ERP and Data Mining introduction with ERP5

by [OSOE Project](#)
▼ Details

Agenda

- What are the objectives of the course
- How the sessions are organised
- What is the plan of the course
- How you will be evaluated

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Trade documents

- Learn universal and fundamental workflow of companies
- Understand by practising what is an ERP/CRM/KM
- Connect an ERP/CRM/KM to Data Mining Tools
- Being capable of configuring an ERP/CRM/KM

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Introduction to ERP and Data Mining with ERP5 is a lesson which has four main goals.

 - The first one is to teach you the universal and fundamental work-flow of the companies. By doing so, you will be able to understand how is organised any company and how ERP systems help companies to improve their performance by managing their business process.

 - The second step is to see how the theoretical work-flow is applied in an ERP. For this we will use ERP5 instances delivered to each student of this lesson. You will then be able to use it as companies do everyday.

 - The third step is to learn how to use information available in ERP/CRM/DMS systems to produce useful reports. It will be performed through an introduction to Data Mining.

 - The last objective is for you to be capable of configuring ERP5 categories. Since the configuration is made through a spreadsheet, it is not the technical performance which matters but the way you fill the spreadsheet and by doing so you organise the company.

Sessions organisation

Height sessions of three hours each organised as follows:

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Every session will be organise in the same manner.

We will begin with a presentation of the theoretical and universal work-flow of the company. Then you will have time to follow three ERP5 tutorials related with the studied workflows. During the tutorials, you are free to ask your questions to the teacher.

We will now see the program of the eight sessions.

Session 1: Carreers and Assignments

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During session one which is today, we will see how are handle career and assignment in such systems.

Those two notions are here to help people to manage human resources.

The career work-flow is very simple since careers are made of career steps which come one after the other.

Assignment are a little bit different since a person can have many assignments in the same time.

One assignment and career will be studied, we will then spend time on the first three ERP5 Tutorials which are:

  - How to login/logout which teaches you the basic of ERP5 connection.

  - How to create persons will teach you how to create a document in ERP5 which will represent the person.

  - How to create organisation will teach you how to create a document in ERP5 which will represent the organisation.

Session 2: CRM Events

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Session is part one of lesson about Customer Relationship Management (CRM) part of the ERP system.

We will study events and its specific work-flow. Events are documents in the systems which represent every interaction we have with our customers, our suppliers etc.

Recording every « event » which occurred during the company's activity will help us to learn more about our customers and our suppliers. Moreover information about what have been done with or said to a specific person will be available to persons who need it.

Then three tutorials will be followed:

How to link persons and organisations will teach you how to link the document which represents the person to the document which represents the organisation for which is working the person.

How to create new events will teach you how to create new events in ERP5, you will then see how phone calls, emails, fax etc. look like in such systems.

How to post outgoing events will teach you how you can post events such as emails directly from ERP5.

Session 3: CRM Tickets and Campaigns

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Session three, which is part two of the lesson about Customer Relationship Management will be focused on ticket management.

Tickets are documents in ERP5 which can contain other documents such as events or documents from the Document Management system.

Having such records will help you to organise and follow your interaction with persons outside the company. Specific workflows are applied to tickets depending of their nature.

In ERP5 we have four kinds of tickets: the campaigns, the sale opportunities, the support requests and the meetings. Each one will be studied during this session.

Three tutorials will be followed:

How to create campaigns will teach you how to create campaigns in ERP5.

How to request someone to post events will teach you the specific case of outgoing event management.

How to process incoming events will teach you how to proceed with incoming events.

Session 4: Sales Orders

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Session 4 which is part 1 of 3 about Trade management will teach you the universal work-flow of a Sale/Purchase Order.

The Sale/Purchase order document in an ERP is the one which will handle trade from the early age of an offer to the final order made by you or the client.

We will then follow the following tutorials:

How to create a product will teach you how to create a document in ERP5 which represent a product.

How to create trade conditions will teach you how to create trade conditions to apply on sale/purchase orders.

How to create Sale Order will teach you how to create a sale order with ERP5.

Session 5: Sales Packing Lists

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Session five, which is part 2 of 3 of trade, will be about packing lists.

Packing lists are used to trace the movements of products. Once an order has been made, products have to be moved, either to send the products to the customer, or to receive them from the supplier.

The tutorials will be:

How to manage packing lists, which will introduce you to packing lists in ERP5.

How to manage invoice will teach you how invoice are generated from packing lists.

How to create payment will teach you how to create a payment related or not to a specific invoice.

Session 6: IFRS Accounting

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Session 6, which is the final session of the trade management, will be about IFRS accounting.

During this session we will see what is the work-flow of an accounting transaction and what is IFRS accounting.

Tutorials will be:

How to create a purchase invoice transaction

How to generate accounting reports

How to create a chart of account will teach you what is an accounting account, what is a financial section and what are the different types of accounts.

Session 7: Document Management

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Document management is a very important point of such system. It allows companies to organise and share their knowledge. This session will be a quick introduction of how to manage electronical documents:

How to manage document revision will teach you what is a version, a revision and how it can be used to organise the work on documents within a company.

How to translate a document will teach you how to manage the translation of a master document in many different languages.

How to attach documents to records in ERP5 will teach you how to link the documents to any record into ERP5.

Session 8: Data Mining

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Session 8 is about Data Mining. Once a company use a system like ERP5 to manage everyday information, it is important to learn how to use such information to help with decisions which have to be made.

Creating good reports thanks to Data Mining tools is a very important aspect of the ERP/CRM/DMS systems.

Evaluation

- Prepare and configure an ERP:

- Real case or fictive (Real cases will be more appreciate)
- Data mining processus:
- Imagine and create a useful report for the chosen company.

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This lesson will be evaluated through the preparation and configuration of an ERP system, such as ERP5, to a real or fictive business case. Real cases will be appreciated and will be more likely to give you an idea of configuration which have to be made in order to fulfill the needs of the company.

Students will have to choose and describe their company for session 4, thanks to the document provided by the teacher.

Then you will have to imagine and create a useful report for your company in order to help them taking decisions.

- Real case or fictive (Real cases will be more appreciate)
- Data mining processus:
- Imagine and create a useful report for the chosen company.

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