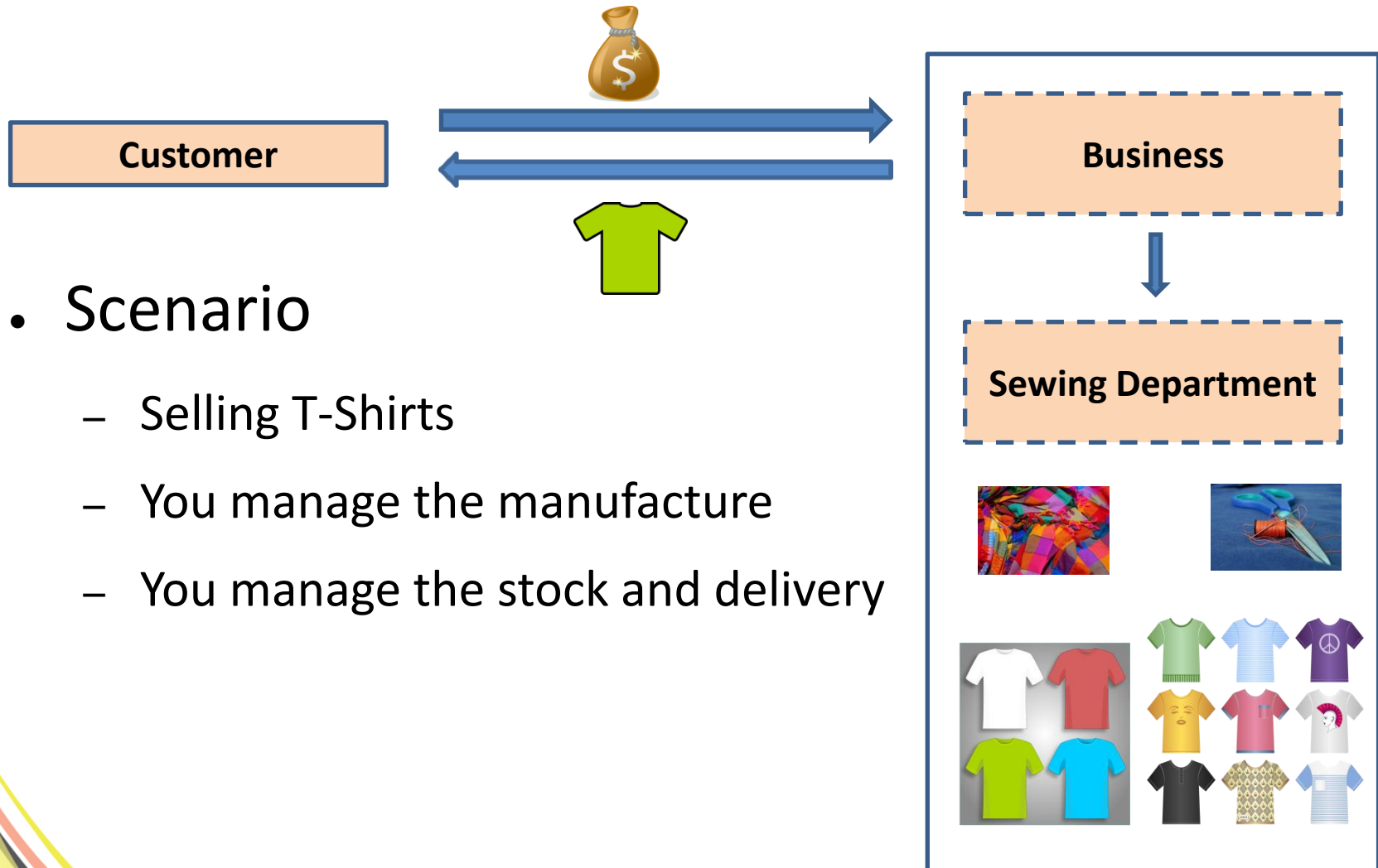
Example - Drop Shipment Flow



- Scenario

- Selling T-Shirts
- Your supplier manages stock and delivery
- You pay the supplier

Example - Manufacturing Flow

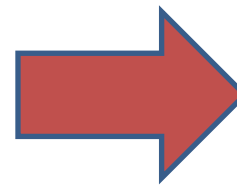
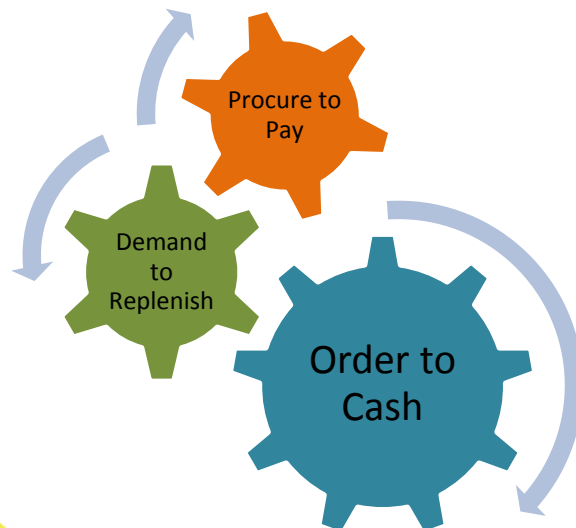


- Scenario

- Selling T-Shirts
- You manage the manufacture
- You manage the stock and delivery

- Creative Thinking

- Mapping a business process or flow to OFBiz
- Understanding the tools available
- Thinking about different ways to achieve what you want

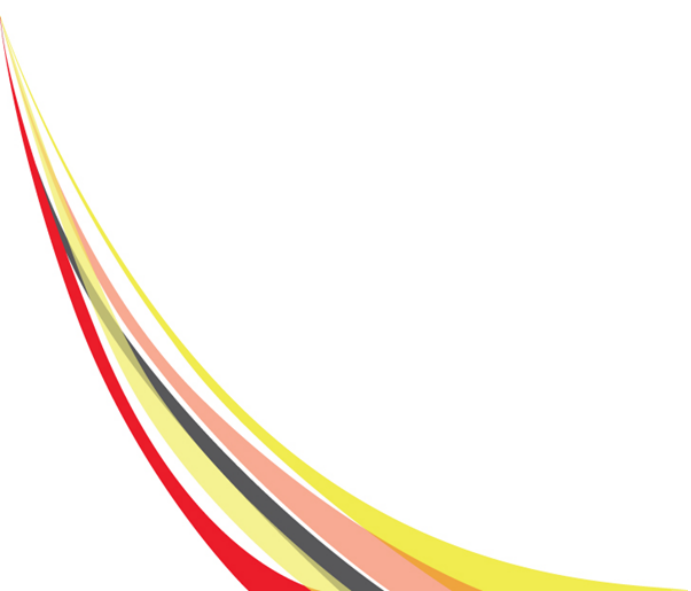


CONFIGURATION EXAMPLES

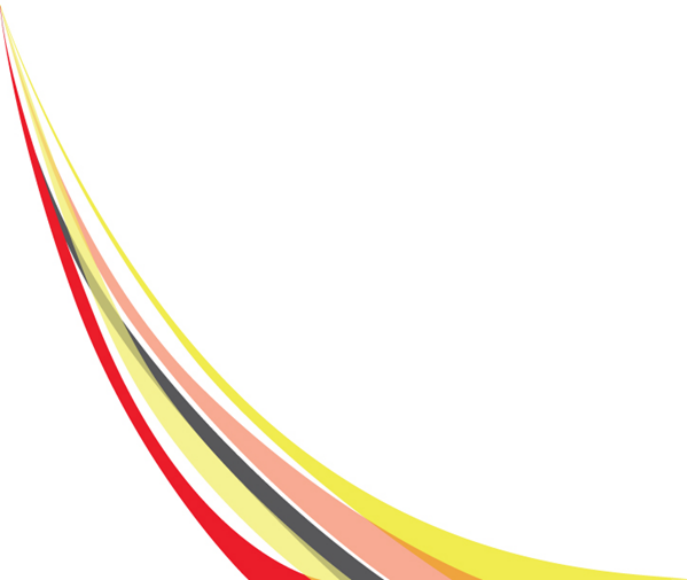
Basic

Intermediate

Advanced



SUMMARY



Summary - Review



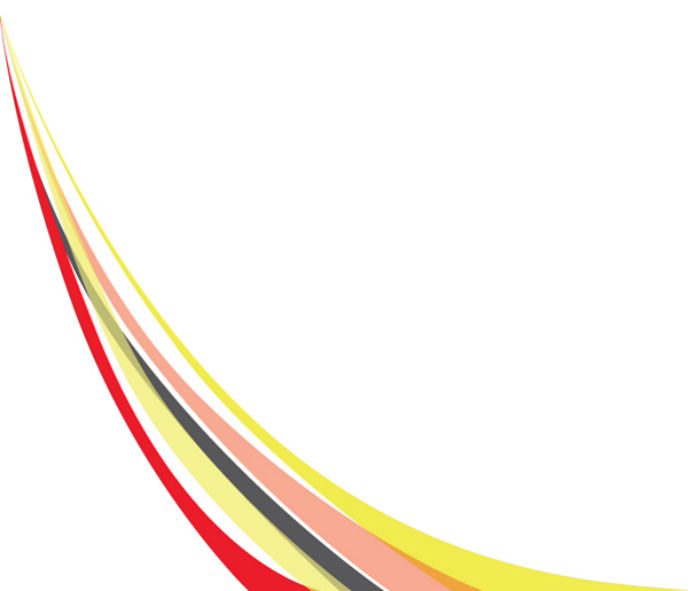
- OFBiz
 - Definition, Users
- Configuration
 - Benefits, Levels, Examples
- Conclusion
 - OFBiz is a tool
 - Can use configuration or development
 - Understanding what you can do
 - Look for creative solutions



THANK YOU FOR LISTENING

Questions?

Comments?



Referenced Images



- Pixabay.com
- OFBiz Business Overview:
 - From the Noun Project : Client created by Chris Dawson, Roue de camion created by Luis Prado, Cle de Molette created by Andy Fuchs, Worker created by Mundo, Book created by Dmitry Baranovskiy, Jarticule.com Cylindre SQL

