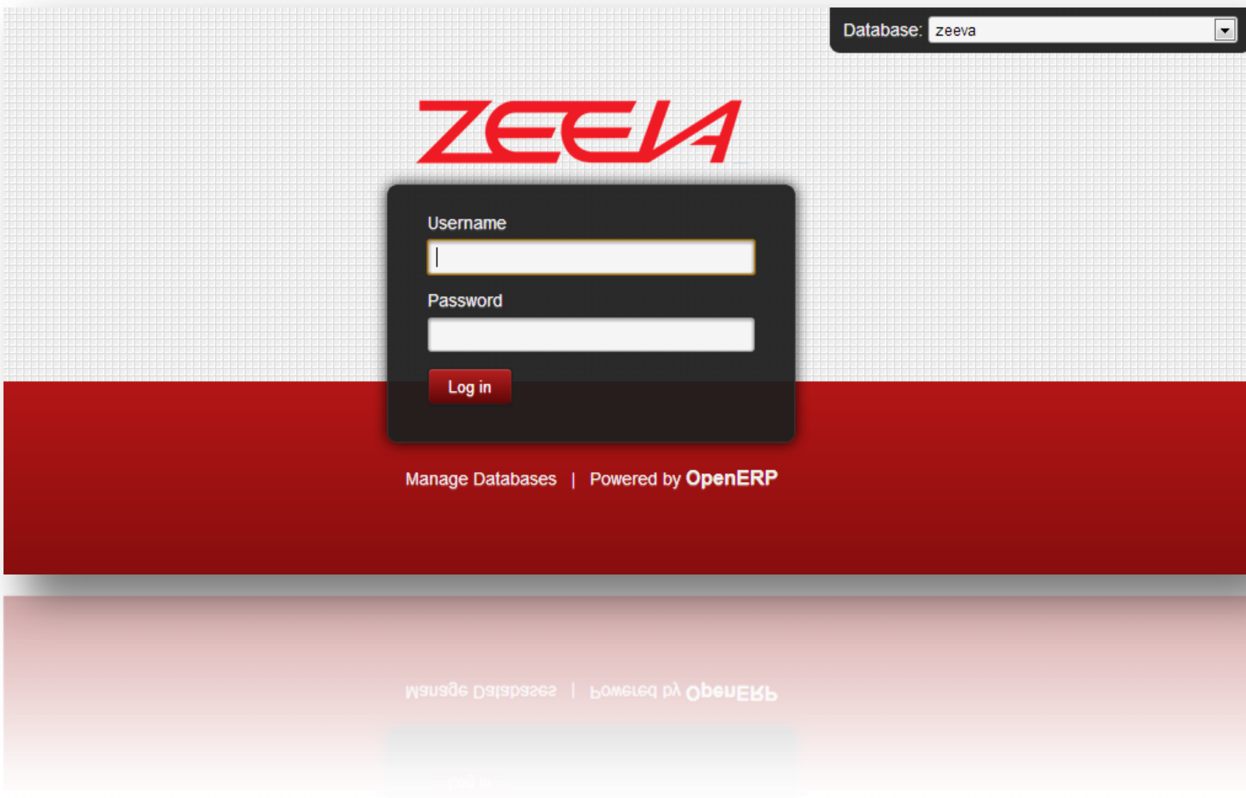
Zeeva International Ltd

[Version 2.0]



[ERP User Manual]

Operation manual for Zeeva International users of the ERP system based on the open source solution OpenERP. All functionalities are described.

Revision History

Version	Date	Author	Revision Description
1.0	08/10/2012	Quentin PELLÉ	Document creation
2.0	25/03/2013	Quentin PELLÉ	Document migration to OpenERP 7.0

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1. INTRODUCTION

This document aims to describe all the functionalities of an ERP system customized for Zeeva International Limited. This system is based on the open source solution OpenERP, world leader in the domain of open source ERPs for SMEs.

In this operation manual, we will review all the steps required to drive each process to the end and how to benefit from the system for all the daily tasks.

Attention must be paid to all protocols listed in this manual. If not, the quality of information within the database will suffer and serve no benefit to the company.

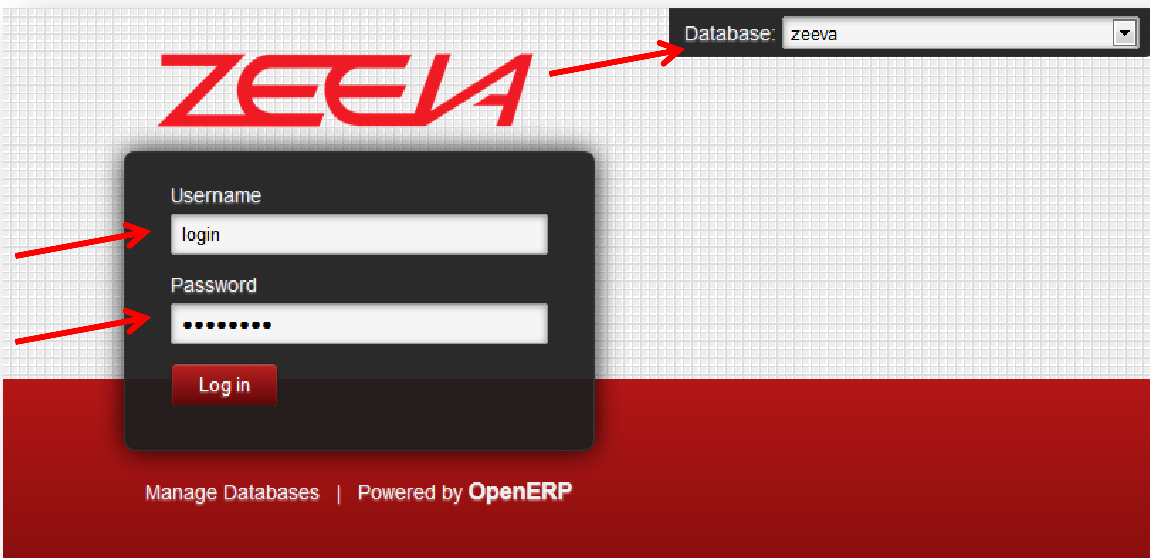
2. GENERALITIES

You can access to the server from any web-browser at this address: erp.zeeva.com:8069

It is working from any tablet/smartphone/computer with an internet connection. Recommended browsers are Google Chrome and Mozilla Firefox.

Login screen

The first screen allows you to select a database and enter your logins.



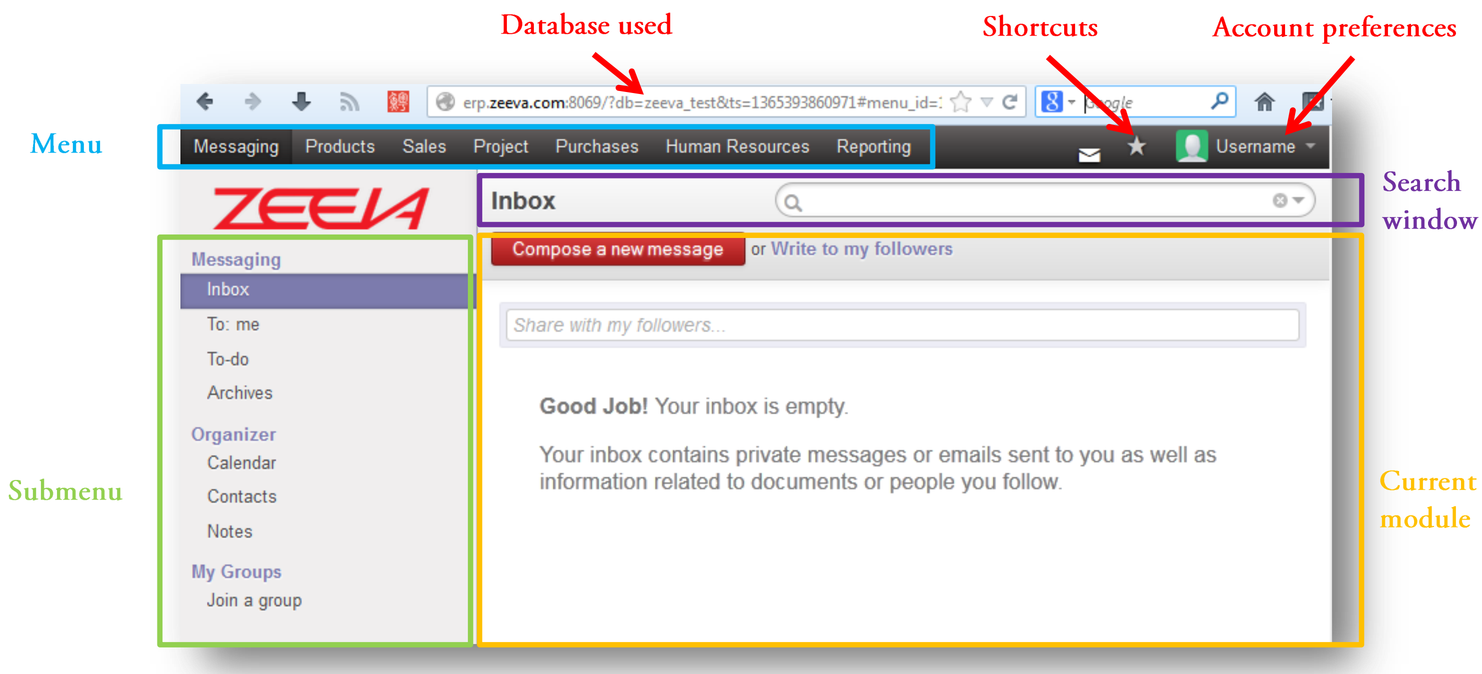
Databases:

- **zeeva**: it is the real database in where you will manage the real work (projects, SC, PO, SI, customers, suppliers, products, etc…),

- **zeeva_test**: it is a copy of the database "zeeva" for testing purpose only. Here you can try anything/any function, [buttons], reports, etc… and practice without worrying about mixing up the real database. This database will be erased and rebuilt weekly.

User interface

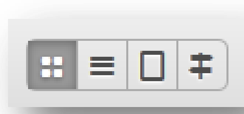
Once logged in, you will arrive on the homepage:



Controls, shortcuts and menu buttons are in the header of every page for easy access and management.

At any time you can see which database is used by checking the internet address. For example here it is: erp.zeeva.com:8069/?db=zeeva_test&……

View switching

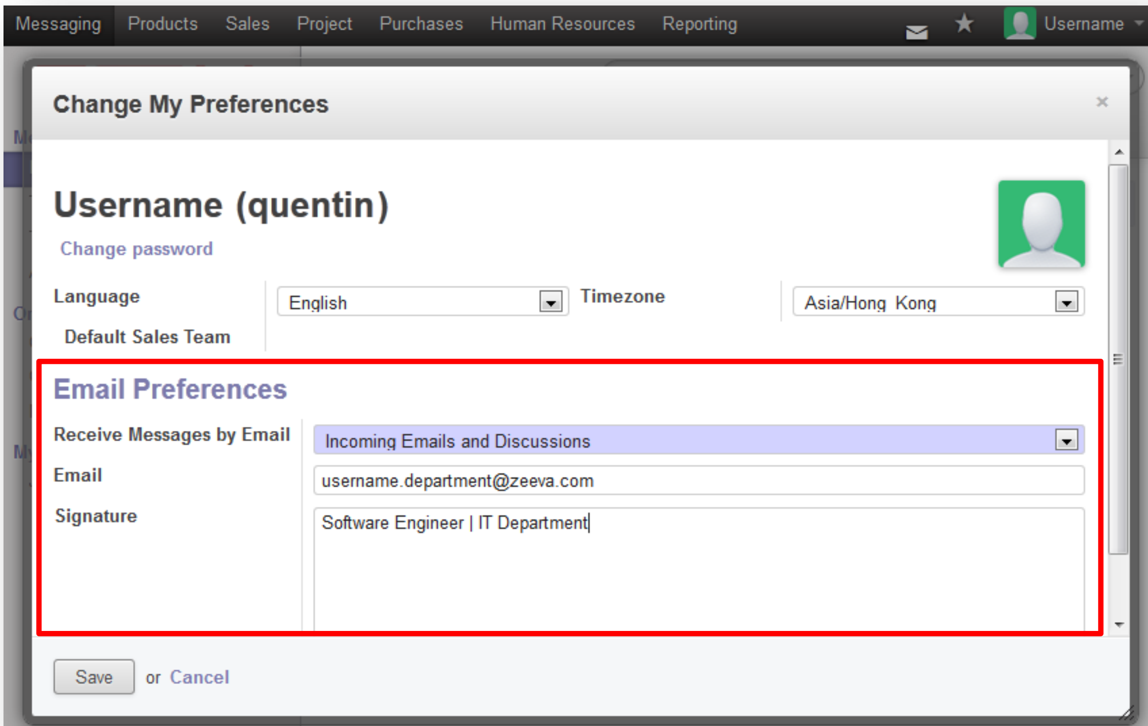


You can switch between views: Kanban (box), tree, form, calendar, Gantt, graph…

Account preferences

Change your details

On the top right corner, click on your **Username** > **Preferences**:



Change your password

On the top right corner, click on **Username** > **Preferences** > **[Change password]**

A password is a critical data. Since the software is accessible from internet, it is your duty to use a strong password with a minimum of 4 letters and 2 numbers. For example: Z33v4ltd

Once you have changed your password, you will need to refresh the page and log in again.

Messaging and OpenChatter

OpenERP 7.0 feature a new way to communicate inside the company. The Social Network App is based on the OpenChatter engine and has the following main characteristics:

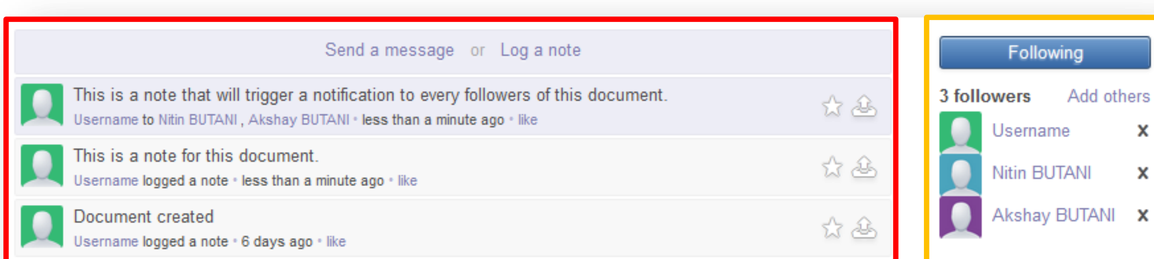
- ✓ facilitates conversations with internal users or external ones (customers, suppliers,...), joining the power of instant messaging with standard emails ;
- ✓ organize groups of discussions, an alternative to traditional mailing lists ;
- ✓ extends the breadth of these conversations to incorporate discussions around and about business documents ;
- ✓ incorporates a subscription system to any business event, generating notifications ;
- ✓ displays all the messages and notifications in a threaded manner on the user's unified feeds page.

The conversation feature

OpenChatter provides a simple communication tool to discuss amongst colleagues or external contacts, either with an individual or with a group.

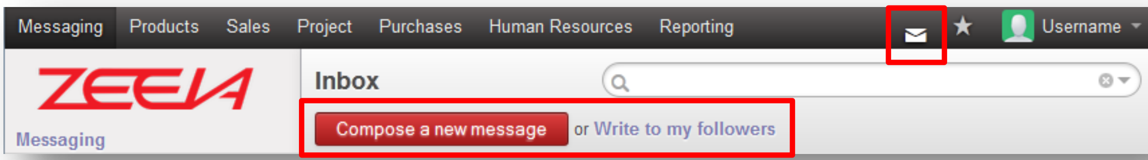
Two mechanisms are provided to discuss or exchange documents: a real time chat or an asynchronous messaging that provides an alternative to emails.

On most of the modules, when you open a document you can see the OpenChatter area sitting at the bottom. The left part shows the discussion while the right part lists the follower of this document.

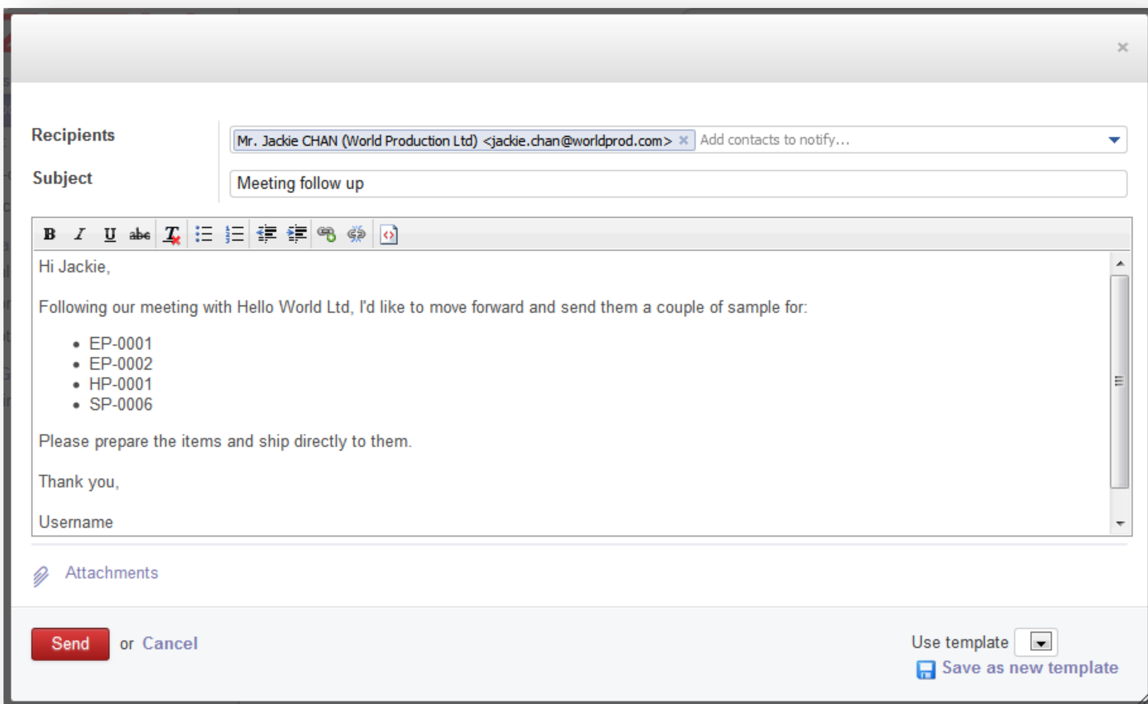


Messaging

There are two shortcuts to send a direct message to one or more users:



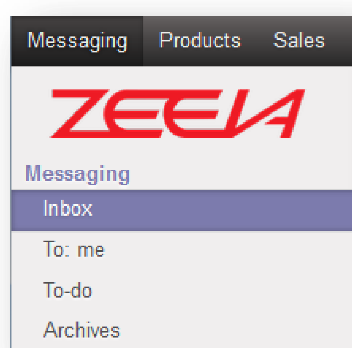
A form will pop-up:



OpenERP differentiates itself through:

- ✓ Messages **"for information"**: you can pull them when you need specific information, they do not require to be read every day. You receive only what you decided to follow. It's 90% of your daily emails. You can read them from the « **Inbox** » menu.

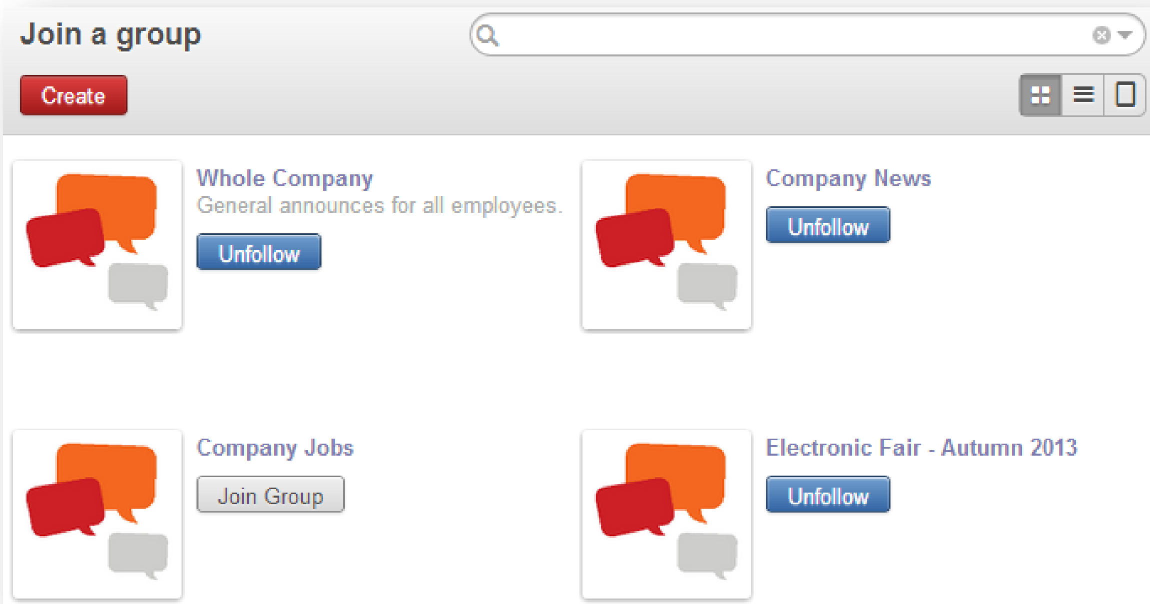
- ✓ Messages **"for action"**: they require your immediate attention; you need to process them all. You can read them from the « **To: me** » menu.



Groups and mailing lists

Discussions can be organized into groups. You can create groups of discussions for any purpose, for example "Electronic Fair - autumn 2013", "AI tips", "Christmas dinner", etc…

Users can write messages to a group, attach documents to their messages, answer previous threads, vote on others messages and search in the history of all conversations. Users can join or be invited on groups. If they do so, they will receive every discussion concerning these groups into their inbox. Depending on the privacy of the group, you can also read the archives of the group, even if you decided to not follow this group.



You can configure the privacy of each group as:

- ✓ **Public**: everyone can see messages related to this group, including your customers and/or suppliers through their portal. Example of public groups: "Company News", "Jobs", "Next Events", etc…;
- ✓ **Private**: only followers of this group can see the messages. In order to become a follower, you need to be invited by an existing follower. Example of private groups : "Board Members", "HR", "Private Customer Project Y" ;
- ✓ **Selected Groups Only**: allows selecting groups of users that can access related messages. Example: "All Employees", "Sales Only", "Customers Only".

Your inbox is a stream, enabling you to take actions

OpenERP’s messaging system is a real alternative to traditional emails. Users can to take back control of their inbox by easily processing every incoming message in one click. OpenERP's inbox is between a traditional email inbox and a todo list, where you process every item to empty the list.

When you process your inbox, you can take five immediate actions in one click on a message or on a whole thread at once:

- ✓ Inline reply makes replying to a message fast and easy. You do not need to write a subject, lose the context, find recipients, etc. ;
- ✓ You can mark a message as a todo. It's removed from your inbox and put in a todo list for later process ;
- ✓ You can archive/mark as read the message to remove it from the inbox ;
- ✓ You can mark your agreement on a message in one click, with the “Like” button ;
- ✓ You can jump to the related document to take action on the business document (like confirming a sale order or approving a leave request).

This way you can process your inbox and take actions very quickly.

Conversations around business documents

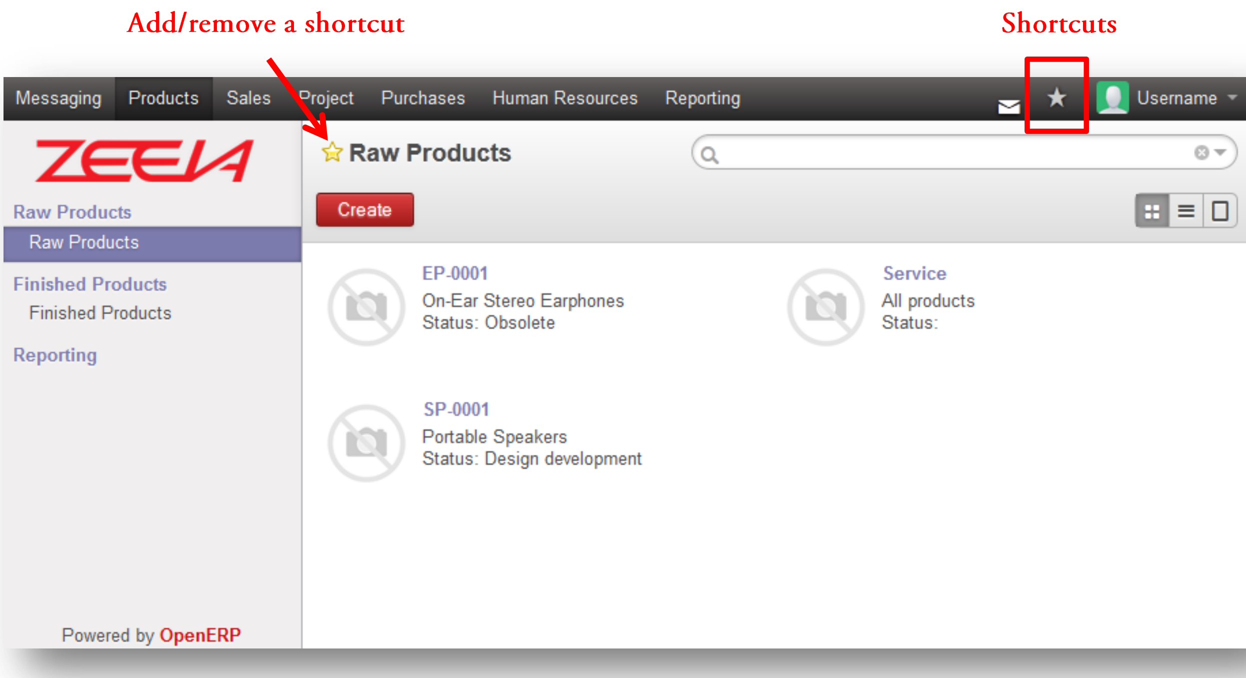
TODO

Users can follow what is of interest to them

TODO

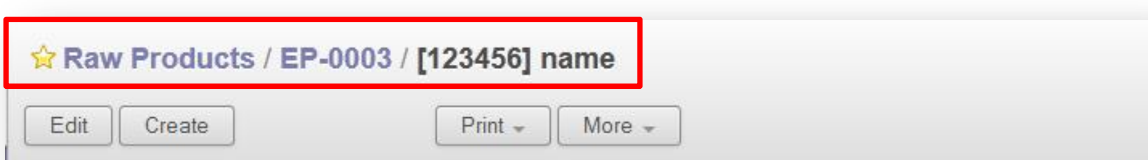
Manage your shortcuts

To add/remove a shortcut from the shortcut list, just go to the page you want to shortcut and click on the little yellow [star] on top of the page to activate/deactivate it.



Once you have refreshed the page, shortcuts are displayed by alphabetical order.

Breadcrumbs navigation

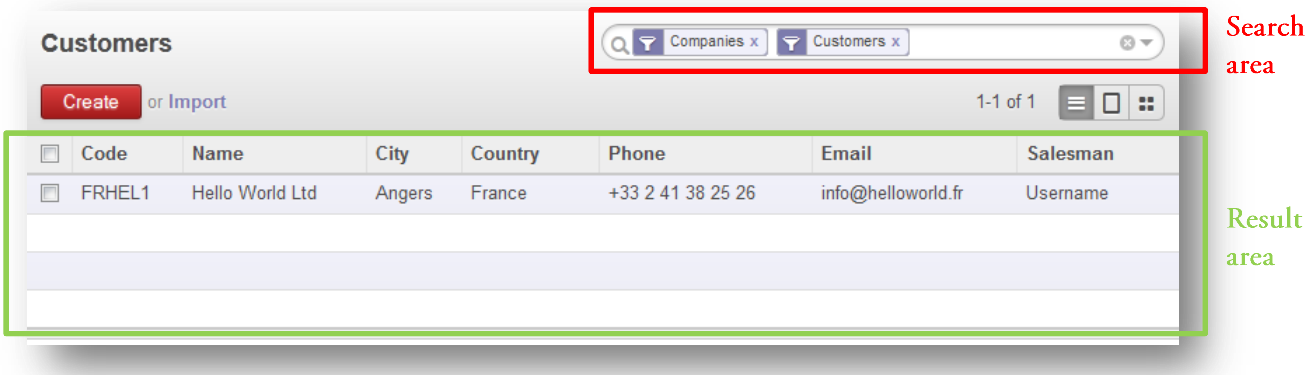


Breadcrumbs allow users to keep track of their locations. They provide links back to each previous page/module the user navigated through to get to the current page.

3. CUSTOMER MANAGEMENT

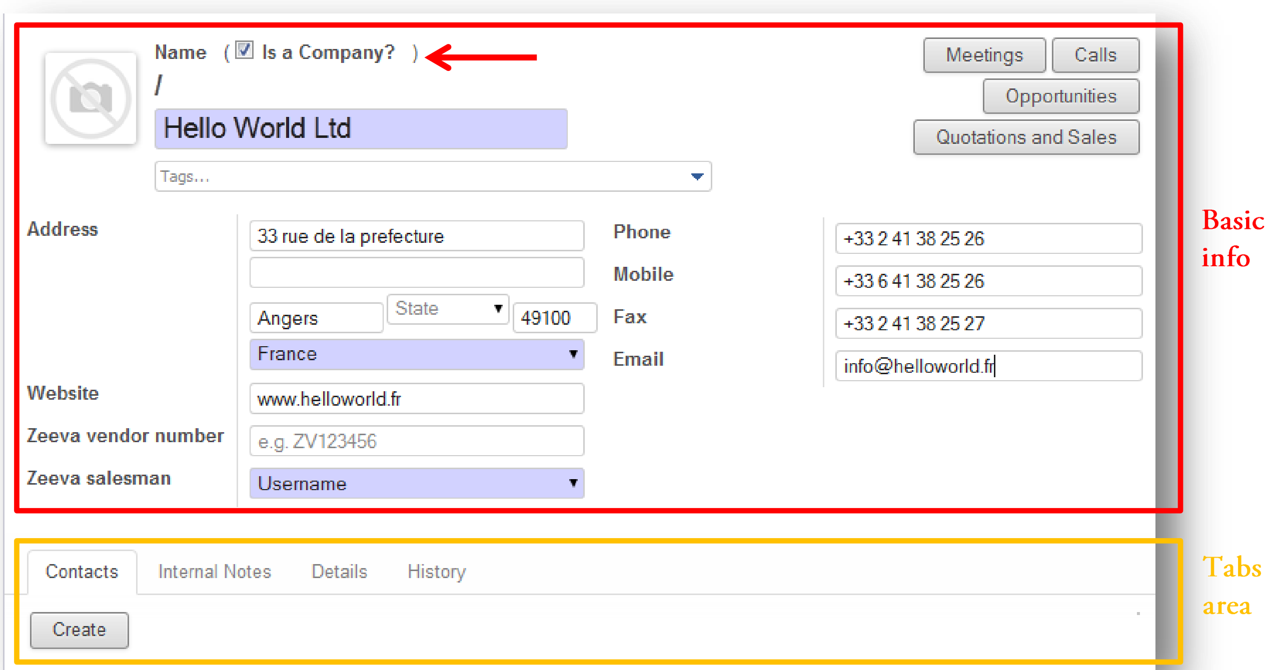
Access

Go to **Sales** > **Customers** > **Customers** you will get the list view:



Create a new customer

Click on [create], it will open the form page:

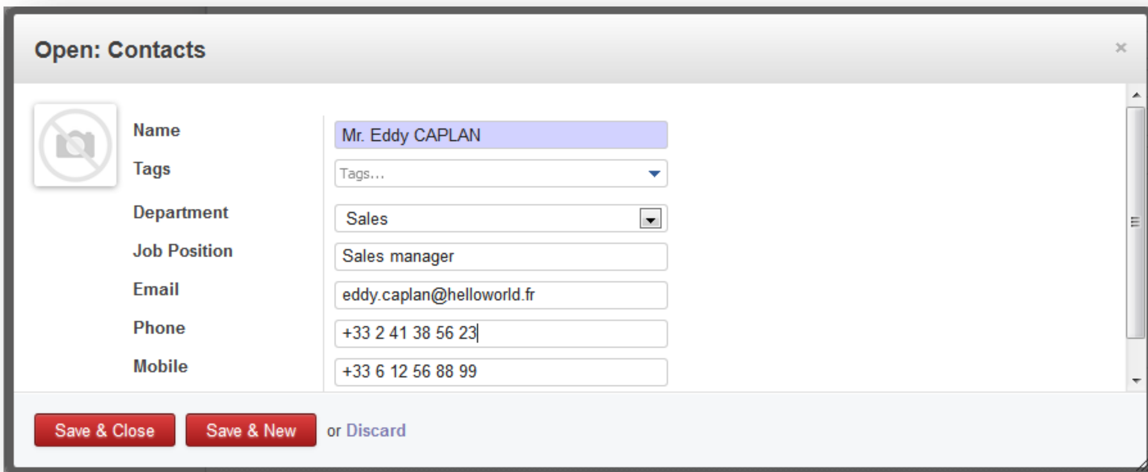


Basic info area: input customer name, address, website, phones and vendor number if you have checked the box "Is a Company".

Customer code is automatically generated, you cannot change it.

Tabs area: 4 tabs to enter more specific details about the customer:

- ✓ Contacts: click on [edit] to start editing the customer, then click on [create] to add a new contact.

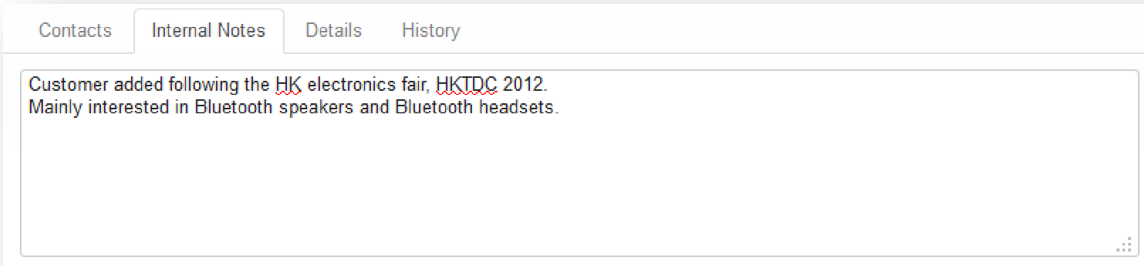


You can create as many contacts as you need for each customer.

Basic rule: only the first letter of a proper noun can be in capital, except for last names and abbreviations. Put the gender (Mr. or Ms.) directly in the field name.

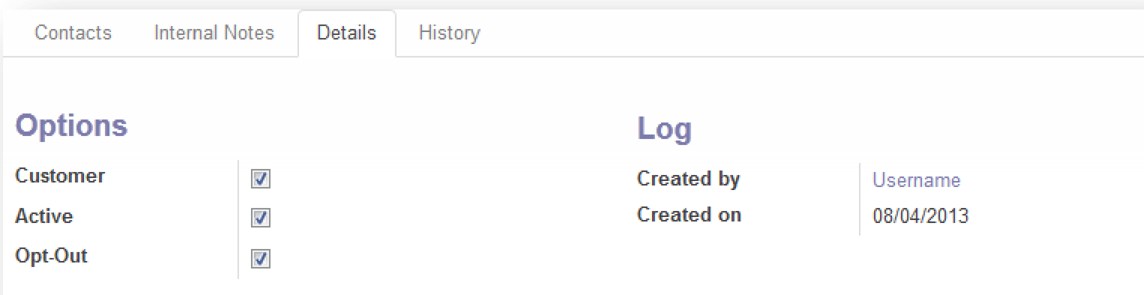
The information entered here will be used on every future document (SC, invoices…), so be sure you are inputting accurate data.

✓ Internal notes tab



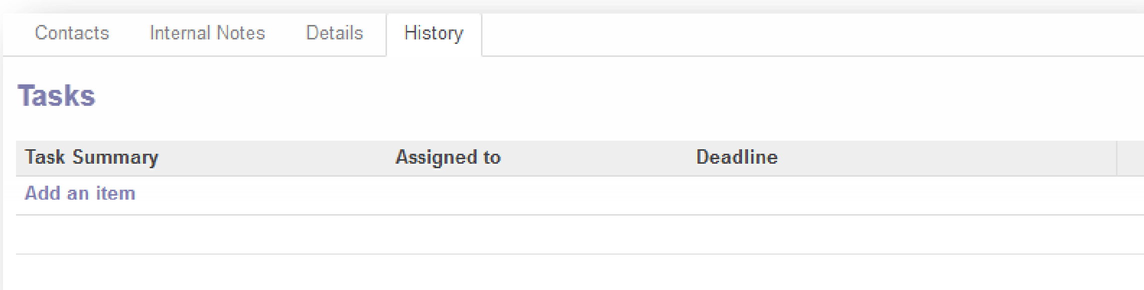
✓ Details tab

If opt-out is checked, this contact won't receive automatic emails for the system. (Do not uncheck).



✓ History tab

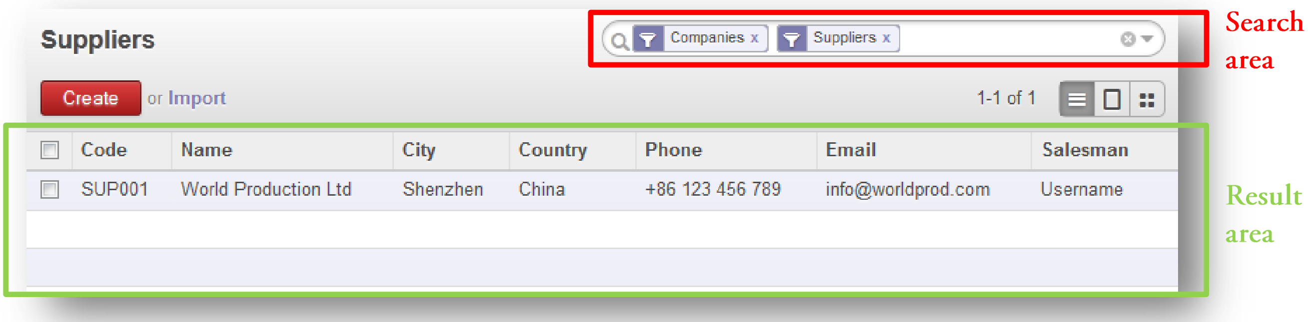
For later use.



4. SUPPLIER MANAGEMENT

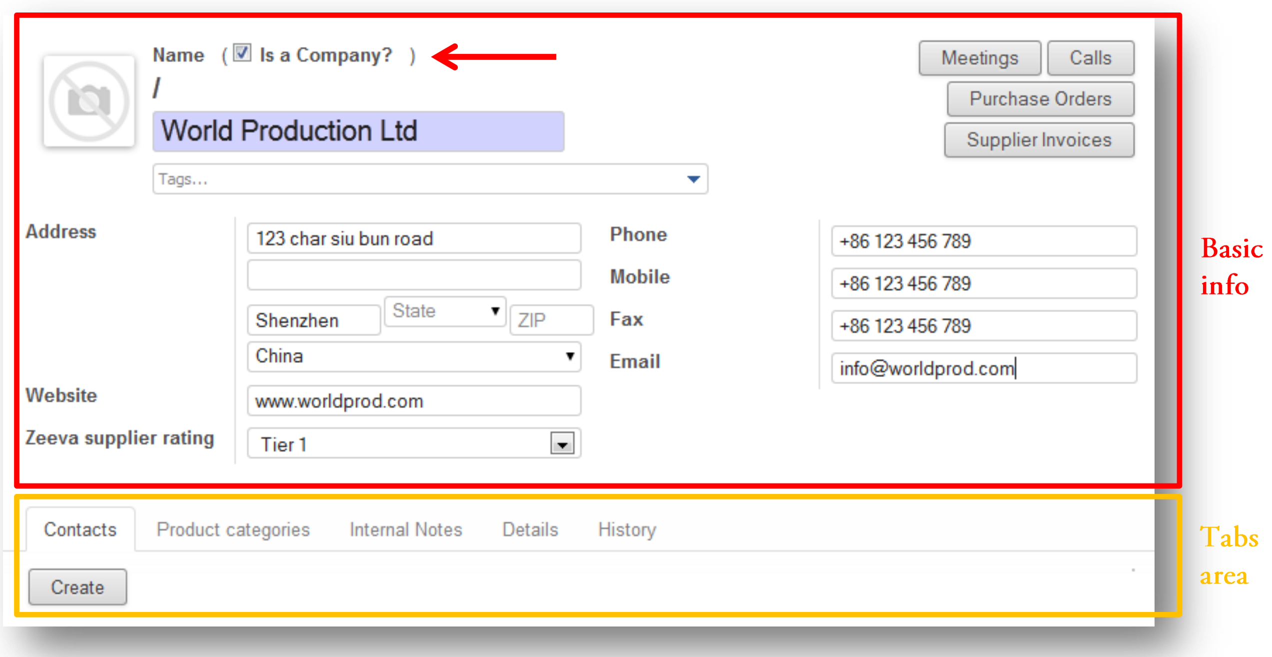
Access

Go to **Purchases** > **Suppliers** > **Suppliers** you will get the list view:



Create a new supplier

Click on [create], it will open the form page:

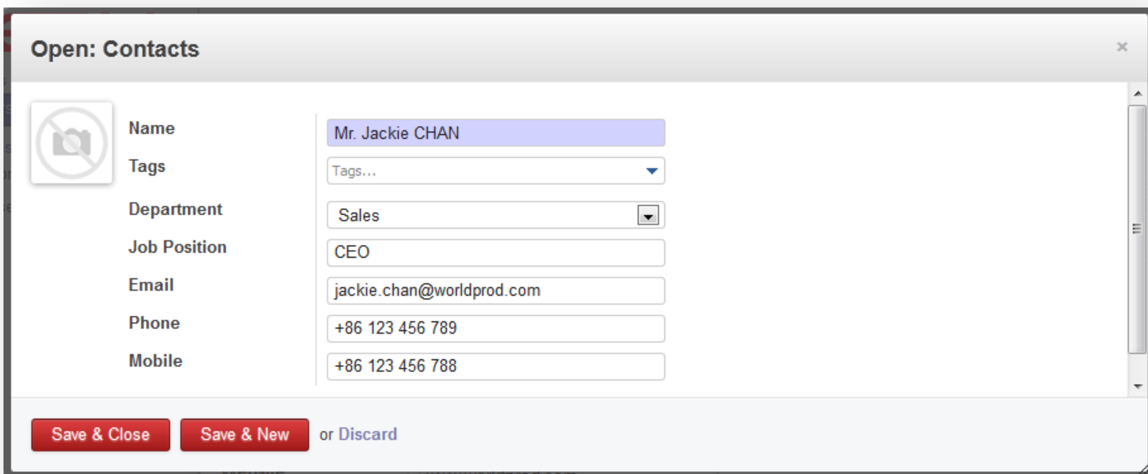


Basic info area: input supplier name, address, website, phones and select rating if known.

Supplier code is automatically generated, you cannot change it.

Tabs area: 5 tabs to enter more specific details about the supplier:

- ✓ Contacts: click on [edit] to start editing the customer, then click on [create] to add a new contact.



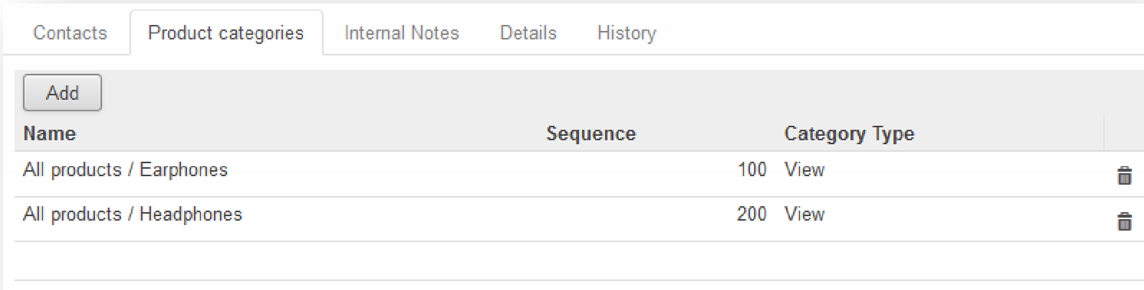
You can create as many contacts as you need for each supplier.

Basic rule: only the first letter of a proper noun can be in capital, except for last names and abbreviations. Put the gender (Mr. or Ms.) directly in the field name.

The information entered here will be used on every future document (SC, invoices…), so be sure you are inputting accurate data.

- ✓ Product categories tab

Here you can select which categories of product are made by this supplier.

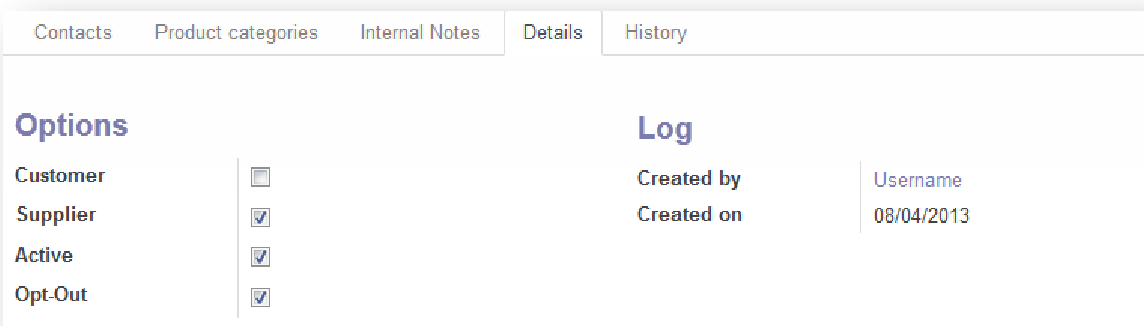


- ✓ Internal notes tab

Some notes about this supplier.

- ✓ Details tab

If opt-out is checked, this contact won't receive automatic emails for the system. By default, do not uncheck this box.



- ✓ History tab

For later use.

5. Raw products

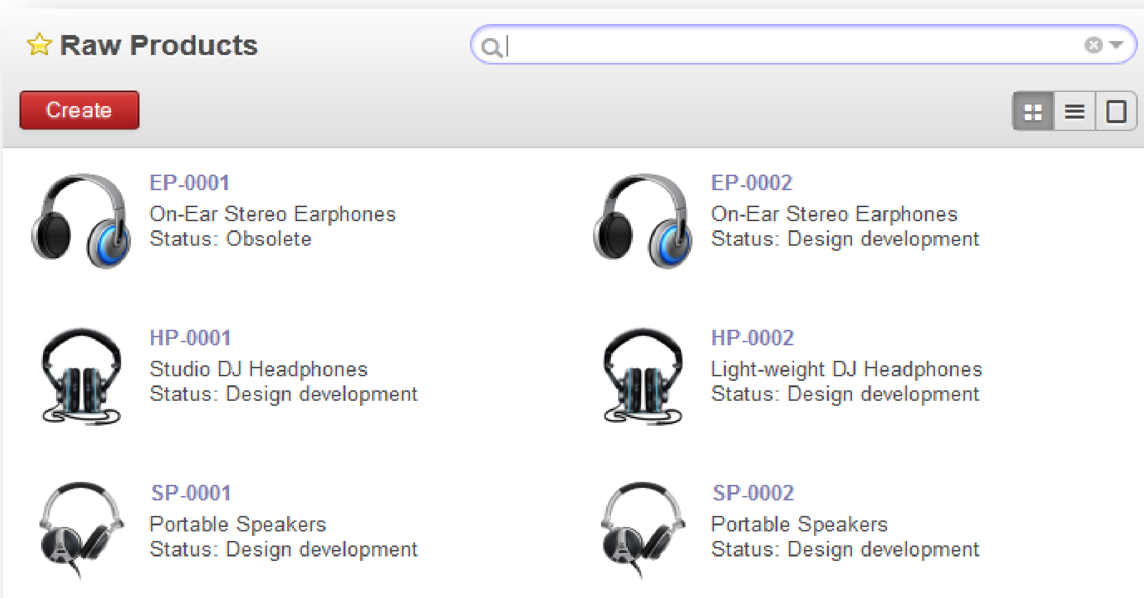
Definition

The term "raw product" refers to an idea or a concept of new product. It has been or will be hand-sampled by a factory and samples pictures are saved in the ERP to help others to understand the concept.

It is referenced by a unique code automatically generated and used by everyone. Its characteristics are not fixed although it has a default set of them as reference. A raw product exists to generate child products, known as "finished products".

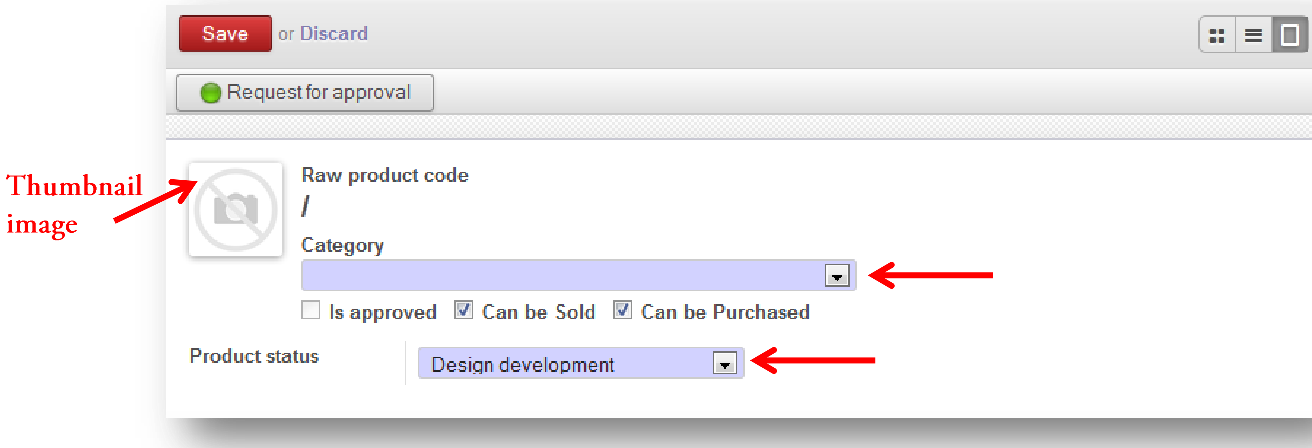
Access

Go to **Products** > **Raw products** > **Raw products** you will get the Kanban view:



Create a new raw product

Click on [create], it will load the form:

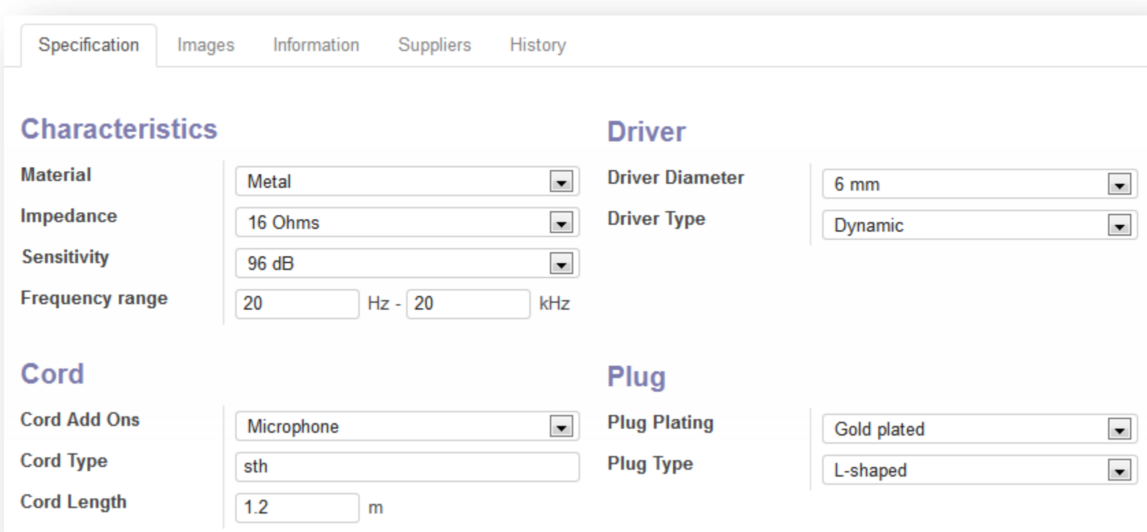


First, you need to choose the product category and the product status. It will load the related specification in the first tab.

<u>Checkboxes</u>:

- ✓ *Is approved*: automatically checked when the product is approved by management, you can't modify it;
- ✓ *Can be Sold*: check if the product aims to be sold;
- ✓ *Can be Purchased*: check if the product will be purchased from a factory.

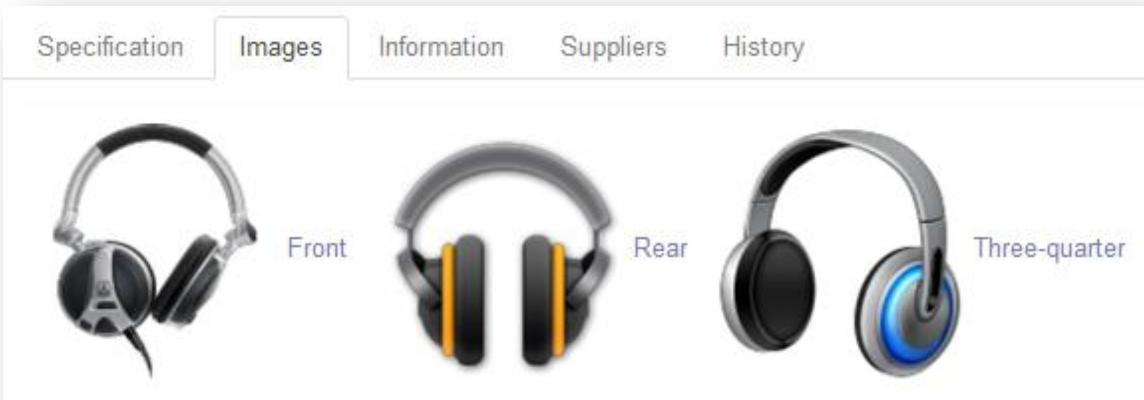
- ✓ Specification tab



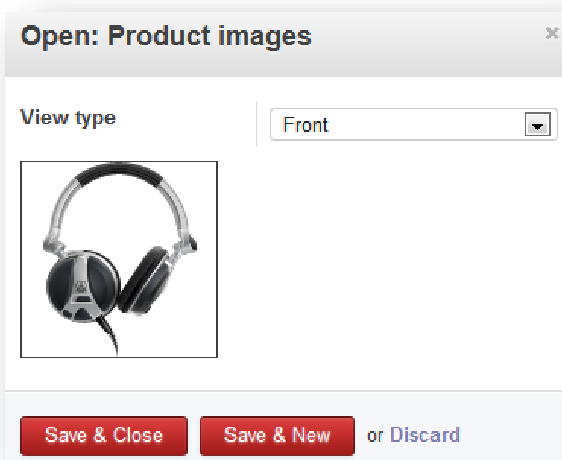
Raw product code is automatically generated based on the product category selected, so you cannot change it.

- ✓ Images tab

You can add several images to the gallery:



To add an image, click on [create]:



Images will show up only once you have clicked [save] the product.

- ✓ Information tab

Specific details about the product (later use).

- ✓ Suppliers tab

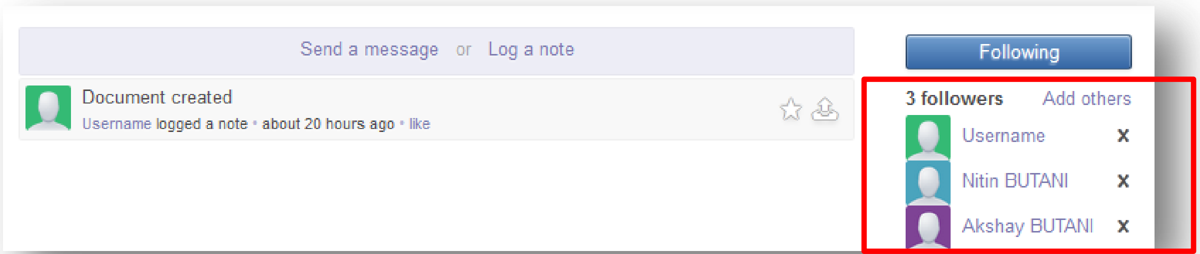
Here you can record prices offered by different suppliers for this raw product.

- ✓ History tab

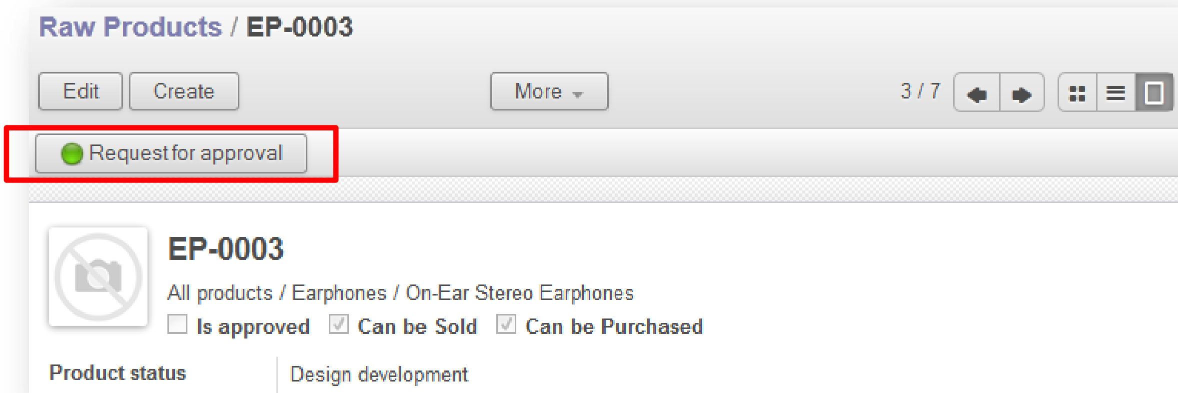
For later use.

Request for approval

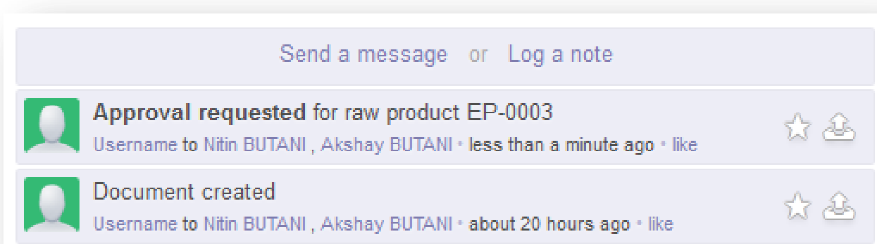
Once you have finished editing the raw product characteristics and it has been saved, you can see that the product is followed by default by managers:



On the top part of the product page, you can see a button to request for approval:

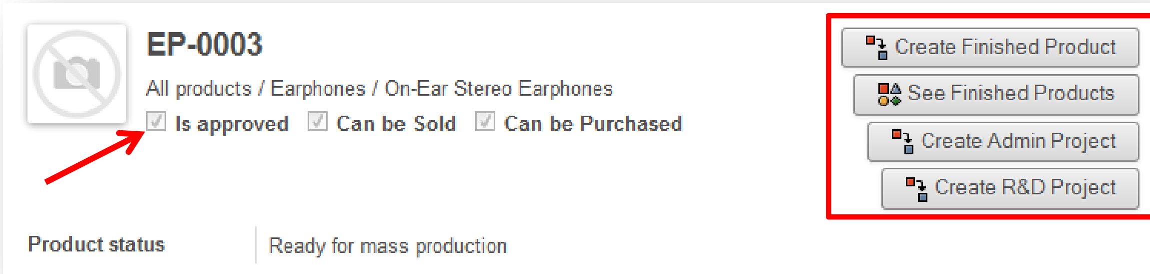


Once you have clicked on the button, you will see in OpenChatter log:



The product is waiting for approval from management.

Actions available once approved



Once a raw product has been approved, several actions become available:

- ✓ Create a finished product: it will open the finished product form and import all the fields from the current raw product.
- ✓ See all the existing finished products based on this raw product
- ✓ Create an admin project (for later use)
- ✓ Create a R&D project (or later use)

Most of the fields of an approved raw product are read-only so you cannot edit them without prior consent from management.

6. FINISHED PRODUCTS

Access

TODO

Create a new finished product

TODO

Create a finished product directly from a raw product

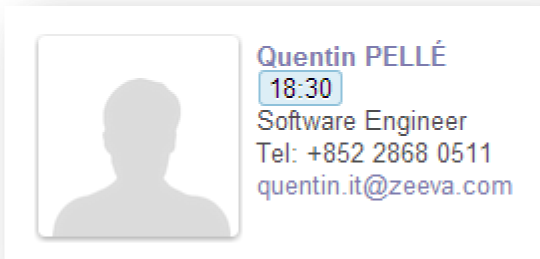
TODO

7. HUMAN RESOURCES

Employees

Go to **Human Resources > Human Resources > Employees**

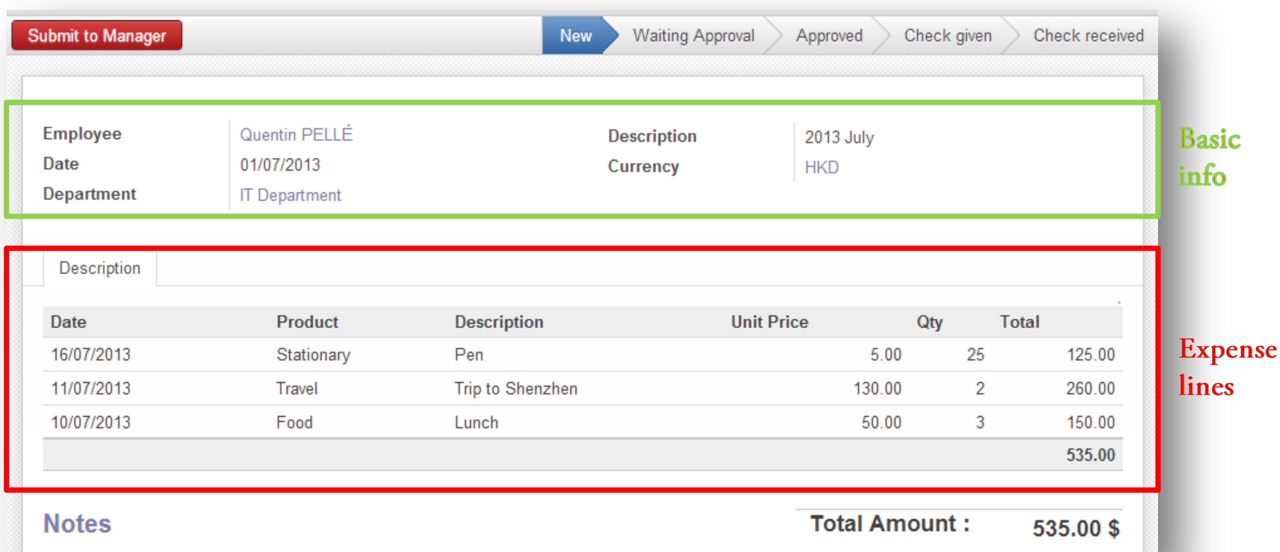
You will find all employees of the company and their public information. You will also be able to see if they are currently on leave. For example:



Expenses

To expense the company, go to **Human Resources > Expenses > Expenses**

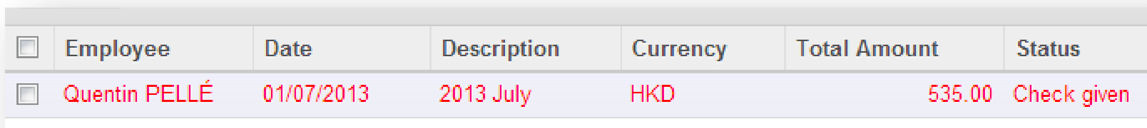
An expense sheet helps you to record all expenses done on behalf of the company. It is defined in one currency only, so you may have to manage several sheets at the same time.

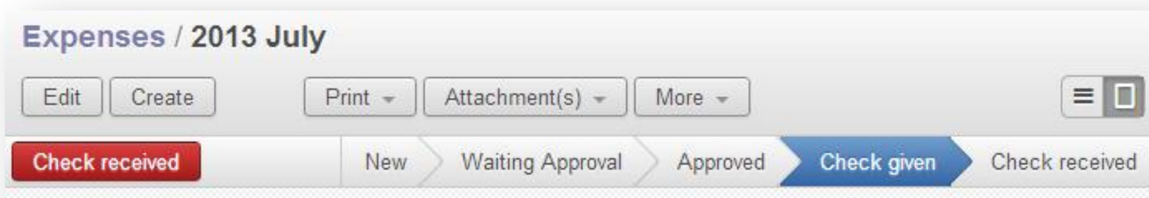


Once you have completed your expense sheet, click on [**Submit to Manager**]. The status is now "Waiting for Approval" and the accountant will be notified.

Print the expense sheet and give it to the accountant together with all the expense proofs.

Once approved by management, a check will be issue to you and the related sheet in the ERP will move to status = Check given. Go to the ERP and click on [**Check received**] to acknowledge the good reception of the check:





If the amount of one purchase is over 1,000 HKD, you can directly submit the expense sheet to a company's manager for instant reimbursement.

In order to be reimbursed for your expenses at the end of the current month, the expense sheet must be submitted to the manager not later than the 25th **day** of the month.

You have a time frame of 7 **days** to record an expense in the sheet. Past this delay, you will have to ask the company's management to do so manually.

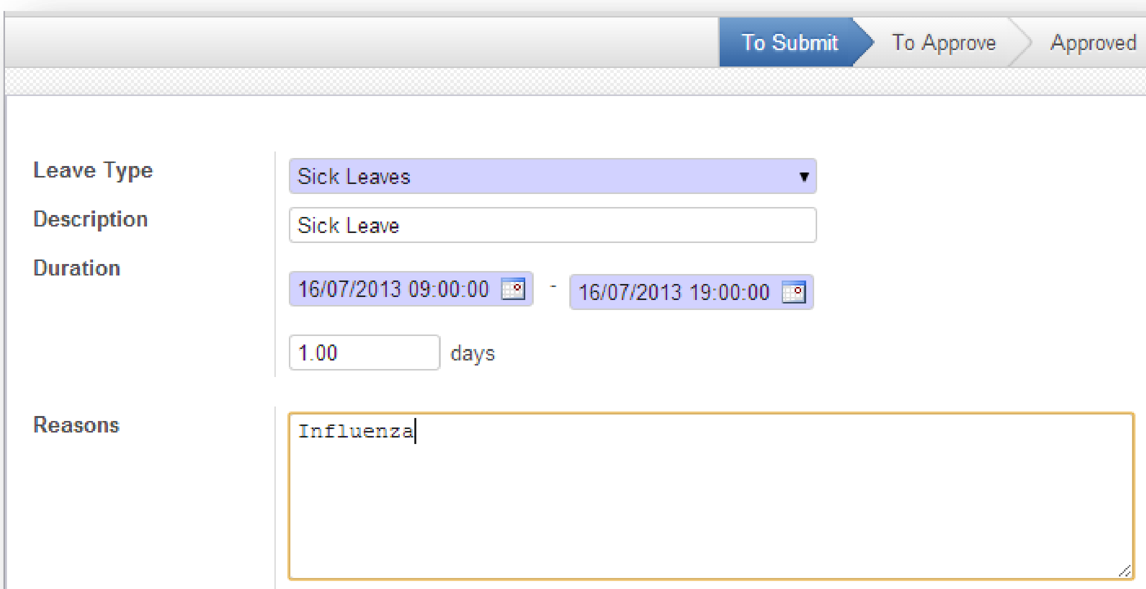
Leaves

There are 4 types of leaves:

- **Legal Leaves:** they are entitled to all employees based on tenure. A year is defined as the period January 1st – December 31st. Once a new year starts, you are entitle days based on the following basic scheme:
  - ✓ Year 1: prorata of 7 days until the end of current year (Dec. 31st)
  - ✓ Year 2, 3: 7 days
  - ✓ Year 4, 5, 6: 10 days
  - ✓ Year 7, 8: 12 days
  - ✓ Year 9, etc.: 14 days
- **Compensatory** Days: at the discretion of the company's management,
- **Sick Leaves:** Log your sick leaves and the scan of the medical certificate,
- **Unpaid Leaves.**

Report sick

When sickness arises, you have to report sick before 10am. Simply go to:
Human Resources > Leaves > Report Sick



All fields are pre-filled, you may input extend the period and give a reason.

Once you click [**Save**], every managers of the company will be notified and an email will be send to them.

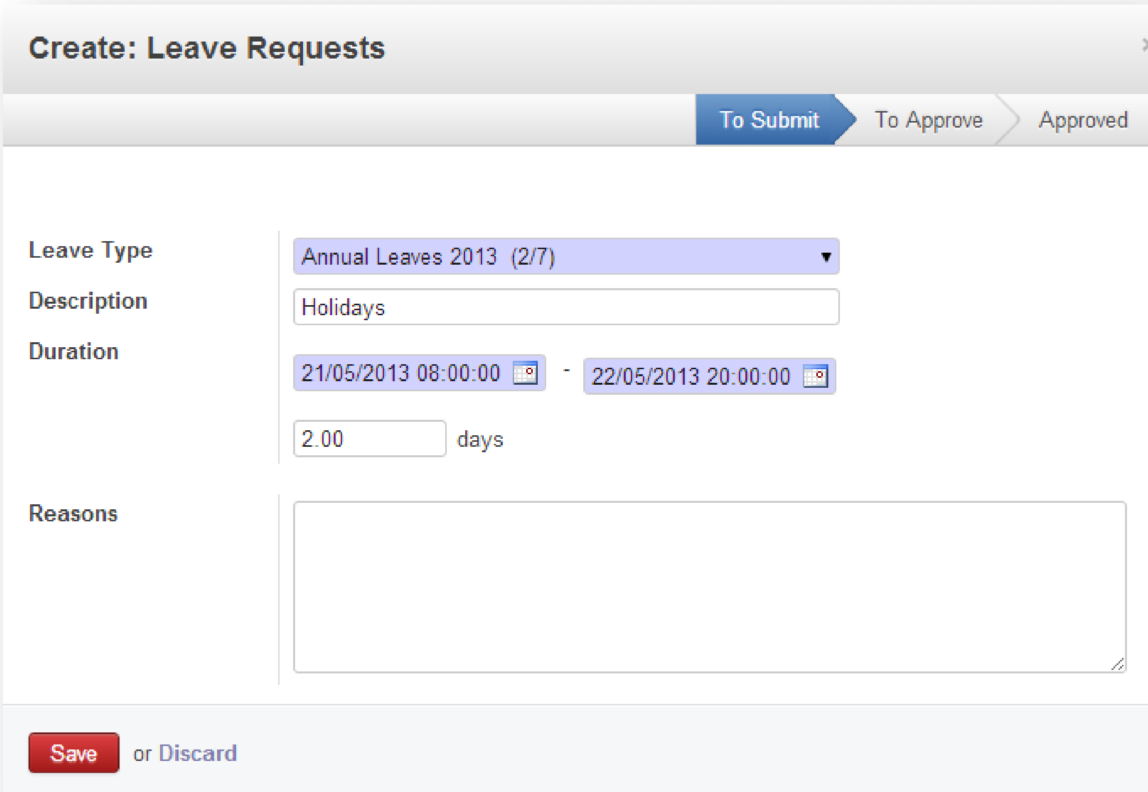
You don't need to send a separate email to report sick, all is done here.

Upload the medical certificate of your sick leave

Once you are back to work, the first thing to do is to attach a scan of your medical certificate to the page.

Request for an annual leave

Go to **Human Resources > Leaves > Leave Requests** and navigate to the starting day of your leave.



All managers will be notified of this new request. Once approved, you will be notified back.

Leaves summary

Go to **Human Resources > Leaves > Leaves Summary**

Leaves Summary

Validated x Type x

Create or Import

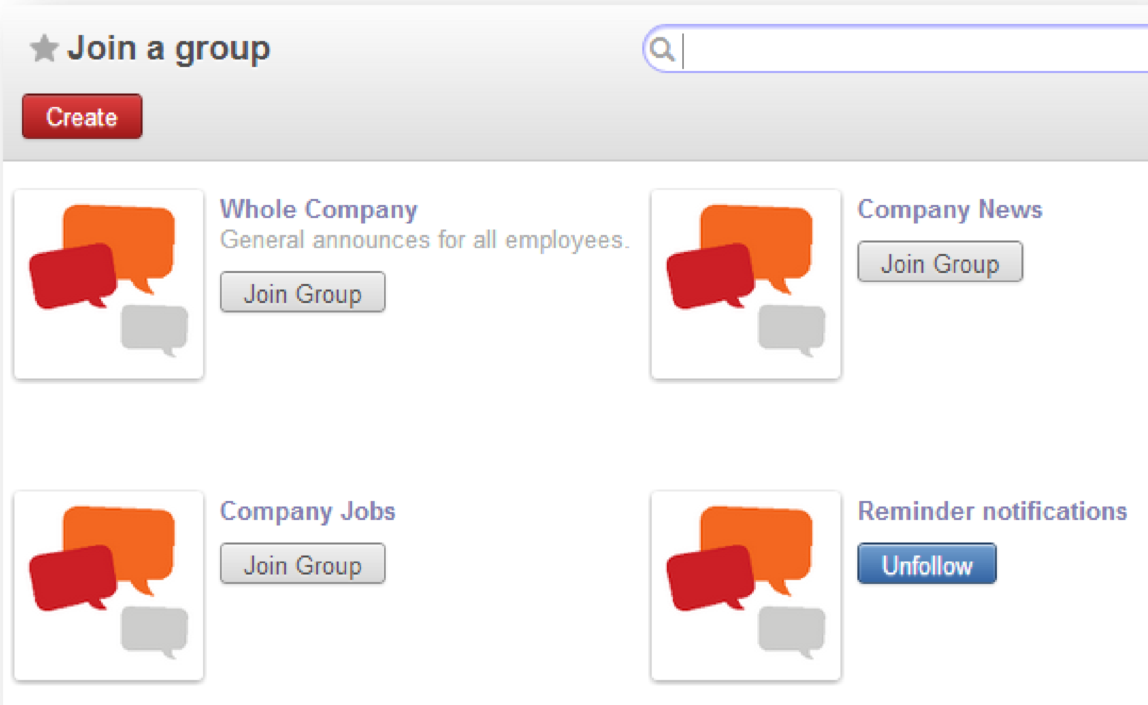
Group	Employee	Request Type	Description	Number of Days	Start Date	End Date	Leave Type	Status
Annual Leaves 2013 (0/0) (2)				5.00				
	Quentin PELLÉ	Leave Request		-2.00	29/05/2013 08:00:00	30/05/2013 09:00:00	Annual Leaves 2013 (0/0)	Approved
	Quentin PELLÉ	Allocation Request	Legal Leaves 2013 for Quentin PELLÉ	7.00			Annual Leaves 2013 (0/0)	Approved
Sick Leaves (1)				-1.00				
	Quentin PELLÉ	Leave Request	Sick leaves 2013-05-24	-1.00	01/06/2013 08:00:00	01/06/2013 20:00:00	Sick Leaves	Approved
				4.00				

You can easily see how many annual leaves you have left.

Reminder notifications

Go to **Messaging > My Groups > Join a group**

Some groups may send you notifications to remind you of doing something in the ERP. You can start/stop following a group to receive or not these notifications.



8. APPENDIX A - GLOSSARY

Word	Definition
ERP	Enterprise Resource Planning software

9. Appendix B – Index

END

Good point

Tips

Warning