



# **Open Object Installation Manuals**

***Release 7.0.0***

**OpenERP SA**

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# CONTENTS

<b>I</b>	<b>Get started with the OpenERP Online Offer (SAAS)</b>	<b>7</b>
<b>1</b>	<b>No Lock-in</b>	<b>9</b>
<b>2</b>	<b>FAQs</b>	<b>11</b>
2.1	General . . . . .	11
2.2	Pricing and Payments . . . . .	11
2.3	Infrastructure and Security . . . . .	12
2.4	Data Import . . . . .	12
2.5	Services . . . . .	13
2.6	Solutions . . . . .	13
<b>II</b>	<b>OpenERP Installation on Linux</b>	<b>15</b>
<b>3</b>	<b>PostgreSQL Server Installation and Configuration</b>	<b>19</b>
3.1	Example on Ubuntu . . . . .	19
3.2	Setup a PostgreSQL user for OpenERP . . . . .	20
<b>4</b>	<b>OpenERP Server Installation</b>	<b>23</b>
4.1	Installing the required packages . . . . .	23
4.2	Downloading the OpenERP Server . . . . .	24
4.3	Testing the OpenERP Server . . . . .	25
4.4	Installing the OpenERP Server . . . . .	25
4.5	Creating a configuration file for OpenERP Server . . . . .	25
<b>5</b>	<b>OpenERP GTK Client Installation</b>	<b>27</b>
5.1	Installing the required packages . . . . .	27
5.2	Downloading the OpenERP Client . . . . .	28
5.3	Testing the OpenERP Client . . . . .	28
5.4	Installing the OpenERP Client . . . . .	28
5.5	Configuring a PDF Viewer . . . . .	29
<b>6</b>	<b>OpenERP Web Installation</b>	<b>31</b>
6.1	Running the OpenERP Web Client . . . . .	31
6.2	Supported Browsers . . . . .	31
<b>7</b>	<b>Updating your OpenERP Installation</b>	<b>33</b>
7.1	Going to a Newer Minor/Patch Release . . . . .	33
7.2	Going to a Newer Major Release . . . . .	34
<b>III</b>	<b>OpenERP Installation on Windows</b>	<b>35</b>
<b>8</b>	<b>OpenERP All-In-One Installation</b>	<b>39</b>

8.1	Downloading OpenERP All-In-One . . . . .	39
8.2	Installing the OpenERP All-In-One . . . . .	40
8.3	Connecting to OpenERP . . . . .	41
<b>9</b>	<b>PostgreSQL Server Installation and Configuration</b>	<b>43</b>
9.1	Installing PostgreSQL Server . . . . .	43
9.2	Setup a PostgreSQL User . . . . .	43
<b>10</b>	<b>OpenERP Server Installation</b>	<b>45</b>
10.1	Downloading the OpenERP Server . . . . .	45
10.2	Installing the OpenERP Server . . . . .	45
10.3	Customized Configuration . . . . .	47
10.4	Monitoring the OpenERP Server . . . . .	48
10.5	Congratulations, you have successfully installed OpenERP Server . . . . .	50
<b>11</b>	<b>OpenERP Client Installation</b>	<b>51</b>
11.1	Downloading the OpenERP Client . . . . .	51
11.2	Installing the OpenERP Client . . . . .	51
11.3	Starting the OpenERP Client . . . . .	52
<b>12</b>	<b>OpenERP Web Installation</b>	<b>53</b>
12.1	Running the OpenERP Web Client . . . . .	53
12.2	Supported Browsers . . . . .	53
<b>13</b>	<b>Troubleshooting and Windows Complementary Install Information</b>	<b>55</b>
13.1	PostgreSQL Administration . . . . .	55
<b>14</b>	<b>Updating your OpenERP Installation</b>	<b>57</b>
14.1	Going to a Newer Minor/Patch Release . . . . .	57
14.2	Going to a Newer Major Release . . . . .	58
<b>IV</b>	<b>OpenERP Publisher Warranty Migration</b>	<b>59</b>
<b>15</b>	<b>How to proceed for your database migration?</b>	<b>61</b>
15.1	Migration Process . . . . .	61
15.2	How to restore a database? . . . . .	62
15.3	How to keep your data confidential? . . . . .	63
	<b>Index</b>	<b>65</b>

This chapter contains the general installation procedure for deploying OpenERP on the main supported platforms.

For **OpenERP Online (SaaS mode)** the installation is as simple as creating a new account on <https://www.openerp.com/online>. The first section in this chapter provides the answer to Frequently Asked Questions for SaaS usage.

For **OpenERP on-site**, the installation mainly consists of installing PostgreSQL (the database engine used by OpenERP), Python (built-in on most platforms) and then installing OpenERP itself, as an all-in-one package.

**Note:**

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*For those familiar with earlier OpenERP versions, the 6.1 series has a different architecture, and only requires the installation of a single OpenERP package.*

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## **Part I**

# **Get started with the OpenERP Online Offer (SAAS)**





# NO LOCK-IN

With traditional SaaS solutions, restrictions like the use of proprietary formats tie you to a supplier from the minute you decide to use their services. Such lock-in strategy makes it nearly impossible to choose another supplier without substantial switching costs. Also, nothing prevents the supplier from increasing their prices after 1 or 2 years. With OpenERP Online, you will not fall into such an inflexible situation.

We guarantee that the software running on OpenERP Online is exactly the same as the Open Source official version of OpenERP. Any improvement made on OpenERP will be ported online and vice-versa. Therefore, you can switch from the SaaS version to the local version anytime. This allows you to adapt your infrastructure to the solution that suits your needs the best - whenever you want. Moreover, you are able to change your service provider anytime and continue using the exact same system. Hence, you are not dependent on your hosting or even maintenance partner. In addition, OpenERP works with standard, open formats and programming languages which allow you to export your data and use it in any other software. These advantages give you total control over your data, your software, your platform.

Table 1.1: OpenERP Online versus Traditional SaaS

Feature	OpenERP Online	Traditional SaaS
Cloud-independent	Yes	No
Vendor-independent	Yes	No
Platform-independent	Yes	No
Software-independent	Yes	No
Format-independent	Yes	No

- Cloud-independent: Switch to the local application (OpenERP) anytime
- Vendor-independent: Multiple providers exist to guarantee competition and low prices
- Platform-independent: Work on any operating system and with any browser
- Software-independent: Interface OpenERP Online with 3rd party web-services
- Format-independent: Export your data in standard reusable format



# FAQS

## 2.1 General

### 2.1.1 What is the difference between OpenERP On-site and OpenERP Online?

There are no differences between OpenERP On-site and OpenERP Online. OpenERP Online always uses the latest official stable version of OpenERP. However, the OpenERP Online offer includes several additional services: hosting, database management, stable security update, backups, maintenance, bug fixing and migrations, etc.

### 2.1.2 What are the Services included in the OpenERP Online Subscription?

For every subscription, we provide the following hardware resources:

- One application server for OpenERP, with web and GTK access,
- Two incremental backup servers,
- An access to the control center, backup and monitoring system.

It also includes the following services:

- **Maintenance services**
  1. Bug fixes analyzed within 3 working days
  2. Migrations to each new version
  3. Security updates
- Hosting at high bandwidth in our Europe or U.S. data centers
- Maintenance and 24/7 monitoring of your servers

## 2.2 Pricing and Payments

### 2.2.1 What is OpenERP's Pricing Model?

Our pricing model is extremely simple. We charge \$49 or €39 per month per user, according to the currency you choose. We bill you each month according to the number of users registered at that time. If you add new users during the next 30 days they will only be charged with the next invoice.

The storage volume allowed is 1GB. If you use more we will charge \$6.5 or €5 per extra GB.

## 2.2.2 What is the Payment Process?

You will receive an invoice at the beginning of each billing period, according to the number of active users in the system. Once the invoice is paid, you will get a confirmation that payment has been successful through the secured payment platform. If you do not pay the invoice within the payment term, your account will be deactivated. It will however be reactivated automatically on payment. We will keep your data for 2 months after an account is closed, unless explicitly requested otherwise by the customer.

## 2.2.3 How can I check my Monthly Usage and Invoice?

Daily statistics on your OpenERP Online usage page are available from the control center. Statistics include hours of use by instance, hours of use by day or user, monthly invoice amount, space used by server, etc.

# 2.3 Infrastructure and Security

## 2.3.1 What is the Infrastructure Provided?

For every OpenERP Online subscription, we provide access to the following infrastructure to guarantee you maximum reliability and security:

- OpenERP Server and Web Interface
- PostgreSQL database
- Backup servers
- Access to the control center, so that you can control your OpenERP Online instances and perform actions: create new instances, migrations, duplicate instances, access to backups, etc.

## 2.3.2 Where are the Data Centers Located?

We have two data centers, one in Europe (France) and one in the U.S. (East Coast).

## 2.3.3 Can I get my Data back?

With OpenERP Online, we want to provide you with the maximum flexibility and avoid the traditional Lock-In model of SaaS offers. Therefore, the version of OpenERP used in OpenERP Online is the same as the Open Source version of OpenERP you can install on your premises.

From the control center, you have access to all your backup servers. You can download a dump of your PostgreSQL database and all your files from our FTP access and switch to an on-site installation of OpenERP.

## 2.3.4 Can I get a Shell Access to my Servers?

For security and confidentiality reasons, we do not provide servers' shell access to our customers. We only allow 3 OpenERP employees to have a root access to our customers' servers.

# 2.4 Data Import

## 2.4.1 I already use OpenERP, can I Migrate to the OpenERP Online Offer?

Yes, this is possible if your instance uses only modules from the latest official (certified) addons. Contact our sales team to get a quotation: [online@openerp.com](mailto:online@openerp.com).

## **2.4.2 Can I Import Data from other Software applications in my OpenERP Online System?**

OpenERP supports data importation from .CSV text files (Comma Separated Values) for any object in the system. If you can export all your data to .CSV files, you should be able to import it in OpenERP. For experts, you can also connect your own scripts through web-services. Read our documentation for more information. We also provide data migration services. Contact us to get a quotation depending on your current software: [online@openerp.com](mailto:online@openerp.com).

## **2.5 Services**

### **2.5.1 Can I request some Services for Support and Training?**

Yes. We provide services at an extra fee on OpenERP Online: support, training, help to customize or configure, data importation, etc. You can also contact an OpenERP partner; most of them provide services on OpenERP Online as well.

### **2.5.2 What can I do if I find a bug in OpenERP Online?**

All OpenERP Online customers benefit from the OpenERP Publisher Warranty (OPW). If you find a bug, please contact our support team at [online@openerp.com](mailto:online@openerp.com).

## **2.6 Solutions**

### **2.6.1 What should I do if I have Specific Needs?**

OpenERP gives you much more flexibility than other traditional ERPs. You can design new features directly in the OpenERP user interface. We provide you with the report designer, the screen and object editor, a workflow designer, etc. Should you want to develop new modules, we advise you to use the on-site edition and have your modules certified by OpenERP to guarantee that they will be supported by OpenERP in the long term.

### **2.6.2 What Languages are Available?**

Over 10 languages are available in OpenERP Online (English, Catalan, Chinese (Simplified), Dutch, Estonian, French, German, Italian, Polish, Portuguese, Spanish). The OpenERP Online control center is only available in English.



## **Part II**

# **OpenERP Installation on Linux**





The installation procedure for OpenERP 6.1 under Linux is explained in this chapter. This procedure is well tested on Ubuntu version 10.04 LTS. For those familiar with earlier OpenERP versions, the 6.1 series has a different architecture:

- The web client is now embedded in the main OpenERP Server, and does not require separate deployment
- The native GTK client is preserved as a legacy component, but the recommended way to use OpenERP is the web interface, as for all modern applications. There is usually no need to install the GTK client at all.

For **Debian-based distributions**, OpenERP is available as an All-In-One application package (`.deb`), that can be installed with a simple click. The package is available on the [OpenERP website's download page](#)

For **RedHat-based platforms**, an experimental RPM distribution is available in our nightly builds. See the [downloads page](#) for more details.

For **other Linux distributions** and for those who prefer a **manual installation**, there are only two steps to deploy OpenERP under Linux: install PostgreSQL, the database engine used by OpenERP, then install OpenERP itself. These steps are described in the following sections:



# POSTGRESQL SERVER INSTALLATION AND CONFIGURATION

**Tip:**

*Methods*

The [PostgreSQL download page](#) lists the available installation methods. Choose the one that best suits your needs.

## 3.1 Example on Ubuntu

Use the following command at your system's command prompt to install the **postgresql** package:

```
sudo apt-get install postgresql
```

For example:

```
openerp@openerp-desktop:/$ sudo apt-get install postgresql
```

For a graphical user interface of **postgresql**, use the following command:

```
sudo apt-get install pgadmin3
```

For example:

```
openerp@openerp-desktop:/$ sudo apt-get install pgadmin3
```

You can find the new menu item **pgAdmin III** in your Ubuntu system menu from *Applications* → *Programming* → *pgAdmin III*.

## 3.2 Setup a PostgreSQL user for OpenERP

When the installations of the required software are done, you must create a PostgreSQL user. This user must be the same as your system user. OpenERP will use this user to connect to PostgreSQL.

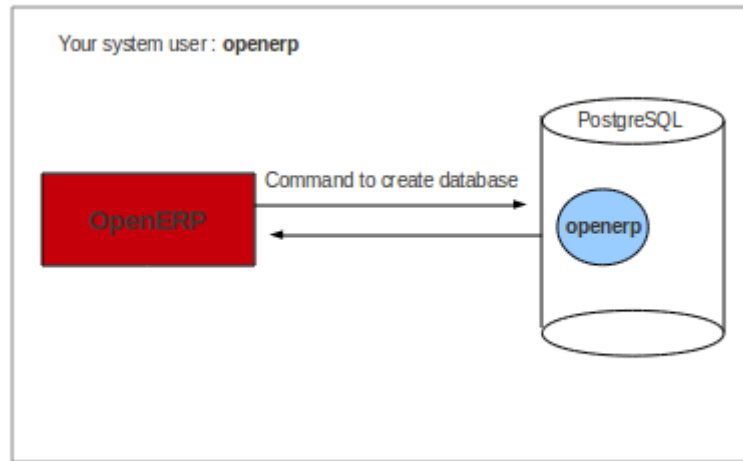


Figure 3.1: Figure demonstrating how OpenERP uses the PostgreSQL user to interact with it

### Tip:

#### Database

Without creating and configuring a PostgreSQL user for OpenERP as described below, you cannot create a database using OpenERP Client.

### 3.2.1 First Method

The default superuser for PostgreSQL is called **postgres**. You may need to login as this user first.

```
openerp@openerp-desktop:/$ sudo su postgres
password: XXXXXXXXXX
```

Now create PostgreSQL user **openerp** using the following command:

```
postgres@openerp-desktop:/$ createuser openerp
Shall the new role be a superuser? (y/n) y
```

Make this new user a superuser. Only then you can create a database using OpenERP Client. In short, **openerp** is the new user created in PostgreSQL for OpenERP. This user is the owner of all the tables created by OpenERP Client.

Now check the list of tables created in PostgreSQL using following command:

```
postgres@openerp-desktop:/$ psql -l
```

You can find the table **template1**, run the following command to use this table:

```
postgres@openerp-desktop:/$ psql template1
```

To apply access rights to the role **openerp** for the database which will be created from OpenERP Client, use the following command:

```
template1=# alter role openerp with password 'postgres';
ALTER ROLE
```

### 3.2.2 Second Method

Another option to create and configure a PostgreSQL user for OpenERP is shown below:

```
postgres@openerp-desktop:/$ createuser --createdb --username postgres --no-createrole
--pwprompt openerp
Enter password for new role: XXXXXXXXXX
Enter it again: XXXXXXXXXX
Shall the new role be a superuser? (y/n) y
CREATE ROLE
```

#### Note:

*Password*

*Note that the password is postgres.*

Option explanations:

- `--createdb` : the new user will be able to create new databases
- `--username postgres` : `createuser` will use the `postgres` user (superuser)
- `--no-createrole` : the new user will not be able to create new users
- `--pwprompt` : `createuser` will ask you the new user's password
- `openerp` : the new user's name

To access your database using **pgAdmin III**, you must configure the database connection as shown in the following figure:

The screenshot shows the 'Properties' dialog box in pgAdmin III. The fields are filled with the following values: Name: localhost, Host: localhost, Port: 5432, SSL: (empty), Maintenance DB: postgres, Username: openerp, Password: (masked with dots), Store password: checked, Restore env?: checked, DB restriction: (empty), Service: (empty), Connect now: checked, and Colour: (empty). At the bottom, there are buttons for Help, OK, and Cancel.

You can now start OpenERP Server. You will probably need to modify the OpenERP configuration file according to your needs which is normally located in `~/ .openerp.rc`.

**Tip:**

---

*Developer Book**You can find information on configuration files in the Developer Book, section Configuration*

---

---

# OPENERP SERVER INSTALLATION

## 4.1 Installing the required packages

Python 2.6 or later is required for OpenERP 6.1. It is built-in in Ubuntu version 10.04 and above. A few Python libraries are also required, as listed below.

On a Debian-based Linux distribution you can install all required dependencies with this single command:

```
apt-get install python-dateutil python-feedparser python-gdata python-ldap \
python-libxslt1 python-lxml python-mako python-openid python-psycopg2 \
python-pybabel python-pychart python-pydot python-pyparsing python-reportlab \
python-simplejson python-tz python-vatnumber python-vobject python-webdav \
python-werkzeug python-xlwt python-yaml python-zsi
```

- *dateutil* : provides powerful extensions to the standard datetime module, available in Python 2.3+.

```
sudo apt-get install python-dateutil
```

- *feedparser* : universal Feed Parser for Python

```
sudo apt-get install python-feedparser
```

- *gdata* : Google Data Python client library

```
sudo apt-get install python-gdata
```

- *ldap* : LDAP interface module

```
sudo apt-get install python-ldap
```

- *libxslt1* : Python bindings for XSLT transformation library

```
sudo apt-get install python-libxslt1
```

- *lxml* : lxml is the most feature-rich and easy-to-use library for working with XML and HTML in the Python language.

```
sudo apt-get install python-lxml
```

- *mako* : fast and lightweight templating for the Python platform.

```
sudo apt-get install python-mako
```

- *openid* : OpenID authentication support for servers and consumers

```
sudo apt-get install python-openid
```

- *psycopg2* : the most popular PostgreSQL adapter for the Python programming language.

```
sudo apt-get install python-psycopg2
```

- *babel* : tools for internationalizing Python applications

```
sudo apt-get install python-pybabel
```

- *pychart* : library for creating high quality Encapsulated Postscript, PDF, PNG, or SVG charts.

```
sudo apt-get install python-pychart
```

- *pydot* : provides a full interface to create, handle, modify and process graphs in Graphviz's dot language.

```
sudo apt-get install python-pydot
```

- *pyparsing* : library for parsing Python code

```
sudo apt-get install python-pyparsing
```

- *reportlab* : The ReportLab Toolkit is the time-proven, ultra-robust, open-source engine for programmatically creating PDF documents and forms the foundation of RML. It also contains a library for creating platform-independent vector graphics. It is a fast, flexible, cross-platform solution written in Python.

```
sudo apt-get install python-reportlab
```

- *simplejson* : simple, fast, extensible JSON encoder/decoder

```
sudo apt-get install python-simplejson
```

- *vatnumber* : module to validate VAT numbers for European countries

```
sudo apt-get install python-vatnumber
```

- *vobject* : VObject simplifies the process of parsing and creating iCalendar and vCard objects.

```
sudo apt-get install python-vobject
```

- *pytz* : World Timezone Definitions for Python

```
sudo apt-get install python-tz
```

- *webdav* : WebDAV server implementation in Python

```
sudo apt-get install python-webdav
```

- *werkzeug* : collection of utilities for WSGI applications

```
sudo apt-get install python-werkzeug
```

- *yaml* : YAML parser and emitter for Python.

```
sudo apt-get install python-yaml
```

- *xlwt* : module for reading/writing Microsoft Excel spreadsheet files

```
sudo apt-get install python-xlwt
```

- *zsi* : Zolera Soap client infrastructure

```
sudo apt-get install python-zsi
```

## 4.2 Downloading the OpenERP Server

The OpenERP server can be downloaded from the [OpenERP website's download page](#)



## 4.3 Testing the OpenERP Server

If you only want to test the server, you do not need to install it. Just unpack the archive and start the `openerp-server` executable:

```
tar -xzf openerp-6.1-latest.tar.gz
cd openerp-6.1-*
./openerp-server
```

The list of available command line parameters can be obtained with the `-h` command-line switch:

```
openerp-server -h
```

## 4.4 Installing the OpenERP Server

The OpenERP Server can be installed very easily using the `setup.py` file:

```
tar -xzf openerp-6.1-latest.tar.gz
cd openerp-6.1-*
sudo python setup.py install
```

If your PostgreSQL server is up and running, you can now run the server using the following command:

```
openerp-server
```

If you do not already have a PostgreSQL server up and running, you can read *PostgreSQL Server Installation and Configuration*.

## 4.5 Creating a configuration file for OpenERP Server

You can start the OpenERP server with the `-s` option to create a configuration file with default options, then modify it. The configuration parameters are similar to the server startup parameters, so have a look at the output of `openerp -h` if you're not sure what a given parameter does:

```
./openerp-server -s -c <config_file_path>
# now edit the config file at <config_file_path>
# and check the -h output for more details...
./openerp-server -h
(...)
# finally start the server with the desired config file
./openerp-server -c <config_file_path>
```

### 4.5.1 Default Configuration file

The default OpenERP configuration file is located in `$HOME/.openerp_serverrc`, that is a file named `.openerp_serverrc` in the home directory of the system user under which OpenERP runs. This is the default value for the `-c` startup parameter.



---

# OPENERP GTK CLIENT INSTALLATION

The native GTK client is available as a legacy interface for users who still require it, but the recommended way to access OpenERP 6.1 is the built-in web interface.

## 5.1 Installing the required packages

Python 2.6 or later is required for OpenERP 6.1. It is built-in in Ubuntu version 10.04 and above. A few Python libraries are also required, as listed below.

On a Debian-based Linux distribution you can install all required dependencies with this single command:

```
apt-get install python-gtk2 python-glade2 python-matplotlib python-dateutil \
python-lxml python-tz python-hippocanvas python-pydot
```

- *gtk* : GTK+ is a highly usable, feature-rich toolkit for creating graphical user interfaces which boosts cross-platform compatibility and an easy-to-use API.

```
sudo apt-get install python-gtk2
```

- *glade* : Glade is a RAD tool to enable quick & easy development of user interfaces for the GTK+ toolkit and the GNOME desktop environment.

```
sudo apt-get install python-glade2
```

- *matplotlib* : matplotlib is a Python 2D plotting library which produces publication quality figures in a variety of hard-copy formats and interactive environments across platforms.

```
sudo apt-get install python-matplotlib
```

- *dateutil* : Provides date/time values in Python

```
sudo apt-get install python-dateutil
```

- *lxml* : XML support for Python platform.

```
sudo apt-get install python-lxml
```

- *tz* : World Timezone definitions for Python.

```
sudo apt-get install python-tz
```

- *hippocanvas* : The Hippo Canvas is a Cairo/GObject/GTK+ based canvas, written in C with support for flexible layout, CSS styling, and initial work on animations.

```
sudo apt-get install python-hippocanvas
```

- *pydot* : Python interface to Graphviz's Dot language.

```
sudo apt-get install python-pydot
```

- Any PDF viewer, properly registered in your system to automatically open PDF files (e.g. xpdf, kpdf, acroread, evince, etc..). See the *Configuring a PDF Viewer* section.

#### Note:

##### *RedHat-based distributions*

*As an alternative to the above commands meant for Debian-based distributions, the following command should install the required dependencies for RedHat-based systems:*

```
yum install pygtk2 glade3 pydot python-dateutil python-matplotlib \
python-lxml python-hippo-canvas python-tz
```

#### Note:

##### *Mandriva*

*As an alternative to the above commands meant for Debian-based distributions, the following command should install the required dependencies for Mandriva:*

```
yum install pygtk2 glade3 pydot python-dateutil python-matplotlib \
python-lxml python-hippo-canvas python-tz
```

## 5.2 Downloading the OpenERP Client

The OpenERP client can be downloaded from the [OpenERP website's download page](#)

## 5.3 Testing the OpenERP Client

If you only want to test the client, you do not need to install it. Just unpack the archive and start the openerp-client executable:

```
tar -xzf openerp-client-6.1-latest.tar.gz
cd openerp-client-6.1-*/bin
./openerp-client.py
```

The list of available command line parameters can be obtained with the `-h` command-line switch:

```
./openerp-client.py -h
```

## 5.4 Installing the OpenERP Client

The client can be installed very easily using the *setup.py* file:

```
tar -xzf openerp-client-6.1-latest.tar.gz
cd openerp-client-6.1-*
sudo python setup.py install
```

You can now run the client using the following command:

```
openerp-client
```

## 5.5 Configuring a PDF Viewer

By default the OpenERP Client will use your default PDF application for displaying PDF files. You may customize this behavior by configuring a different default PDF application on your system.

Alternatively, you may also specify explicitly the PDF command to use to display PDF files in the OpenERP configuration file, normally located in your HOME directory, and named `'.openerprc'`. Find the `[printer]` section and edit the `softpath` parameter. For example:

```
[printer]
softpath = kpdf
```



# OPENERP WEB INSTALLATION

As of OpenERP 6.1, the web client is included as part of the standard all-in-one installation, so no extra step is required to install it.

The all-in-one version may be downloaded from the [OpenERP website's download page](#)

## 6.1 Running the OpenERP Web Client

The OpenERP 6.1 web client is automatically available as soon as the OpenERP server is running. You can access it by connecting with your favorite web browser to the address and port of your OpenERP server, by default `http://localhost:8069`.

## 6.2 Supported Browsers

The OpenERP Web Client is known to work best with the latest version of Google Chrome or Mozilla Firefox. The following browsers are supported:

1. Google Chrome 9.0 or later
2. Firefox 4.0 or later
3. Safari 4.1 or later
4. Opera 10.0 or later
5. Internet Explorer 8.0 or later (later is strongly recommended)

**Note:**

---

*Contrary to OpenERP 6.0, no flash plugin is required to access the OpenERP 6.1 web interface*

---





# UPDATING YOUR OPENERP INSTALLATION

## 7.1 Going to a Newer Minor/Patch Release

OpenERP's release policy states that minor/patch releases of the stable versions are usually published every month. These are recommended for production deployment, as they include the latest security updates and bugfixes, and do not require any migration process.

Of course you should always test these updates on a staging environment (copy of your production environment) before applying them on the real production systems.

Minor/patch releases of OpenERP are identified by an increasing 3rd release number, for example, v6.0.15 would be the 15th patch release of OpenERP v6.0.

For more details regarding the release cycle, have a look at the section *release\_cycle*.

### Note:

#### Minor Versions

*You can skip minor versions, for example, you do not need to install all the intermediary versions between 6.0.6 and 6.0.15 if you need to upgrade an outdated installation, as long as you stay in the same version line (6.0 in this example).*

Updating an existing OpenERP installation to a newer patch release boils down to 2 operations:

- Install the new code over the existing one
- Synchronize each existing database with the new code

In order to accomplish this, the following step-by-step procedure should give you the best results:

1. Make a fresh backup of all existing databases, as well as a backup of the files of your OpenERP installation (server, web and addons), just in case.
2. Locate the executable file to start the Server, it should be named `openerp-server.py`. You may want to have a look at the running processes to find out the command-line parameters that are passed to the server (needed below).
3. Stop the OpenERP server as well as the Web Server (if present).
4. Update the source files to the latest release, or simply install the new releases over the previous ones.
5. Start the server manually (directly call the executable you located above), with the following additional parameters, to trigger an update of all module data and views in the database, based on the new source files (include your usual startup parameters, if any, and replace `DB_NAME` with the name of the OpenERP database you wish to update):

```
openerp-server.py -d DB_NAME -u all
```

6. Let the server complete its startup (watch the log for the final message that says OpenERP server is running, waiting for connections or wait until you can connect to that database with a GTK client), then stop the server with `Ctrl+C` and repeat the previous step for each database on this OpenERP installation (any database not updated will use the latest business logic but might have errors or missing improvements in the views until you update it using this procedure).
7. Stop the server again with `Ctrl+C` and restart it normally (no extra parameters anymore).
8. Start the Web Server if present.
9. You can now proceed with the update of the GTK clients, by simply reinstalling the latest version over the previous one.

**Note:***Server*

*As an alternative to restarting the server in update mode for each database, as described above, you may try to start the server normally, and then connect to each database as the Administrator user, open the list of modules and manually trigger an update of the base module. Because all modules depend on base they will be updated too. However this requires the Administrator password of each database and may not work for some updates, specifically when the update prevents you from logging into the system.*

**Tip:***Developer Book*

*For more technical details on the actual operations accomplished by the server during such an update, you may refer to the corresponding section in the Developer Book: `technical_update_procedure`.*

## 7.2 Going to a Newer Major Release

The frequency of major stable releases has fluctuated in the past, but the current policy is to release a new stable version every 6 months on average, with one out of three stable versions being a Long Term Support (LTS) version. An LTS version is a normal stable version, but one that is supported for an extended time under the OpenERP Publisher's Warranty (OPW). Stable versions are labelled as a decimal number with 2 components (e.g. 6.1), where the leftmost part indicates the corresponding Long Term Support (LTS) version, and the second digit indicates successive stable releases between two LTS versions.

Transitioning to the next major release implies a lot more changes than jumping to another minor release. As the underlying OpenERP data structures usually evolve quite a bit from one major release to the next, a full migration of the existing data is needed. Each major release will be published with specific recommendations and procedures for upgrading an existing OpenERP system to the next major version.

## **Part III**

# **OpenERP Installation on Windows**



In this chapter, you will see the installation of OpenERP 6.1 on a Windows system. This procedure is well-tested on Windows 7.

You have two options for the installation of OpenERP on a Windows system:

- **All-In-One Installation** This is the easiest and quickest way to install OpenERP. It installs all components (OpenERP Server and PostgreSQL database) pre-configured on one computer. This installation is recommended if you do not have any major customizations.
- **Independent Installation** If you choose this mode of installation, all the components required to run OpenERP will have to be downloaded and installed separately. You will have to opt for an independent installation if you plan to install the components on separate machines. This mode is also practical if you are already working with or plan to use a different version of PostgreSQL than the one provided with the All-In-One installer.



# OPENERP ALL-IN-ONE INSTALLATION

Each time a new release of OpenERP is made, OpenERP supplies a complete Windows auto-installer for it. This contains all of the components you need – the PostgreSQL database server, the OpenERP application server, the GTK application client and the Web client.

This auto-installer enables you to install the whole system in just a few mouse clicks. The initial configuration is set up during installation, making it possible to start using it very quickly, as long as you do not want to change the underlying code. It is aimed at the installation of everything on a single PC, but you can later connect GTK clients from other PCs, Macs and Linux boxes to it as well.

## 8.1 Downloading OpenERP All-In-One

The first step is to download the OpenERP All-In-One installer. At this stage, you must choose which version to install – the stable version or the development version. If you are planning to put it straight into production we strongly advise you to choose the stable version.

**Note:**

*Stable Versions and Development Versions*

*OpenERP development proceeds in two parallel tracks: stable versions and development versions. New functionality is integrated into the development branch. This branch is more advanced than the stable branch, but it can contain undiscovered and unfixed faults. A new development release is made every month or so, and OpenERP has made the code repository available so you can download the very latest revisions if you want. The stable branch is designed for production environments. Here, releases of new functionality are made only about once a year after a long period of testing and validation. Only bug fixes are released through the year on the stable branch.*

To download OpenERP for Windows, follow these steps:

1. Navigate to the site <http://www.openerp.com>.
2. Click the *Downloads* button at the right, then, under *Windows Auto-Installer*, select **All-In-One**.
3. Before you can proceed with the download, you will be asked to fill an online form with your contact and company details and information regarding your interest in OpenERP.
4. Once you submit the online form, the All-In-One Windows installer is automatically downloaded.
5. Save the file on your PC - it is quite a substantial size because it downloads everything including the PostgreSQL database system (version 8.3, at the time of writing), so it will take some time.

## 8.2 Installing the OpenERP All-In-One

To install OpenERP and its database, you must be signed in as an Administrator on your PC.

If you have previously tried to install the All-In-One version of OpenERP, you will have to uninstall that first, because various elements of a previous installation could interfere with your new installation. Make sure that all Tiny ERP, OpenERP and PostgreSQL applications are removed: you are likely to have to restart your PC to finish removing all traces of them.

Double-click the installer file to install OpenERP and accept the default parameters on each dialog box as you go. The All-In-One installer is the simplest mode of installation and has the following steps:

- 1. **Select installation language** The default is English. The other option is French.
- 2. **Welcome message** Carefully follow the recommendations given in this step.



Figure 8.1: *Welcome to OpenERP*

- 3. **Licence Agreement** It is important that you accept the GNU General Public License to proceed with installation.
- 4. **Select components to install** You can proceed with the default install type All In One, which will install the OpenERP Server, GTK Desktop Client, Web Client and PostgreSQL Database (version 8.3, at the time of writing). Or, you may customize your installation by selecting only the components you require.

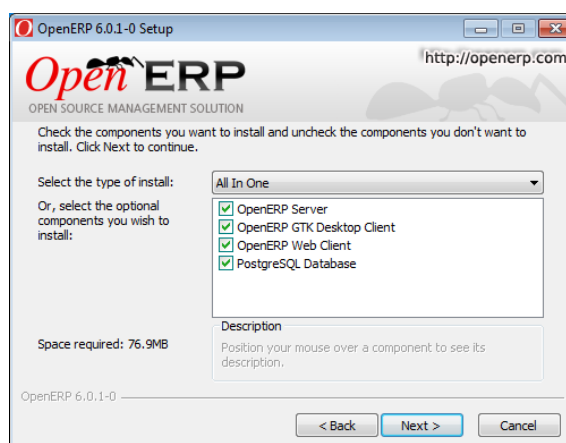


Figure 8.2: *Customize component installation*

- 5. **Configure PostgreSQL connection** The installer will suggest default parameters to complete your PostgreSQL connection configuration. You may accept the defaults, or change it according to



your requirement.

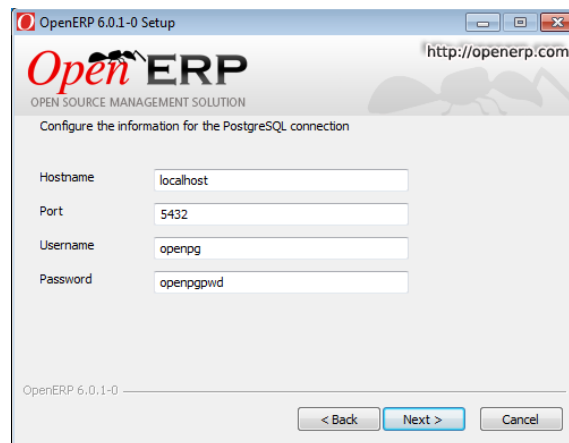


Figure 8.3: PostgreSQL configuration

- **6. Select folder for installation** By default, OpenERP is installed in `C:\Program Files\OpenERP 6.0`. To install in a different folder, browse for a different location(folder) in this step.
- **7. Install** The automatic installation of OpenERP begins and you can view its progress.
- **8. Finish** On successful installation of OpenERP, you will get an appropriate confirmation. You can click *Finish* to close the setup wizard.



Figure 8.4: End of setup wizard

## 8.3 Connecting to OpenERP

You do not need to manually start the OpenERP Server, because it is installed as a Windows service and automatically started. You may however access it from the shortcuts created in the *Start* menu for *OpenERP*, or simply by connecting with your preferred browser to web interface, by default available on `http://localhost:8069`

Use the database list at the top-right corner to choose a database to connect to. As this would be the first time you are using OpenERP since its installation, your database list will be empty. You can create a new database through the `Manage databases` link on the login page.



---

# POSTGRESQL SERVER INSTALLATION AND CONFIGURATION

In this chapter, you will see how to configure PostgreSQL for its use with OpenERP. The following procedure is well-tested on PostgreSQL v9.0.

## 9.1 Installing PostgreSQL Server

You can download the Windows installer from the [PostgreSQL download page](#)

Depending on your need, choose either the *One Click Installer* or the *pgInstaller* and run the executable you have just downloaded.

## 9.2 Setup a PostgreSQL User

When the required software installations are complete, you must create a PostgreSQL user. OpenERP will use this user to connect to PostgreSQL.

### 9.2.1 Add a User

Start a Windows console (run the `cmd` command in the *Search programs and files* text box of the *Start* menu).

Change the directory to the *PostgreSQL* bin directory (e.g. `C:\Program Files\PostgreSQL\9.0\bin`) or add this directory to your *PATH* environment variable.

The default superuser for PostgreSQL is called *postgres*. The password was chosen during the PostgreSQL installation.

In your Windows console, type:

```
C:\Program Files\PostgreSQL\9.0\bin>createuser.exe --createdb --username postgres --no-createrole
Enter password for new role: openpgpwd
Enter it again: openpgpwd
Shall the new role be a superuser? (y/n) y
Password: XXXXXXXXXXXX
```

- \* line 1 is the command itself
- \* line 2 asks you the new user's password
- \* line 3 asks you to confirm the new user's password
- \* line 4 new role is superuser or not?
- \* line 5 asks you the \*postgres\* user's password

Option explanations:

- `--createdb` : the new user will be able to create new databases
- `--username postgres` : *createuser* will use the *postgres* user (superuser)
- `--no-createrole` : the new user will not be able to create new users
- `--pwprompt` : *createuser* will ask you the new user's password
- `openpg` : the new user's name. Alternatively, you may specify a different username.
- `openpgpwd` : the new user's password. Alternatively, you may specify a different password.

#### Note:

##### Password

*In OpenERP v6, `openpg` and `openpgpwd` are the default username and password used during the OpenERP Server installation. If you plan to change these defaults for the server, or have already installed the server with different values, you have to use those user configuration values when you create a PostgreSQL user for OpenERP.*

Now use *pgAdmin III* to create database “openerpdemo” with owner “openpg”:

```
CREATE DATABASE openerpdemo WITH OWNER = openpg ENCODING = 'UTF8';
COMMENT ON DATABASE openerpdemo IS 'OpenERP Demo DB';
```

If you have installed the OpenERP Server, you can start it now. If needed, you can override the server configuration by starting the server at a Windows console and specifying command-line options. For more on this, refer the section *Customized Configuration*.

To change a user's password in any Windows version, execute the following:

```
net user <accountname> <newpassword>
e.g. net user postgres postgres
```

If it is a domain account, just add “/DOMAIN” at the end.

If you want to delete it, just execute:

```
net user <accountname> /delete
```

## 9.2.2 Case-Insensitive Search Issue

For an installation which needs full UTF8 character support, consider using postgres  $\geq 8.2.x$ . Using versions prior to this, OpenERP search will not return the expected results for case-insensitive searches, which are used for searching partners, products etc.

Example:

```
SELECT 'x' FROM my_table WHERE 'bét' ilike 'BÉT'
--matches only in 8.2.x
```

# OPENERP SERVER INSTALLATION

The OpenERP Server 6.1 installation works with disks formatted in NTFS (not a FAT or FAT32 partition). The following installation procedure has been well-tested on Windows 7.

**Note:***Windows Versions*

*OpenERP Server does not work on Windows 98 or ME; for obvious reasons – these cannot be formatted using NTFS.*

You will need a PostgreSQL server up and running. If it is not the case, you can read the *PostgreSQL Server Installation and Configuration* section.

## 10.1 Downloading the OpenERP Server

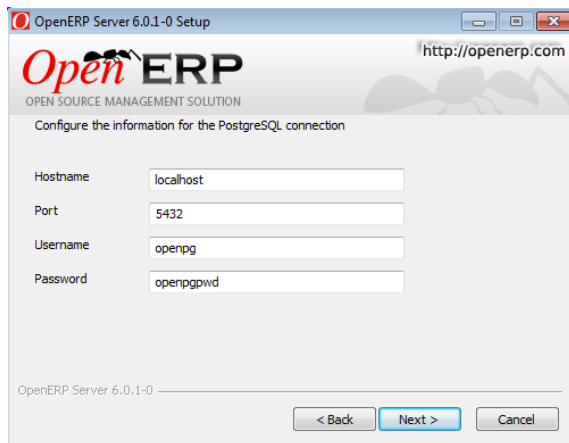
The OpenERP Server can be downloaded from [OpenERP website's download page](#).

Under *Windows Auto-Installer*, choose **All-In-One** to download OpenERP.

## 10.2 Installing the OpenERP Server

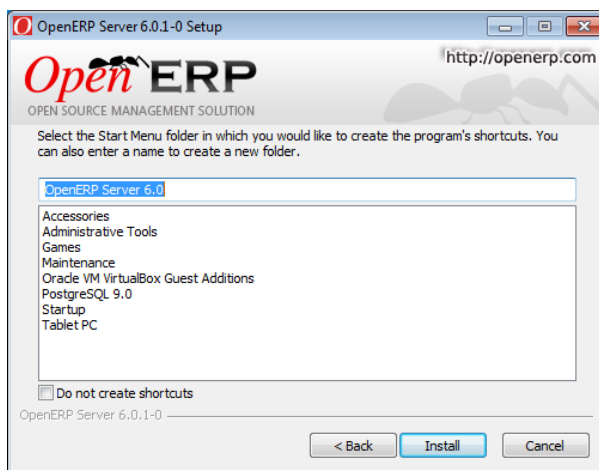
Execute the installer you have just downloaded. It has the following stages:

- 1. **Select installation language** The default is English. The other option is French.
- 2. **Welcome message** Carefully follow the recommendations given in this step.
- 3. **Licence Agreement** It is important that you accept the GNU General Public License to proceed with installation.
- 4. **Select folder for installation** By default, OpenERP Server is installed in C:\Program Files\OpenERP 6.1\Server. To install in a different folder, browse for a different location(folder) in this step.
- 5. **Configure PostgreSQL connection** The installer will suggest default parameters to complete your PostgreSQL connection configuration. You may accept the defaults, or change it according to your requirement.



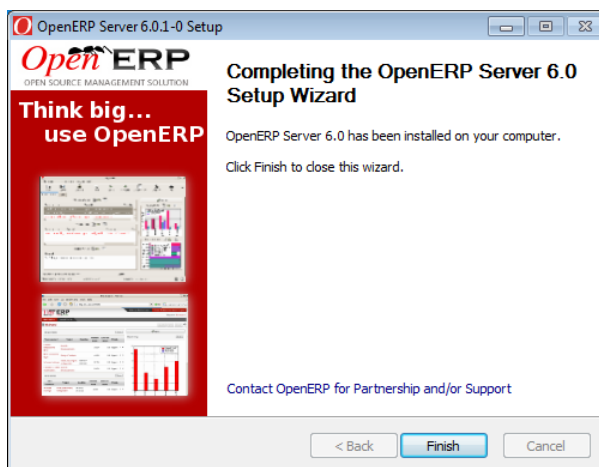
#### *PostgreSQL configuration*

- **6. Create shortcuts** Select a folder in the *Start* menu where you would like to create the program's shortcuts.



#### *Create Start menu shortcuts*

- **7. Install** The automatic installation of OpenERP Server begins and you can view its progress.
- **8. Finish** On successful installation of OpenERP Server, you will get an appropriate confirmation. You can click *Finish* to close the setup wizard.



#### *End of setup wizard*

The OpenERP Server installs as a Windows service. This means you do not have to start the server each time you start the computer and it runs without the need of an open user session.

## 10.3 Customized Configuration

To initialize the server with configurations of your choice, you have to invoke it at the Windows Command prompt with the options you wish to override.

Navigate to the installation directory in `C:\Program Files\OpenERP 6.1\Server\` and type this command but do not execute it yet:

```
openerp-server.exe -d <db_name> -r <db_user> -w <db_password>
--db_host=<postgresql_server_address>
--db_port=<port_no> --logfile="<logfile>"
```

The initialization of OpenERP Server provides necessary information for connection to the PostgreSQL database and the choice of data to load. Here is the explanation of used options:

- `-d <db_name>` : Name of the database created for OpenERP Server.
- `-r <db_user>` : Name of the PostgreSQL user (role).
- `-w <db_password>` : Password of the PostgreSQL user.
- `--db_host=<postgresql_server_address>` : Address of the server where PostgreSQL is. If you have installed PostgreSQL on the same computer as OpenERP Server, you can enter `localhost`, else, the IP address or the name of the distant server.
- `--db_port=<port_no>` : Port number where PostgreSQL listens. The default is 5432.
- `--stop-after-init` : This option stops the server after initialization.
- `--logfile="<logfile>"` : specify an alternate logfile where all the output of server will be saved. The default is `C:\Program Files\OpenERP 6.1\Server\openerp-server.log`.

Before the execution of this command you have to decide the purpose of the database created in OpenERP.

Sample command:

```
openerp-server.exe -d openerpdemo -r openpg -w openpgpwd
--db_host=localhost --logfile="C:\Users\tiny\Desktop\demo_db.log"
--db_port=5430 --stop-after-init
```

Here you have to enter the username and password specified in the PostgreSQL connection configuration during server installation.

When you execute the initialization command, if you specify a logfile, the server runtime output is written to that file, and you will not see any server output in the prompt window. You have only to wait until the prompt comes back.

### 10.3.1 Deciding about the purpose of the database

You can initialize the database with OpenERP Server to:

1. Take a look at the system with modules installed and demo data loaded
2. Install a new clean database system (without demo data)
3. Upgrade an existing version

#### With modules and demo data

If you execute the sample command above, you will get a database with only base modules installed and loaded with demo data. To initialize OpenERP Server with additional modules and its demo data, you need to add this option to the above command:

-i <module name>

Sample command:

```
openerp-server.exe -d openerpdemo --stop-after-init -i sale
```

This command will initialize the OpenERP Server with the module `sale` and its dependencies, and fill its PostgreSQL database with their related demo data. As can be seen, you must specify the target database for the module installation.

To install more than one module, specify a comma-separated module list at the command-line.

### Without demo data (or new clean version)

Execute the command with an option excluding the demo data:

```
--without-demo=all
```

This will load base modules (and other modules if `-i` option is used), but will not load its demo data.

Sample command usage:

```
openerp-server.exe -d openerpdemo --stop-after-init --without-demo=all
```

If you have already initialized the database with demo data loaded, you can create a new database and execute the above command on it.

### Update the database

Execute the command with an option that updates the data structures:

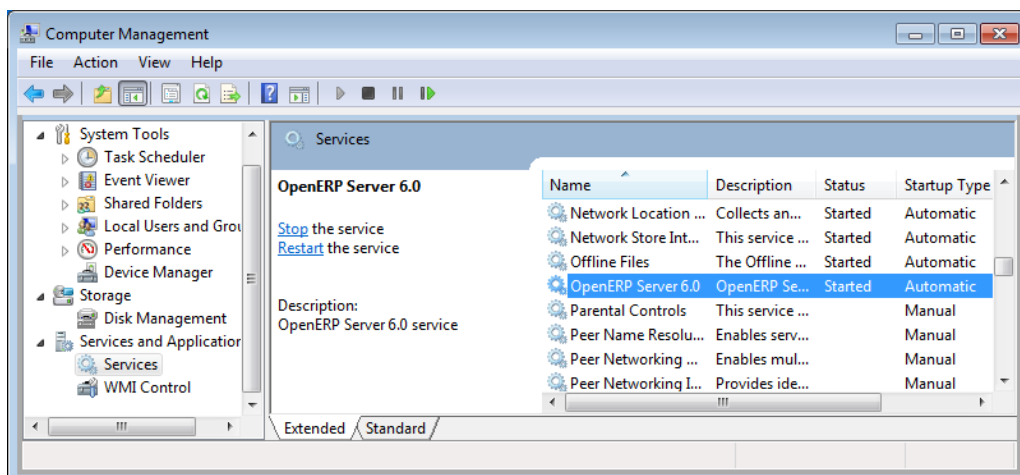
```
--update=all
```

Sample command usage:

```
openerp-server.exe -d openerpdemo --stop-after-init --update=all
```

## 10.4 Monitoring the OpenERP Server

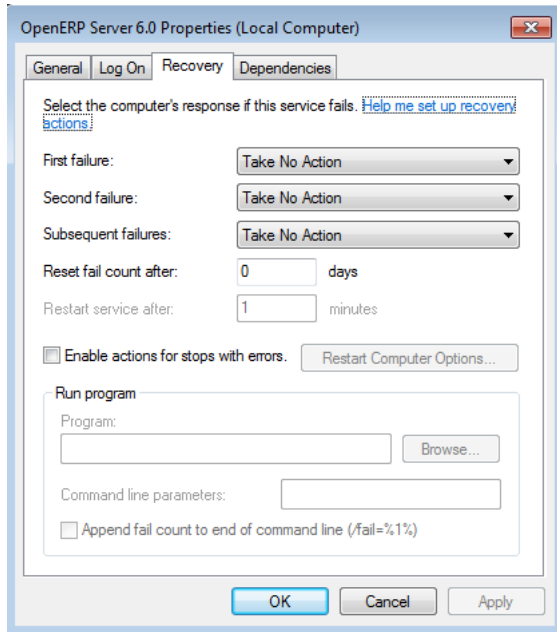
The service and some runtime information is accessible through the Computer Management console in Administrative Tools.



*OpenERP 6.1 in the Services list*

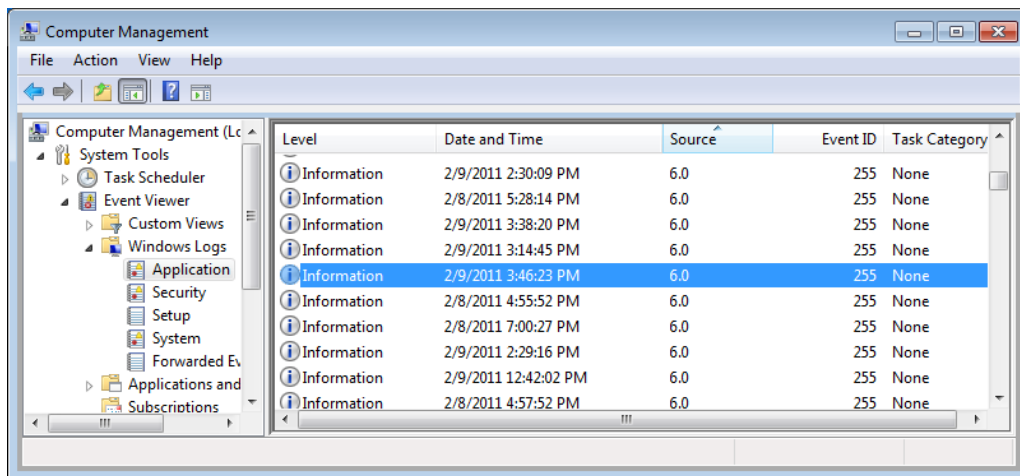


Here, you can define how the service should act in case of server failure. Access the service's properties by double-clicking OpenERP 6.1 in the list.



#### *Recovery tab to set service failure response*

The Computer Management logging service offers additional information about the execution of the OpenERP Server, for example, the startup or shutdown information of the service.



#### *Server information in Windows Logs list*

OpenERP Server runtime output can be found in the default logfile. Given that the server is now running as a Windows service, it does not output any runtime messages. For this, the logfile is the only option. Access it from the *Start* menu, through the *View log* link in the group of shortcuts for OpenERP 6.1. Alternatively, use the path `C:\Program Files\OpenERP 6.1\Server\openerp-server.log`.

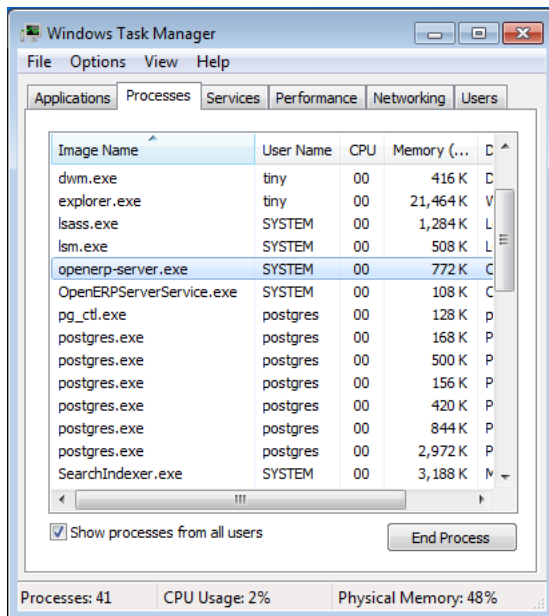
```

[2011-02-10 14:14:40,013][?] INFO:server:OpenERP version - 6.0.1
[2011-02-10 14:14:40,013][?] INFO:server:addons_path - C:\Program
Files\OpenERP 6.0\Server\addons
[2011-02-10 14:14:40,013][?] INFO:server:database hostname - localhost
[2011-02-10 14:14:40,013][?] INFO:server:database port - 5432
[2011-02-10 14:14:40,013][?] INFO:server:database user - openpg
[2011-02-10 14:14:40,013][?] INFO:server:initialising distributed
objects services
[2011-02-10 14:14:45,200][?] INFO:server:OpenERP version - 6.0.1
[2011-02-10 14:14:45,210][?] INFO:server:addons_path - C:\Program
Files\OpenERP 6.0\Server\addons
[2011-02-10 14:14:45,210][?] INFO:server:database hostname - localhost
[2011-02-10 14:14:45,210][?] INFO:server:database port - 5432
[2011-02-10 14:14:45,210][?] INFO:server:database user - openpg
[2011-02-10 14:14:45,210][?] INFO:server:initialising distributed
objects services
[2011-02-10 14:14:46,361][?] INFO:web-services:starting HTTP service at
0.0.0.0 port 8069
[2011-02-10 14:14:46,371][?] INFO:web-services:starting HTTPS service
at 0.0.0.0 port 8071
[2011-02-10 14:14:46,371][?] INFO:web-services:Registered XML-RPC over
HTTP
[2011-02-10 14:14:46,371][?] INFO:web-services:starting NET-RPC service
at 0.0.0.0 port 8070
[2011-02-10 14:14:46,371][?] INFO:server:Starting 3 services
[2011-02-10 14:14:46,381][?] INFO:server:OpenERP server is running,
waiting for connections...

```

### OpenERP Server log file

You can find out whether OpenERP is running by invoking *Windows Task Manager*. When you look at the *Processes* tab, you will see `OpenERPService.exe` and `openerp-server.exe`, both having `SYSTEM` as their user (to see these, *Show processes from all users* must be enabled in the Task Manager).



### The services in Windows Task Manager

## 10.5 Congratulations, you have successfully installed OpenERP Server

For more information, please take a look at *Additional Installation Information and Troubleshooting*, where you can find some troubleshooting examples.

# OPENERP CLIENT INSTALLATION

The native GTK client is available as a legacy interface for users who still require it, but the recommended way to access OpenERP 6.1 is the built-in web interface.

You must install, configure and run the OpenERP Server before using the OpenERP Client. The client needs the server to run. You can install the server application on your computer, or on an independent server accessible by network.

## 11.1 Downloading the OpenERP Client

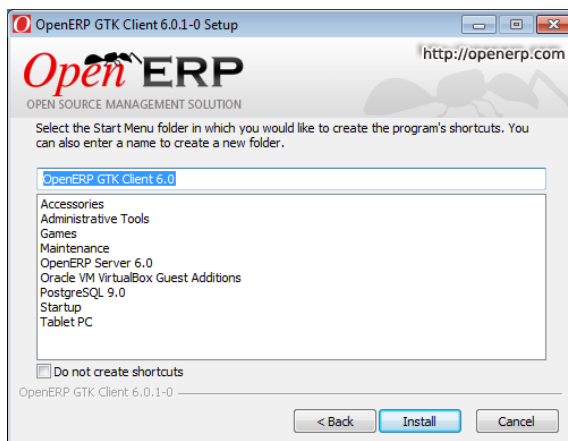
The OpenERP Client can be downloaded from [OpenERP website's download page](#).

Under *Windows Auto-Installer*, choose **Client** to download the OpenERP Client standalone.

## 11.2 Installing the OpenERP Client

Click the executable installation file you have just downloaded, and proceed with the following steps:

- 1. **Select installation language** The default is English. The other option is French.
- 2. **Welcome message** Carefully follow the recommendations given in this step.
- 3. **Licence Agreement** It is important that you accept the GNU General Public License to proceed with installation.
- 4. **Select folder for installation** By default, OpenERP Client is installed in C:\Program Files\OpenERP 6.0\Client. To install in a different folder, browse for a different location(folder) in this step.
- 5. **Create shortcuts** Select a folder in the *Start* menu where you would like to create the program's shortcuts.



#### *Create Start Menu Shortcuts*

- 6. **Install** The automatic installation of OpenERP Client begins and you can view its progress.
- 7. **Finish** On successful installation of OpenERP Client, you will get an appropriate confirmation. Click *Finish* to close the setup wizard.



#### *End of Configuration Wizard*

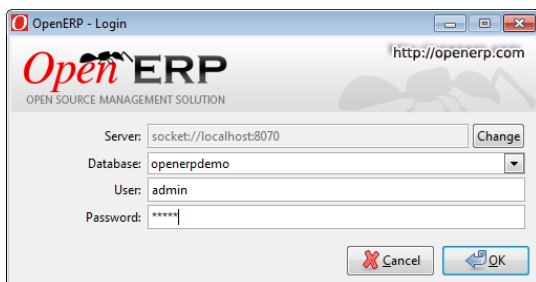
## 11.3 Starting the OpenERP Client

The installation program creates shortcuts in the main program menu and on the desktop, which you can use to start the client. Be sure to have an OpenERP Server running somewhere (on your computer or a distant server) to be able to use the client software.

Log in to `openerpdemo` database using default username and password:

- Username = admin
- Password = admin

Enjoy!



#### *Connecting to the Demo Database*

# OPENERP WEB INSTALLATION

As of OpenERP 6.1, the web client is included as part of the standard all-in-one installation, so no extra step is required to install it.

The all-in-one version may be downloaded from the [OpenERP website's download page](#)

## 12.1 Running the OpenERP Web Client

The OpenERP 6.1 web client is automatically available as soon as the OpenERP server is running. You can access it by connecting with your favorite web browser to the address and port of your OpenERP server, by default `http://localhost:8069`.

## 12.2 Supported Browsers

The OpenERP Web Client is known to work best with the latest version of Google Chrome or Mozilla Firefox. The following browsers are supported:

1. Google Chrome 9.0 or later
2. Firefox 4.0 or later
3. Safari 4.1 or later
4. Opera 10.0 or later
5. Internet Explorer 8.0 or later (later is strongly recommended)

**Note:**

*Contrary to OpenERP 6.0, no flash plugin is required to access the OpenERP 6.1 web interface*

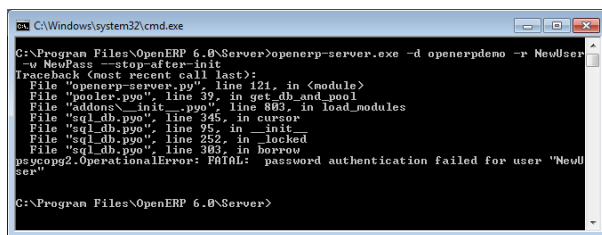


# TROUBLESHOOTING AND WINDOWS COMPLEMENTARY INSTALL INFORMATION

## 13.1 PostgreSQL Administration

### 13.1.1 OpenERP Server Connection Error with PostgreSQL

If you are initializing a database from the command-line with a custom username/role (-r) and password (-w), ensure that you have created a corresponding PostgreSQL user for the same. Otherwise you may encounter error messages as shown below:

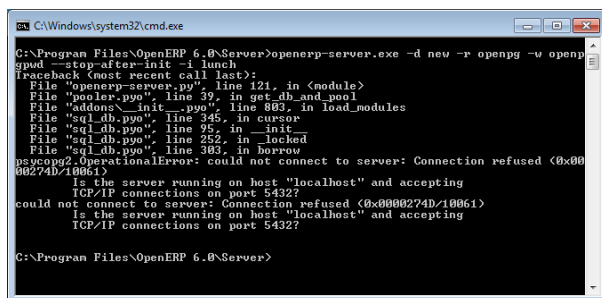


```
C:\Windows\system32\cmd.exe
C:\Program Files\OpenERP 6.0\Server>openerp-server.exe -d openerpdemo -r NewUser
-u NeuPass --stop-after-init
Traceback (most recent call last):
  File "openerp-server.py", line 121, in <module>
    File "pooler.pyo", line 39, in get_db_and_pool
    File "addons\__init__.pyo", line 883, in load_modules
    File "sql_db.pyo", line 345, in cursor
    File "sql_db.pyo", line 95, in __init__
    File "sql_db.pyo", line 252, in locked
    File "sql_db.pyo", line 383, in borrow
psycopg2.OperationalError: FATAL: password authentication failed for user "NewUser"

C:\Program Files\OpenERP 6.0\Server>
```

*User authentication failure*

You may also face another problem similar to this situation:

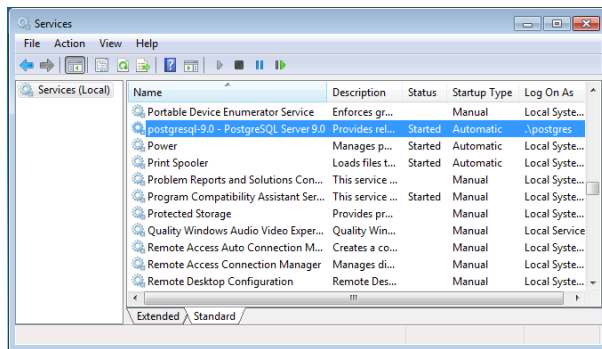


```
C:\Windows\system32\cmd.exe
C:\Program Files\OpenERP 6.0\Server>openerp-server.exe -d new -r openpg -u openpg
--stop-after-init -i lunch
Traceback (most recent call last):
  File "openerp-server.py", line 121, in <module>
    File "pooler.pyo", line 39, in get_db_and_pool
    File "addons\__init__.pyo", line 883, in load_modules
    File "sql_db.pyo", line 345, in cursor
    File "sql_db.pyo", line 95, in __init__
    File "sql_db.pyo", line 252, in locked
    File "sql_db.pyo", line 383, in borrow
psycopg2.OperationalError: could not connect to server: Connection refused (0x00000000/10061)
Is the server running on host "localhost" and accepting
TCP/IP connections on port 5432?
could not connect to server: Connection refused (0x00000000/10061)
Is the server running on host "localhost" and accepting
TCP/IP connections on port 5432?

C:\Program Files\OpenERP 6.0\Server>
```

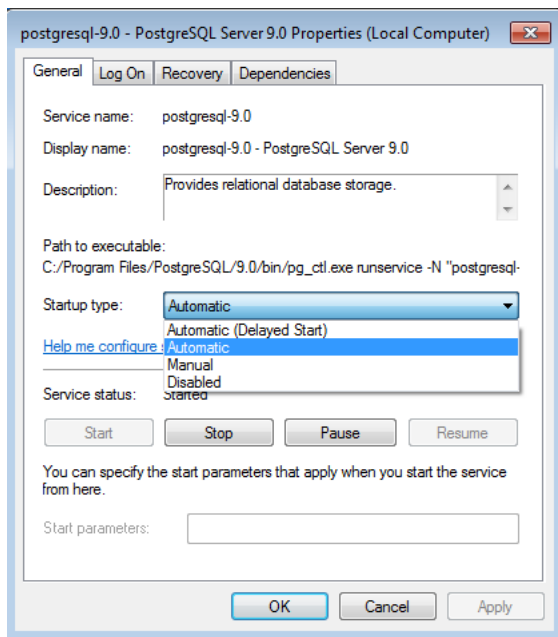
*Database connection failure*

In this case, check if the service postgresql-9.0 - PostgreSQL Server 9.0 is running in the Services Manager (*Control Panel → System and Security → Administrative Tools → Services*).



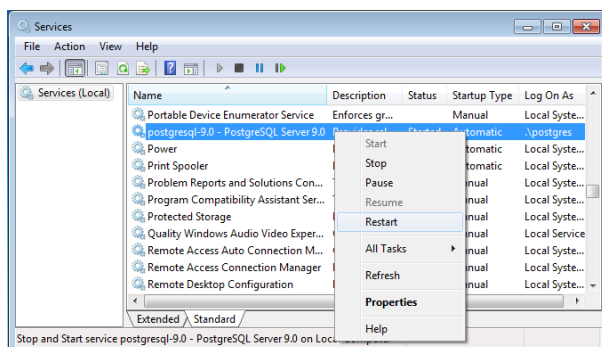
### PostgreSQL 9.0 in the Services list

You can edit the service configuration to start PostgreSQL as a service on system boot. This is usually the default.



### Configure PostgreSQL 9.0 service

If your PostgreSQL service is running, but you get connection errors, you can restart the service.



### Restarting the service



# UPDATING YOUR OPENERP INSTALLATION

## 14.1 Going to a Newer Minor/Patch Release

OpenERP's release policy states that minor/patch releases of the stable versions are usually published every month. These are recommended for production deployment, as they include the latest security updates and bugfixes, and do not require any migration process.

Of course you should always test these updates on a staging environment (copy of your production environment) before actually applying them on the real production systems.

For more details regarding the release cycle, have a look at the section *release\_cycle*.

Minor/patch releases of OpenERP are identified by an increasing 3rd release number, for example, v6.0.15 would be the 15th patch release of OpenERP v6.0.

**Note:**

*Minor Versions*

*You can skip minor versions, for example, you do not need to install all the intermediary versions between 6.0.6 and 6.0.15 if you need to upgrade an outdated installation, as long as you stay in the same version line (6.0 in this example).*

Updating an existing OpenERP installation to a newer patch release boils down to 2 operations:

- Install the new code over the existing one
- Synchronize each existing database with the new code

In order to accomplish this, the following step-by-step procedure should give you the best results:

1. Make a fresh backup of all existing databases, as well as a backup of the files of your OpenERP installation (server, web and addons), just in case.
2. Stop the OpenERP server and the Web Server (if present).
3. Update the source files to the latest release, or simply install the new releases over the previous ones. If need be, you can uninstall the previous version, but be sure to avoid uninstalling PostgreSQL, as this could delete your current databases!
4. Locate the separate server executable `openerp-server.exe` (this is not the executable used by the Windows Service!). It should be in the location where you installed OpenERP Server, for example in `C:\Programs\OpenERP 6.0\Server`.
5. From a Command-Line Prompt, start the server executable manually (directly call the executable you located above), with the following parameters, to trigger an update of all module data and views in the database, based on the new source files (include your usual startup parameters, if any, and replace `DB_NAME` with the name of the OpenERP database you wish to update):

```
openerp-server.exe -d DB_NAME -u all
```

6. Let the server complete its startup (watch the log file for the final message that says OpenERP server is running, waiting for connections or wait until you can connect to that database with a GTK client), then stop the server using the `Ctrl+C` key combination and repeat previous step for each database on this OpenERP installation (any database not updated will use the latest business logic but might have errors or missing improvements in the views until you update it using this procedure).
7. Stop the server again with `Ctrl+C` and restart it normally as a service.
8. Start the Web Server if present.
9. You can now proceed with the update of the GTK clients, which can be done separately by simply reinstalling the latest version over the previous one.

**Note:***Server*

*As an alternative to restarting the server in update mode for each database, as described above, you may try to start the server normally after installing the new version, and then connect to each database as the Administrator user, open the list of modules and manually trigger an update of the base module.*

*Because all modules depend on base they will be updated too. However this requires the Administrator password of each database and may not work for some updates, specifically when the update prevents you from logging into the system.*

**Tip:***Developer Book*

*For more technical details on the actual operations accomplished by the server during such an update, you may refer to the corresponding section in the Developer Book: `technical_update_procedure`.*

## 14.2 Going to a Newer Major Release

OpenERP's release policy states that one or two major releases are published from the development version every year. Transitioning to the next major release implies a lot more changes than jumping to another minor release. As the underlying OpenERP data structures usually evolve quite a bit from one major release to the next, a full migration of the existing data is needed. Each major release will be published with specific recommendations and procedures for upgrading an existing OpenERP system to the next major version.

**Note:***Major Release*

*For major releases, it is usually not possible to skip one release, for example upgrading directly from OpenERP 4.2 to OpenERP 6.0. If you need to do such an upgrade, you will simply have to do each intermediary upgrade one after the other.*

## **Part IV**

# **OpenERP Publisher Warranty Migration**



# HOW TO PROCEED FOR YOUR DATABASE MIGRATION?

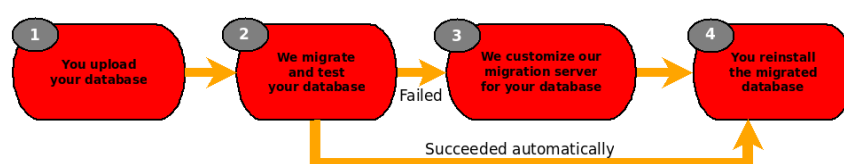


Figure 15.1: *Migration Process*

We describe below the 3 or 4 steps you must follow for your database migration. We suggest, as a best practice advice, to run this process at least twice (but you can do it as often as you want): the first time, after sending us your database, you will get it back migrated to the version of your choice. You will then have to do some tests, checking that the data and process are still correct and work normally. After your tests' validation, you are ready for effective migration. Send us an up-to-date version of your database. We will reapply the migration process and you will then get the migrated database to install and use in production.

We remind you, that you are in charge of your database cleaning, and that the migration warranty concerns all certified modules only. If you made some specific developments and want to keep them, be sure that they are grouped in a certified module. (For further information, have a look at our OpenERP Publisher's Warranty or contact our technical team at [support@openerp.com](mailto:support@openerp.com) or +32 81 81 37 00 if you want to certify your modules.)

## 15.1 Migration Process

- **Step 1: You upload your database**

Create a backup of your database and upload it. You can anonymize your data before uploading the database. For further information, see [How to restore a database?](#) and [How to keep your data confidential?](#).

- **Step 2: We migrate and test your database**

Once we receive your database, we run our migration process and test your database.

- If the migration process ended without any problem, you will receive an email within a few hours, with a link where you can download your migrated database. You may then go directly to step 4.
- If the migration process does not end automatically, you will receive an email within a few hours, explaining that the migration process encountered some difficulties and that a manual intervention is necessary. More details are available in step 3.

- **Step 3: We customize our migration process to your database**

Our migration process is automated as much as possible, but some manual work may be necessary, depending on your data's complexity. It is possible, during step 2, that the migration process did not complete correctly and that we need to customize our scripts for your database. This operation may take 2-4 weeks,

depending on the complexity of your database. After the migration script adaptation, you will receive an email with a link where you can download your migrated database.

- **Step 4: You reinstall the migrated database**

You can download your migrated database and reinstall it on your new OpenERP version. If you executed the anonymisation process at step 1, you will have to reverse it to recover your real data.

## 15.2 How to restore a database?

As a super-administrator, you have rights to create new databases, and can also:

- backup databases,
- delete databases,
- restore databases.

All of these operations can be carried out from the menu *File* → *Databases...* in the GTK client, or from the *Databases* button in the web client's *Login* screen.

**Tip:***Backup (copy) a Database*

To make a copy of a database, go to the web Login screen and click the *Databases* button. Then click the *Backup* button, select the database you want to copy and enter the super-administrator password. Click the *Backup* button to confirm that you want to copy the database.

**Tip:***Drop (delete) a Database*

To delete a database, go to the web Login screen and click the *Databases* button. Then click the *Drop* button, select the database you want to delete and enter the super-administrator password. Click the *Drop* button to confirm that you want to delete the database.

**Tip:***Restore a Database*

To restore a database, go to the web Login screen and click the *Databases* button. Then click the *Restore* button, click the *Choose File* button to select the database you want to restore. Give the database a name and enter the super-administrator password. Click the *Restore* button to confirm that you want to install a new copy of the selected database. To restore a database, you need to have an existing copy, of course.

**Tip:***Duplicating a Database*

To duplicate a database, you can:

1. make a backup file on your PC from this database.
2. restore this database from the backup file on your PC, and give it a new name.

This can be a useful way of making a test database from a production database. You can try out the operation of a new configuration, new modules, or just the import of new data.

A system administrator can configure OpenERP to restrict access to some of these database functions so that your security is enhanced in normal production use.

## 15.3 How to keep your data confidential?

We offer an option to anonymise your data through our `anonymization` module. This module allows you to keep your data confidential for a given database. This process is useful if you want to use the migration process and protect your own or your customers' confidential data. The principle is that you run an anonymization tool which will hide your confidential data (they are replaced by 'XXX' characters). Then you can send the anonymized database to the migration team. Once you get back your migrated database, you restore it and reverse the anonymisation process to recover your previous data.

We suggest you to work on a copy of your database, so be sure to make a backup before starting the anonymisation process.

The first step is to install and configure the `anonymization` module. The menus are located in *Administration* → *Database anonymization*.

### 15.3.1 Anonymization History

This is the history of all the anonymisation (and the reverse process) that occurred on a particular database.

### 15.3.2 Anonymize database

This is the wizard that will actually anonymise the database. This wizard is also responsible to reverse the anonymization process.

### 15.3.3 Anonymized Fields

#### Pre-defined fields

On module installation, OpenERP will create some fields considered as important to anonymise, these are:

- Partner: Name
- Partner: Reference
- Partner Addresses: Contact Name
- Partner Addresses: City
- Partner Addresses: Street
- Partner Addresses: Street2
- Partner Addresses: Zip
- Partner Addresses: Phone
- Partner Addresses: Fax
- Partner Addresses: Mobile
- Partner Addresses: E-Mail
- Invoice: Untaxed (`amount_untaxed`)
- Invoice: Tax
- Invoice: Total (`amount_total`)
- Invoice: Total (`check_total`)
- Invoice: Residual
- Invoice line: Unit Price
- Invoice line: Subtotal

- Invoice move line: Debit
- Invoice move line: Credit
- Invoice move line: Tax/Base Amount
- Invoice move line: Amount Currency
- Invoice move line: Taxed Amount
- Sale order: amount\_tax
- Sale order: amount\_untaxed
- Sale order: amount\_total
- Sale order line: price unit
- Sale order line: discount
- Purchase order: amount\_tax
- Purchase order: amount\_untaxed
- Purchase order: amount\_total
- Purchase order line: price\_unit

The anonymised values are:

- char field: xxx + record id
- text field: xxx + record id
- selection field: xxx + record id
- integer field: 1
- float field: 0.0
- date field: 2011-11-11
- datetime field: 2011-11-11 11:11:11

All attachment object contents are replaced by an empty string in the database.

### **Create new fields to anonymize**

You also have the possibility to add other fields that you want to keep confidential. You have to create them manually.

First choose an object by using the popup (*Object* field). You can also enter the object model name directly into the *Object Name* field, if you know it. These two fields are linked to each other; fill out one of both and the other one will be filled automatically.

You then choose the field by using the popup (*Field* field). You can also enter the field name directly if you know it (*Field Name* field). These two fields are linked to each other in the same way as described above.

The *State* field values are:

- *Clear*: the field values have their original status in the database
- *Anonymized*: the field values are anonymised in the database
- *Not Existing*: the field does not exist in the database. This is probably a field which comes from the module's data file. For example, the data file creates some predefined anonymized fields, but the module might not be installed. These fields are ignored by the anonymisation process.



# INDEX

## A

access, 62

## D

database

- backup, 62
- drop, 62
- duplicate, 62
- restore, 62

## I

Installation, 5

- OpenERP All-In-One (Windows), 37
- OpenERP Client (Linux), 25
- OpenERP Client (Windows), 50
- OpenERP Server (Linux), 22
- OpenERP Server (Windows), 44
- OpenERP Web (Linux), 29
- OpenERP Web (Windows), 52
- PostgreSQL, 17
- PostgreSQL (Windows), 41
- Windows installation quirks, 53

installation

- administrator, 39
- Windows (all-in-one), 39

## O

OpenERP All-In-One

- Installation (Windows), 37

OpenERP Client

- Configuring a PDF viewer, 28
- Installation (Linux), 25
- Installation (Windows), 50

OpenERP Server

- Installation (Linux), 22
- Installation (Windows), 44

OpenERP versions, 39

OpenERP Web

- Installation (Linux), 29
- Installation (Windows), 52

## P

PDF viewer, 28

## PostgreSQL

- Installation, [17](#)
- Installation (Windows), [41](#)
- setup a database, [19](#)
- setup a database (Windows), [43](#)
- setup a user, [19](#)
- setup a user (Windows), [43](#)

## U

### Update

- Upgrade
  - OpenERP (Linux), [31](#)
  - OpenERP (Windows), [56](#)