

Level:	Undergraduate / Graduate	Duration:	8 x 3 hours
Technical requirements:	Internet connection with standard compliant web browser	Contributors:	Jean-Paul Smets, Jacques Honoré, Klaus Wölfel, Jingjing Xu

Description:

- The first goal is to **teach universal workflows** in companies. By doing so, students will be able to understand fundamentals of how companies are organized and how ERP systems help companies to improve their performance by managing their business process.
- The second goal is to **observe how workflows are implemented in an ERP**. For this we will use ERP5 instances delivered through SlapOS to each student of this lesson. Students will then be able to practice each workflow as company staff do everyday.
- The third goal is to **teach how to perform an initial consulting process for an ERP implementation**. We will use an online questionnaire with the most important questions to ask to a company during this process. The objective of the questionnaire is to identify those business processes which are not successful enough and which can be improved using an ERP. The objective is to understand how to set the priorities for an ERP implementation.
- The fourth goal is to **teach how to configure an ERP** through the definition of so-called categories. Since the configuration is made through a spreadsheet, no programming skills are needed and the focus is kept on management and organization rather than on technical details.

Before you start:

There are two Versions of the course. The standard way to do the course is by following the Virtual Machine Variant. The alternate version of the course is based on a link to an online instance of ERP5. Before you proceed further make sure you read [this link](#) to understand which version applies to you. [This link](#) will also teach you about the Evaluation of the course and how to use the FAQ and Forum.

- **Important note for students !**

For Questions or Problems:

- [Class FAQ](#): Read this before asking any question to the forum.
- [Class Forum](#): Ask questions to the forum if you get into trouble and the FAQ did not provide an answer.

Preparations A: Virtual Machine Course Variant

- [Tutorial: How to install and use the ERP5 Virtual Machine](#) (Presentation) (Chapter View)

Preparations B: Online Instance Course Variant

Only if you have got a link for an online ERP5 Instance and if you have been specifically told do the Online Instance Course Variant.

- [Tutorial: Configure your instance using ERP5 Configurator](#) (Presentation) (Chapter View)

Introduction

- [Presentation: Class Overview](#) (Presentation) (Chapter View) □
- [Presentation: Introduction to ERPs](#) (Presentation) (Chapter View)

Session 1: Careers and Assignments

- [Presentation: Careers and Assignments](#) (Presentation) (Chapter View) □
- [Tutorial 1: How to create Persons](#) (Presentation) (Chapter View)
- [Tutorial 2: How to create new User](#) (Presentation) (Chapter View)
- [Tutorial 3: How to create Organisations](#) (Presentation) (Chapter View)
- [Tutorial 4: How to create Bank Accounts](#) (Presentation) (Chapter View)
- [Tutorial 5: Linking Persons and Organisations](#) (Presentation) (Chapter View)

Session 2: CRM Tickets and Events

- [Presentation: Incoming and outgoing Events](#) (Presentation) (Chapter View) □
- [Presentation: Tickets and Campaigns](#) (Presentation) (Chapter View)
- [Tutorial 1: How to create Campaigns](#) (Presentation) (Chapter View)
- [Tutorial 2: How to create Events in Campaigns](#) (Presentation) (Chapter View)
- [Tutorial 3: How to post outgoing Events](#) (Presentation) (Chapter View)
- [Tutorial 4: How to process incoming Events](#) (Presentation) (Chapter View)
- [Tutorial 5: How to manage Support Requests](#) (Presentation) (Chapter View)

Session 3: Sale Orders

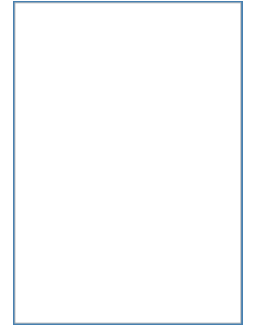
- [Presentation: Sale Orders and Products \(Presentation\) \(Chapter View\)](#)
- [Tutorial 1: How to create Products\(Presentation\) \(Chapter View\)](#)
- [Tutorial 2: How to create Trade Conditions\(Presentation\) \(Chapter View\)](#)
- [Tutorial 3: How to create Sale Orders\(Presentation\) \(Chapter View\)](#)

Session 4: Sale Packing Lists

- [Presentation: Packing Lists \(Presentation\) \(Chapter View\)](#)
- [Tutorial 1: How to manage Packing Lists\(Presentation\) \(Chapter View\)](#)
- [Tutorial 2: How to manage Invoices \(Presentation\) \(Chapter View\)](#)
- [Tutorial 3: How to create a Payment\(Presentation\) \(Chapter View\)](#)

Session 5: IFRS Accounting

- [Presentation: Accounting for mathematicians \(Presentation\) \(Chapter View\)](#)
- [Tutorial 1: How to create Invoice Transaction from Scratch\(Presentation\) \(Chapter View\)](#)
- [Tutorial 2: How to create Accounting Report\(Presentation\) \(Chapter View\)](#)



Session 6: Document Management

- [Tutorial: How to manage document \(Presentation\) \(Chapter View\)](#)

Session 7: ERP Consulting and Configuration

- [Presentation: Consulting and Configuration Questionnaire \(Presentation\) \(Chapter View\)](#)
- [How to fill the Configuration Questionnaire and improve the Answer Set\(Presentation\) \(Chapter View\)](#)
- [How to evaluate the answers from the interview \(read before you interview the company\)\(Presentation\) \(Chapter View\)](#)
- [How to fill the Category Spreadsheet \(Presentation\) \(Chapter View\)](#)

Case Study: Zawe Fashion Shop

- [Zawe ERP5 Implementation Success Case](#)
- [Case Study Interview](#)
- [Case Study Spreadsheet Sample](#)

Evaluation

- [Evaluation Online Questionnaire \(Register\)](#)
- [How to add partner to your answer set \(Presentation\) \(Chapter View\)](#)
- [Questionnaire Export](#)
- [Questionnaire Graph](#)
- [Evaluation Spreadsheet Sample](#)
- [Evaluation Spreadsheet Template](#)

Peer Review

- [How to conduct a peer review \(Presentation\) \(Chapter View\)](#)
- [Peer Review Checklist](#)

Professor Handbook

- [How to correct the Online Questionnaire \(Presentation\) \(Chapter View\)](#)
- [How to assign students as peer reviewers\(Presentation\) \(Chapter View\)](#)
- [ERP Class Planning](#)
- [Telecom Bretagne ERP Class Planning \(Presentation\)](#)