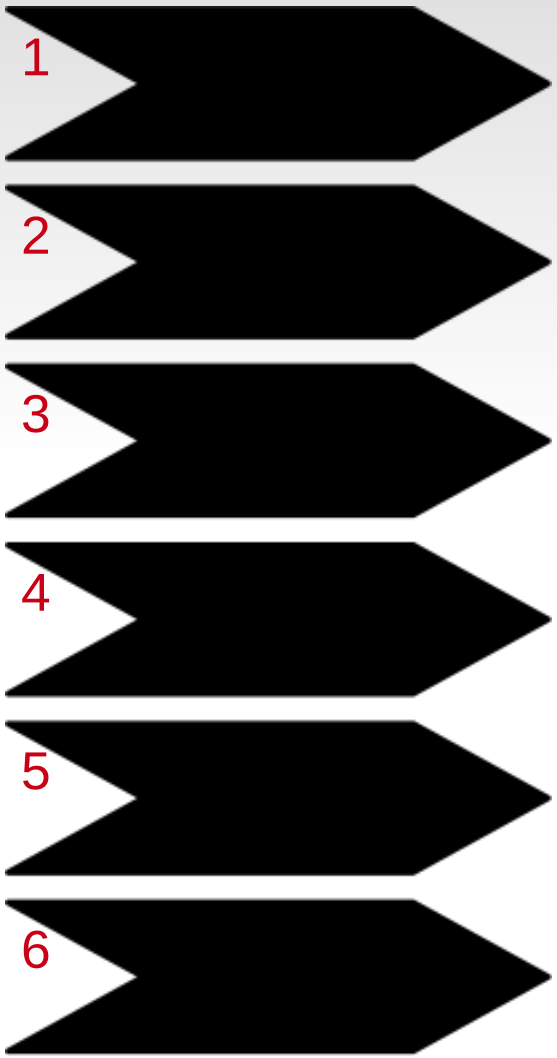
Starting on the right foot
OpenERP Methodology

Would you start building your kitchen before the whole house plan is designed ?

Would you allow a contractor to build your house before you approved the detailed plans?

Would you decide on the price of the house based on the description in the brochure ?

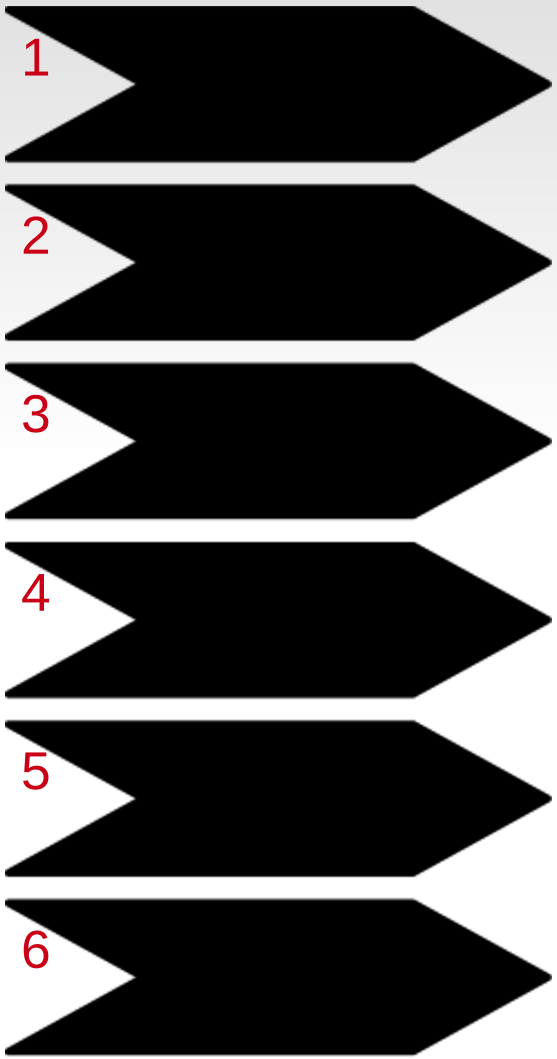
Traditional Approach



- Customer establishes an RFQ, but no RFQ - no matter how extensive - can describe all the customer's processes.
- Traditional suppliers invest heavily in presales but recharge the cost through expensive license costs
- The contract is signed based on incomplete data which leads to:
  - Either the supplier takes a very significant margin to protect himself
  - Either the supplier aims at a conservative cost; the probability that he will renegotiate the contract is high.
- Often in the middle of the implementation supplier and customer need to re-adjust the contract.

OpenERP

OpenERP Recommended Approach

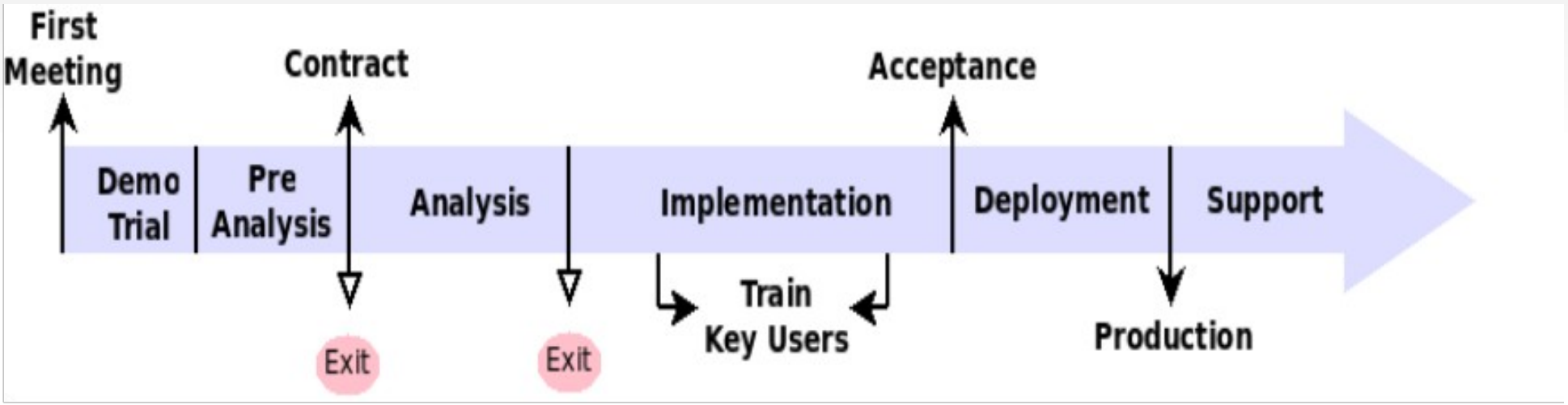


- The customer assesses the software (free trial, demo)
- The partner performs a pre-analysis (7-10 days) during which he will assess whether the customer’s needs are covered by OpenERP or if specific customization is needed, and establishes Theconducts the detailed analysis (screen design, workflow design, report design) for all theprice ieeded
- The customer validates the detailed analysis avoiding any risk of misunderstanding about what needs to be delivered. If parties disagree the contract can be terminated with minimum harm.

Why should we perform an analysis if the customer has already provided a RFQ?

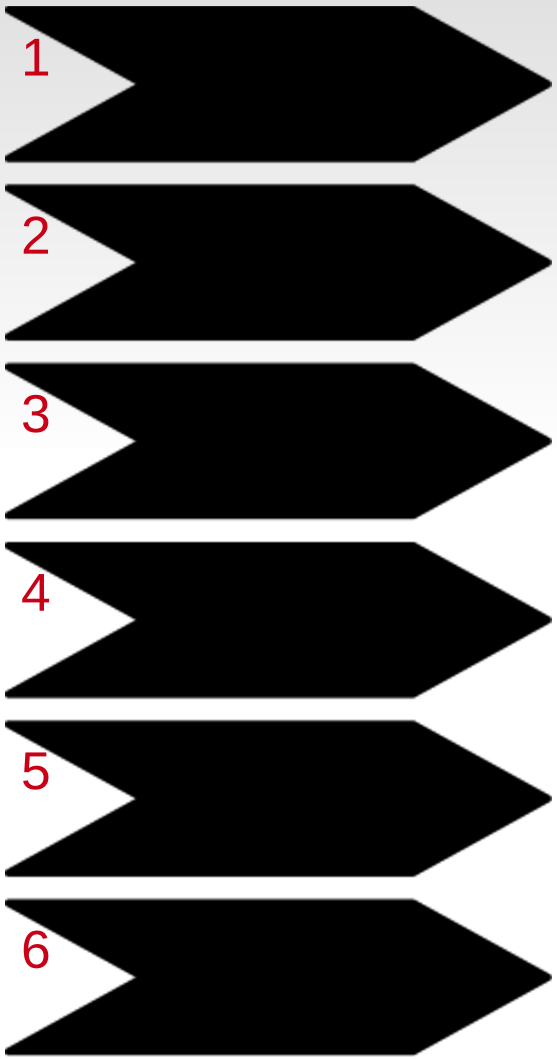
- The RFQ provides a good basis for understanding the company's needs
- No matter how detailed the RFQ is, it will never provide the same level of insight as interviews with the management and the users and will always leave room for interpretation
- A very detailed analysis is the only way to:
  - Limit the risk of misunderstanding between the partner and the client
  - Clearly identify what is in the project scope and what is not
  - Quickly detect difficulties which could be much more complex and expensive to fix if they are handled later on in the project
- Performing the analysis is the best way to build customer intimacy. The customer will judge the trust he can grant to the partner during this initial phase.

Implementation Phases



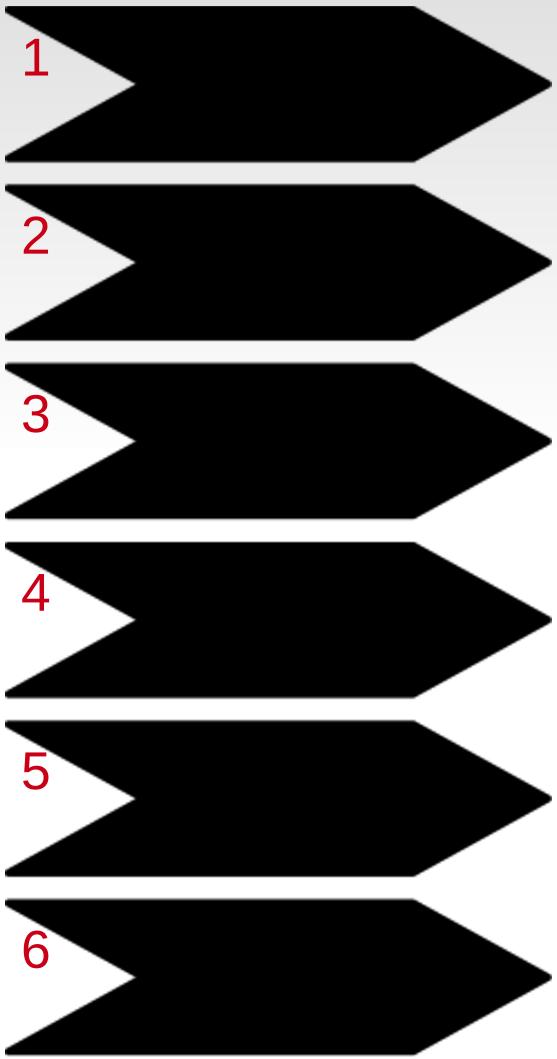
OpenERP

First Step : Software Assessment



- **Objective**:
  - Understand the customer's goals
  - Make the customer familiar with OpenERP
  - Give the customer visibility on the project methodology
- **Task**:
  - Interview with company management
  - Deliver Prove of Concept when appropriate
  - Allow the customer to evaluate the software (Functional Scope, Technical Infrastructure, User Interface)
- **Tools**:
  - OpenERP Presentation (slides)
  - Free Downloads / SaaS platform
  - Demo at the customer site
  - Presentation of OpenERP Methodology (slide)

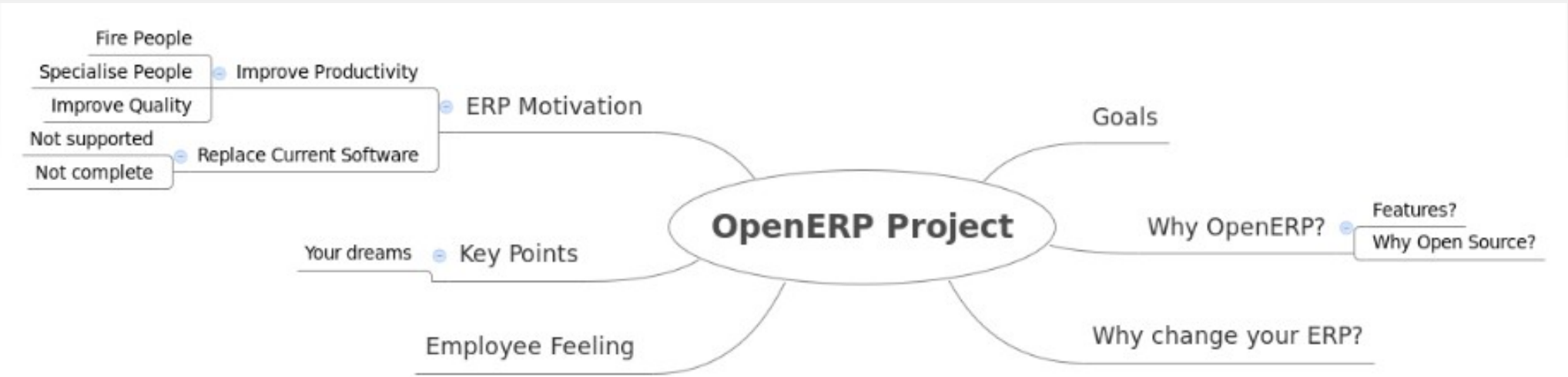
First Step : Software Assessment



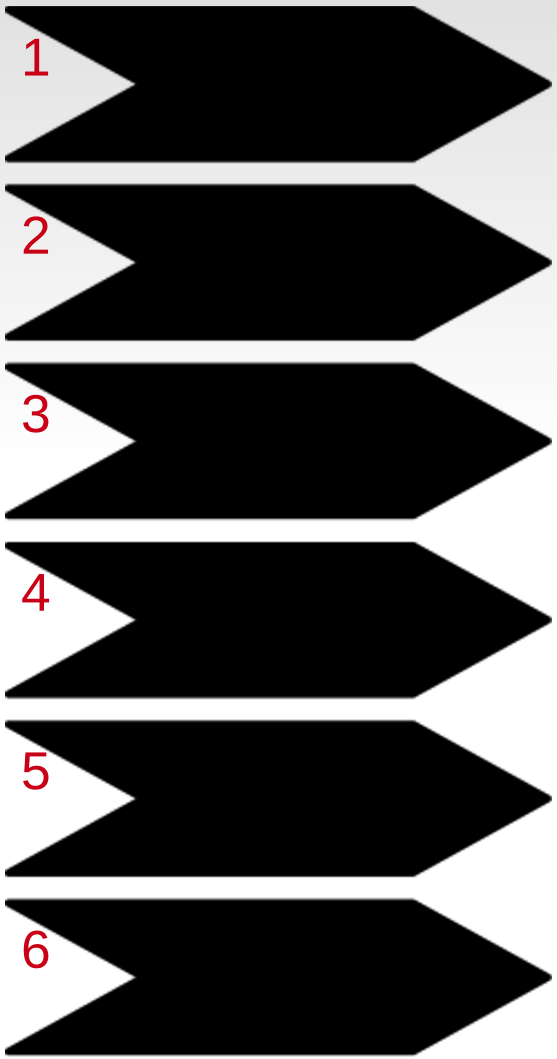
- Send proposal based on:
  - Interview of the customer's management team
  - Description of the methodology
  - Description of what will be achieved during the Pre-analysis Phase

OpenERP

First Step: Initial Project Qualification

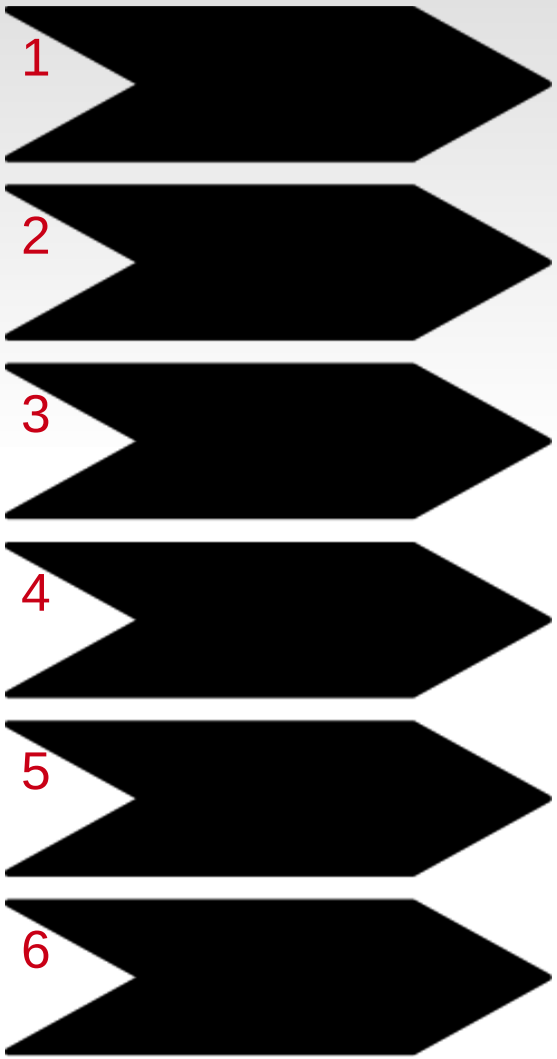


Step two : Pre-analysis



- **Objective**:
  - Define the scope of the project
  - Assess how OpenERP covers the requirements defined in the RFQ
  - Assess the need of the customers and what custom developments will be required to meet the customers needs
  - Establish first price estimate
- **Task**:
  - Interview with company management
  - Interview with employees
- **Tools**:
  - Mind map of interview with top management
  - Mind map of interview with employees
  - Project scope

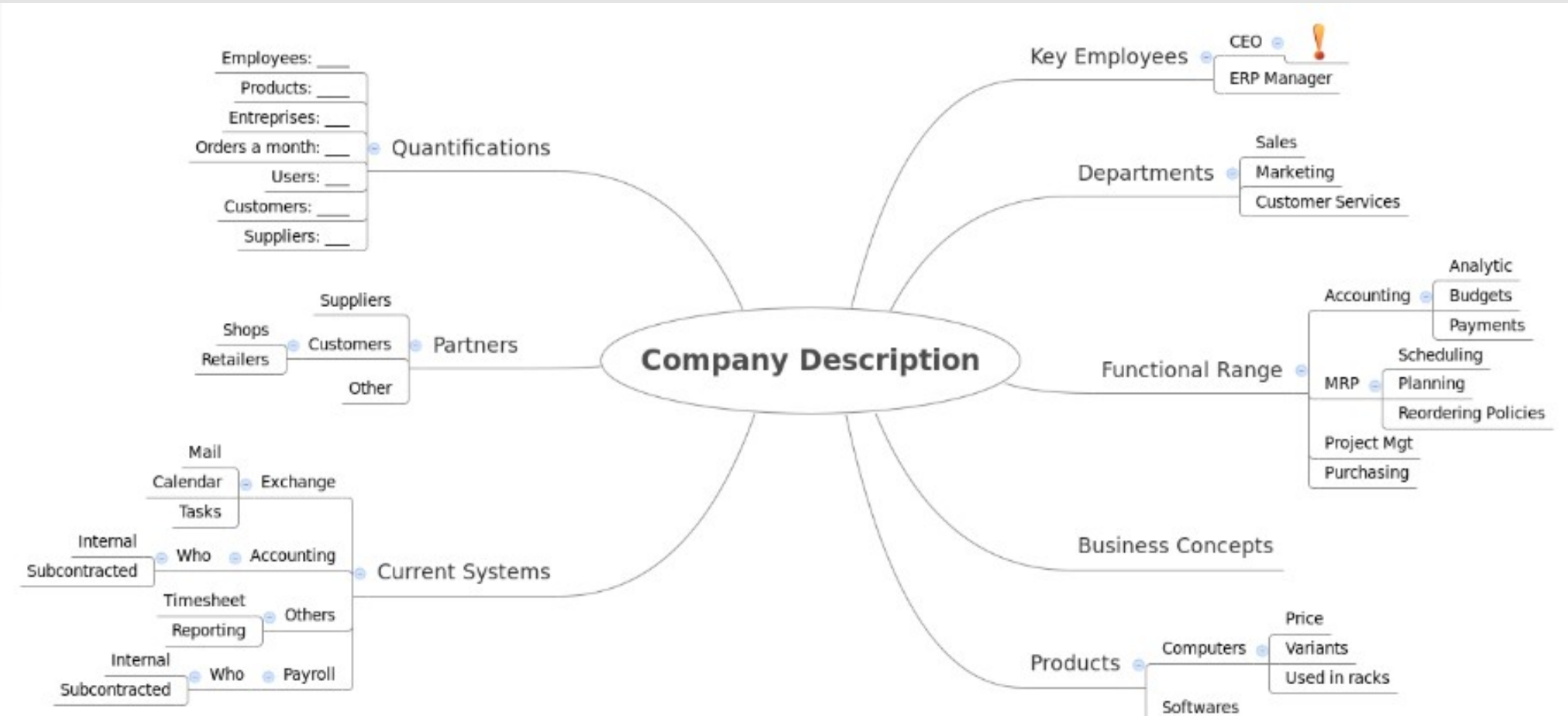
Step two : Pre-analysis



Time Estimate:

- Management Meeting (*½ day*)
- Job Interview (*½ day* per interview)
- Report (*50% - 100% extra of time spent with customer*)
- 2 Process Flows (*½ – 1 day*)
- 2 Screen Designs (*½ – 1 day*)
- Make Preliminary Budget (*1 day*)

Step two: Company Description



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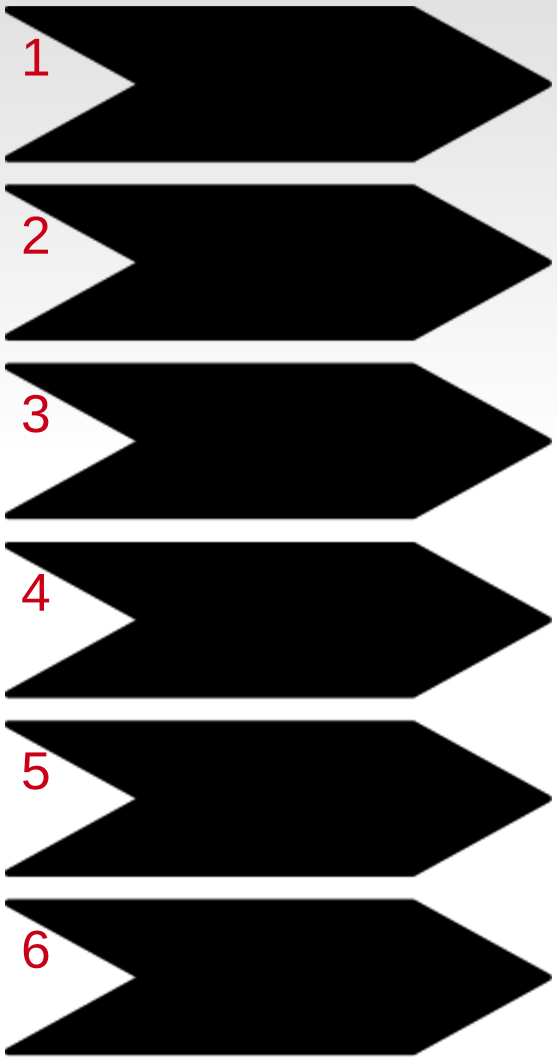
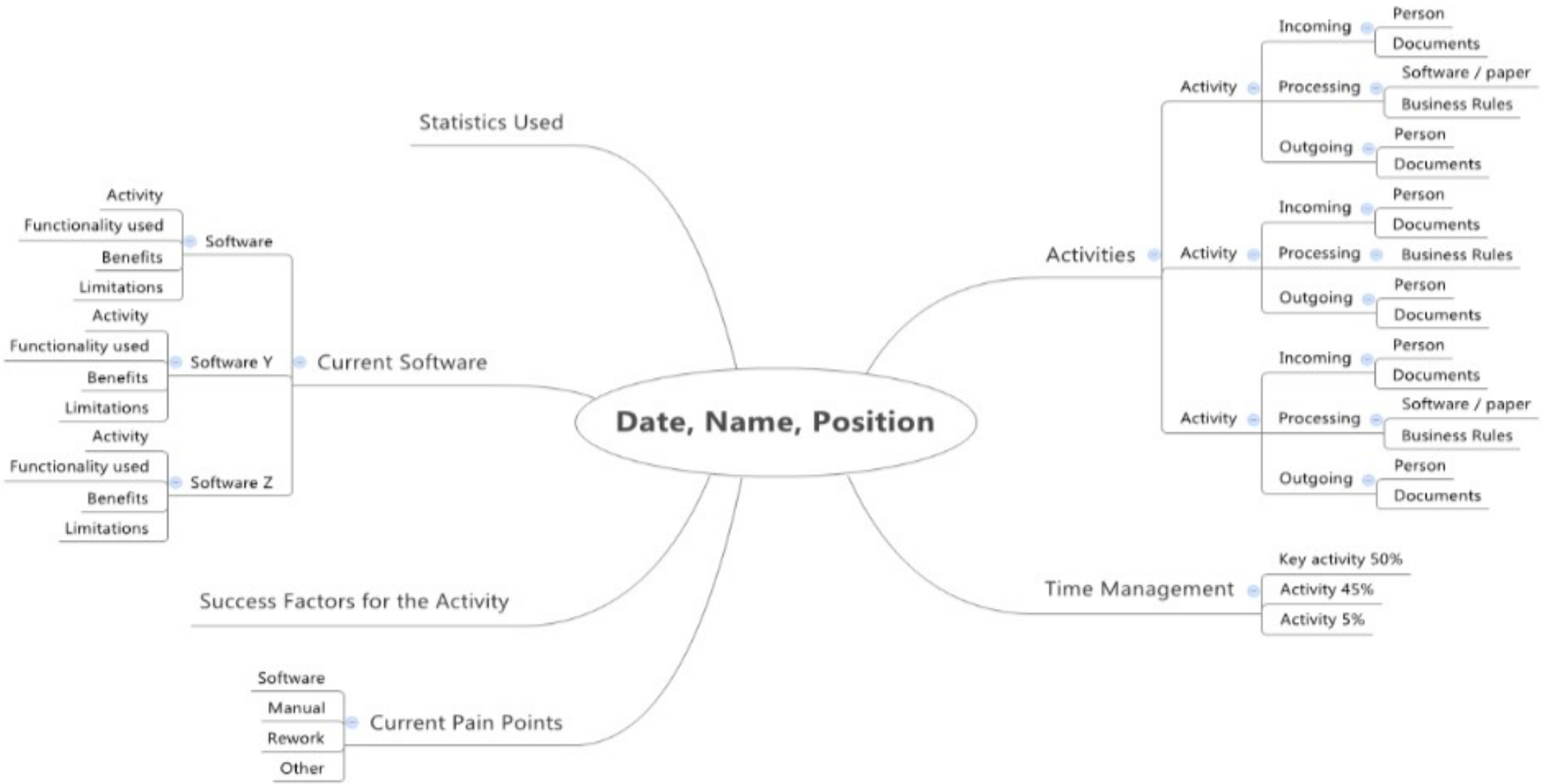
Step two : Employees' Interviews

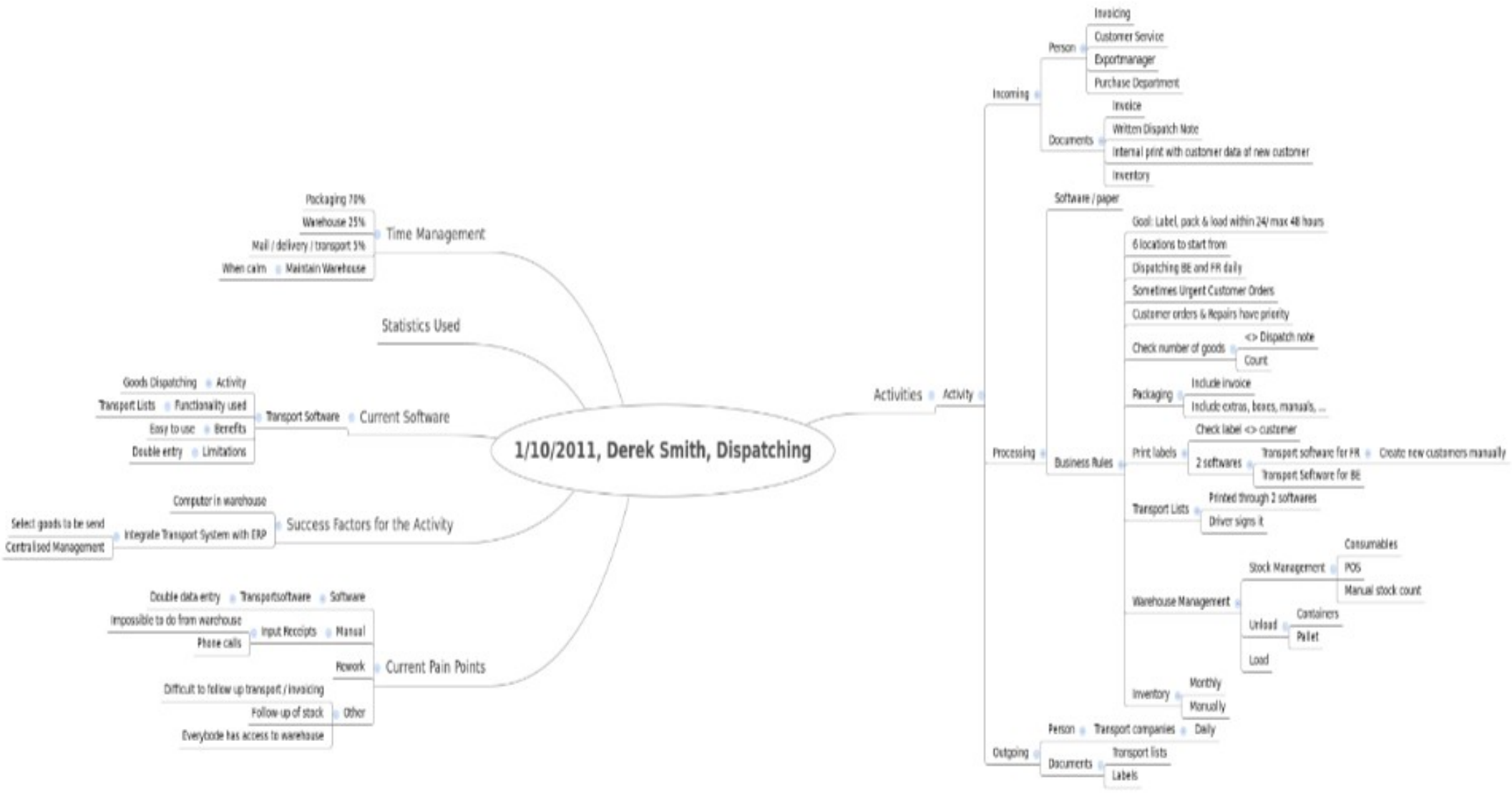


- The employee analysis must be conducted for each position. A position is a coherent group of tasks.
- Beware, a single employee may hold several positions (e.g. a person managing both HR and admin). In that case perform two position analyses with the same person.
- Fill the mind map as you conduct the interview. It will make the person you are interviewing much more comfortable if he/she can check the outcome of your meeting and it will save you a lot of time.

Step two : Employees' Interviews



Step two : Employees' Interviews



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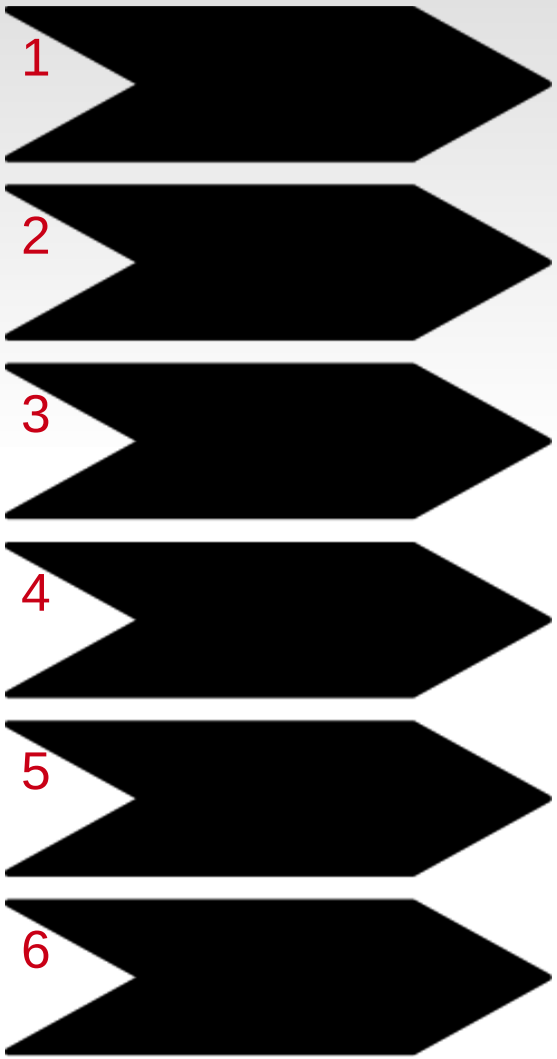
Step two: Project scope



- The project scope defines
  - Functionality
  - Description
  - Covered by OpenERP
  - Estimated Effort
  - Priority
  - Comments
  - Solutions

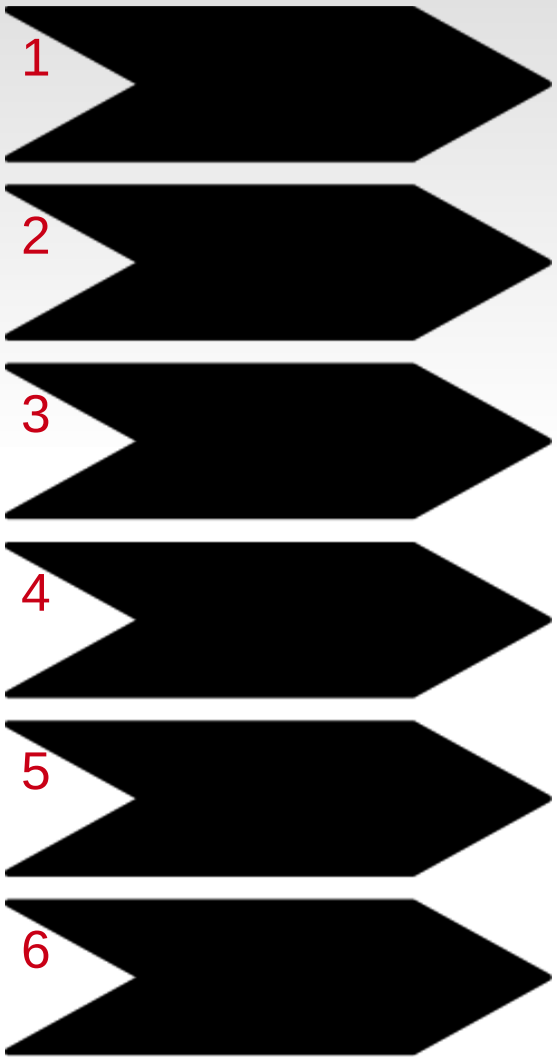
Step two: Project scope

Project Scope

ID	Functionality	Description	Covered by OpenERP	Estimated Effort	Priority	Comments
1	Sales	Create a quotation from an opportunity	100%	0	1	
2	Accounting	Exchange rates are changed on a weekly basis.	100%		2	
3	Accounting	Automatic check on correctness of Belgian VAT numbers	100%		2	
4	HR / Timesheets	Would like to see sign in / sign out of employees to follow up time management	100%		3	
5	HR / Timesheets	Holiday planning in OpenERP	100%		4	
6	LCR	Need module for LCRs (France). Should automatically create the required files. RIB numbers should be checked automatically.	0%	11	1	
7	Packing	Group packing per customer	100%		1	
8	Receipt	Defects in goods : create return + block payment.	50%	3.5	2	Standard OpenERP to create return picking (possible to select invoicing / no invoicing). Can put invoice in specific journal. Validation of invoice always necessary.

OpenERP

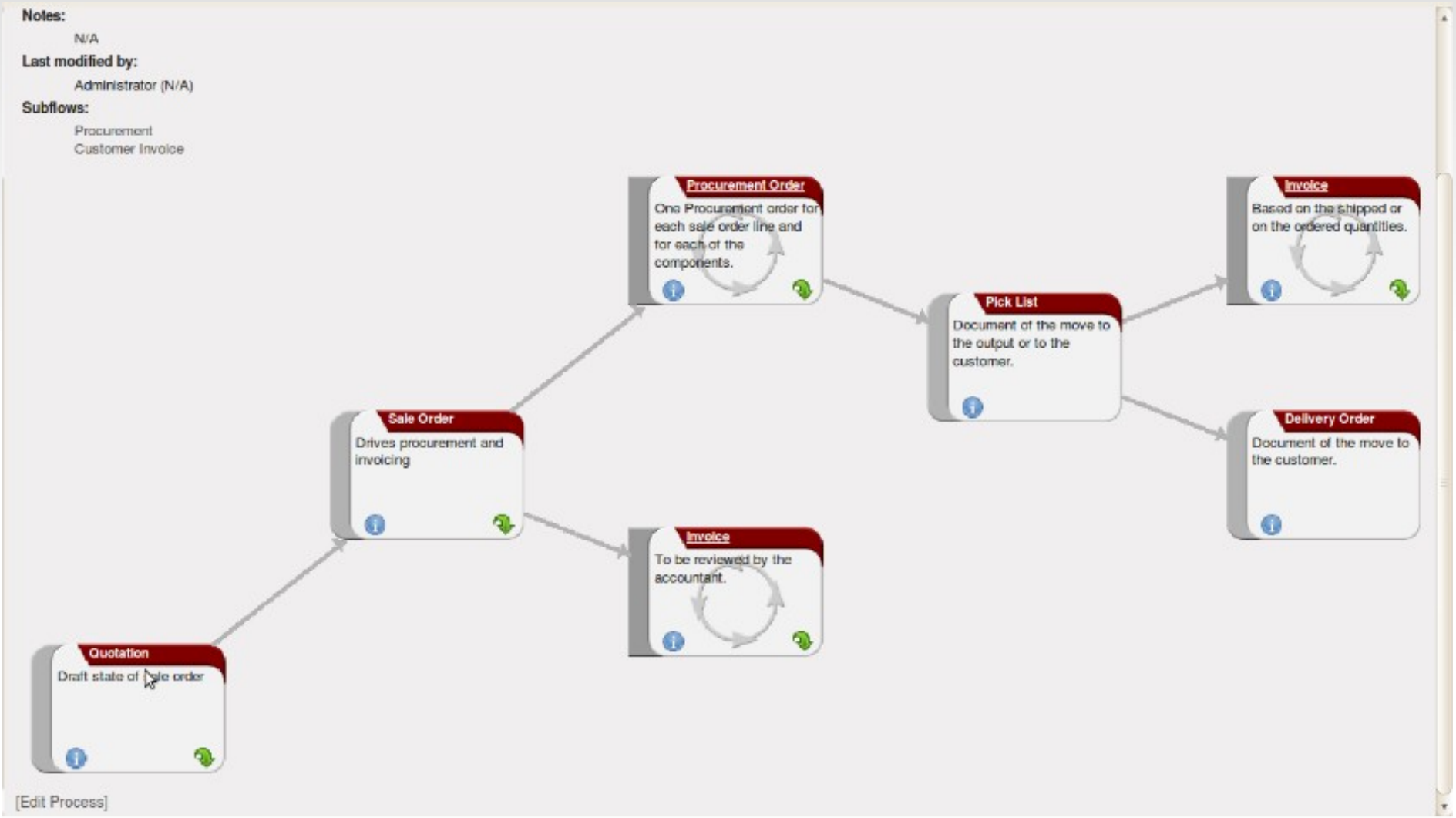
Step two : Process Mapping



- During the interview start the process mapping
- If the task you identify already belongs to an existing process just complete the process. If not create a new process
- Indicate whether the process is a standard process in OpenERP or whether the process will require custom development
- If a process becomes too complex see if it can be split in several processes.
- You can also create some sub processes. Processes which are part of the main process but which are described independently

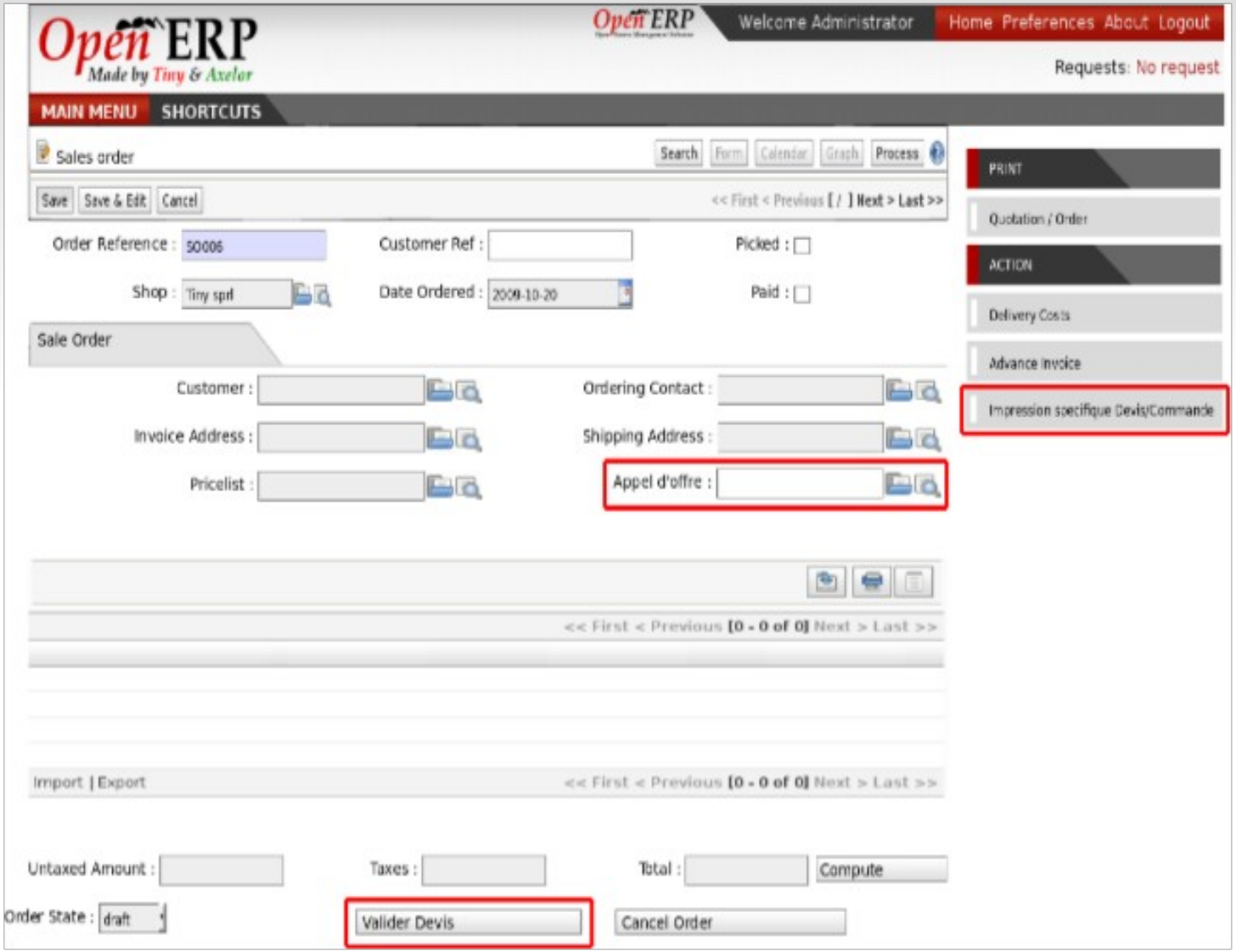
OpenERP

Step 2 :Process mapping, example of a simple workflow



Step two : Screen Design

1
2
3
4
5
6



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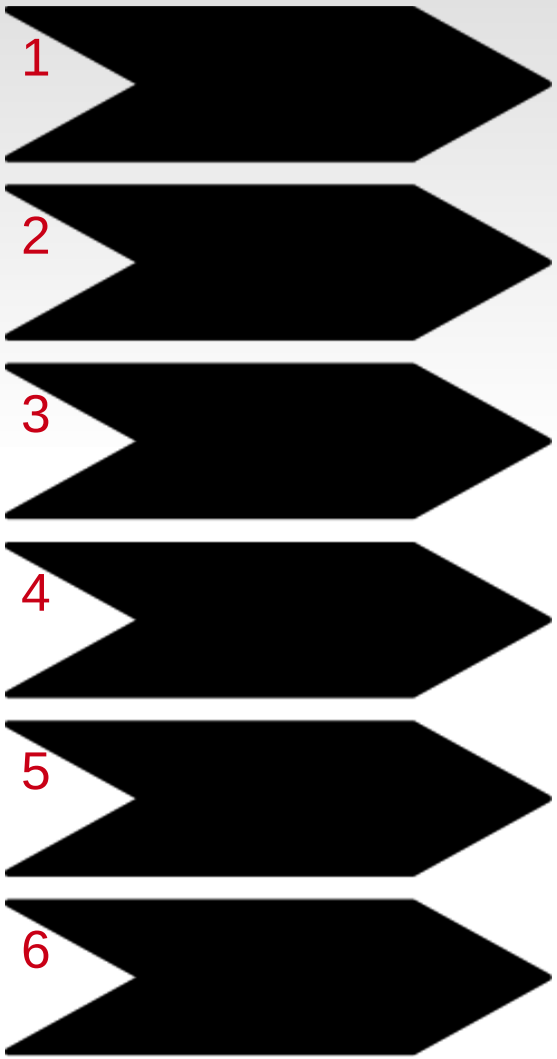
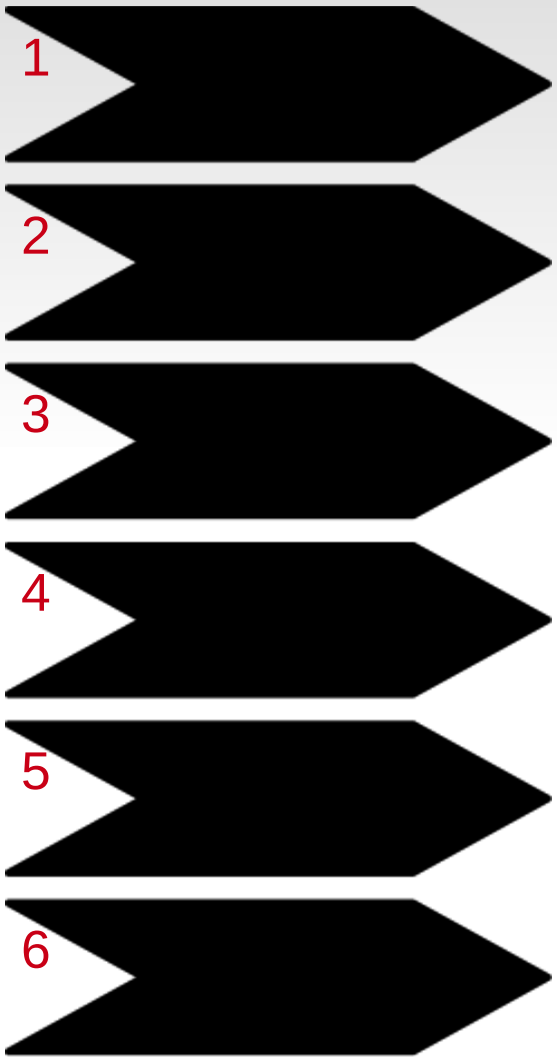
Step Two: The outcome



- At the end of the pre-analysis phase, the partner can deliver to the customer a detailed analysis :
  - The Mind Maps of the interview
  - An analysis of the RFQ
  - A process map
  - An estimated budget
- Start discussing the contract if the customer wishes to conduct the project

OpenERP

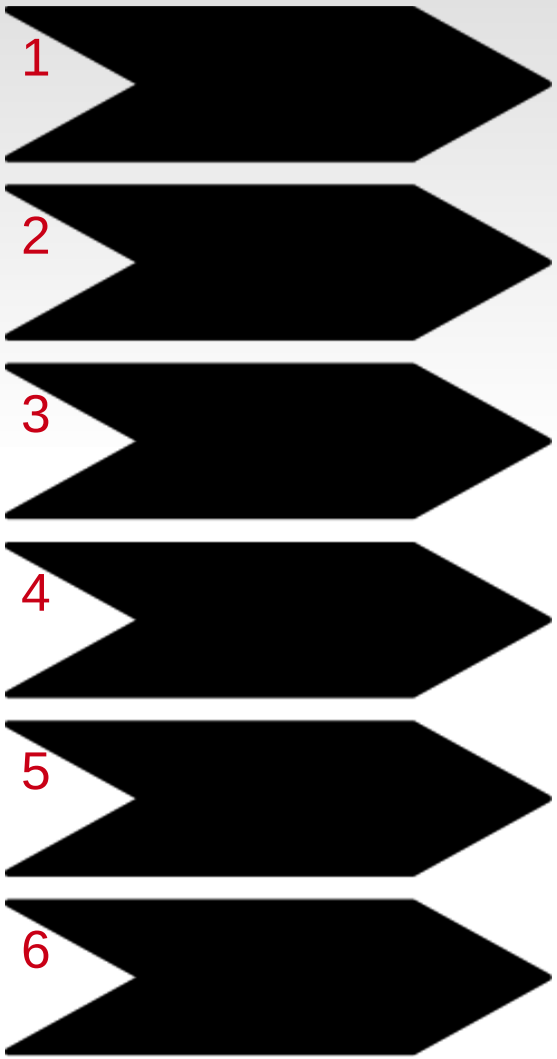
Step Three: Detailed Analysis



- **Objective**:
  - Design and validate the solution
- **Task**:
  - Analyze business processes and design
  - changes to the data model
  - specific screens
  - optional workflows
  - optional wizards (actions)
  - reports and dashboards
  - menu entries
  - user groups and access rights
- **Tools**:
  - Workshop at the customer site

OpenERP

Step Three: Detailed Analysis



Design changes to the data model:

- Security : groups and accesses to the object
- Fields
- Views on the object

Tools:

- OpenERP Object Model Overview Report
- In OpenERP, the report “Model Overview” in “Administration → Customisation → Database Structure → Objects, generates editable report (OpenOffice) describing the objects, fields, modules, views and security.
- Mark changes to the model with different colors

OpenERP

Step Three: Detailed Analysis

Object: sale.shop **Name: Sale Shop**	Type: base In-memory: False Modules: sale

Security

Group	R	W	C	U	Name
Employee	X				sale.shop
Sales / Manager	X	X	X	X	account.journal sale order.user
Sales / User	X				sale.shop.sale.user
Point of Sale / User	X				sale.shop pos_user

Fields

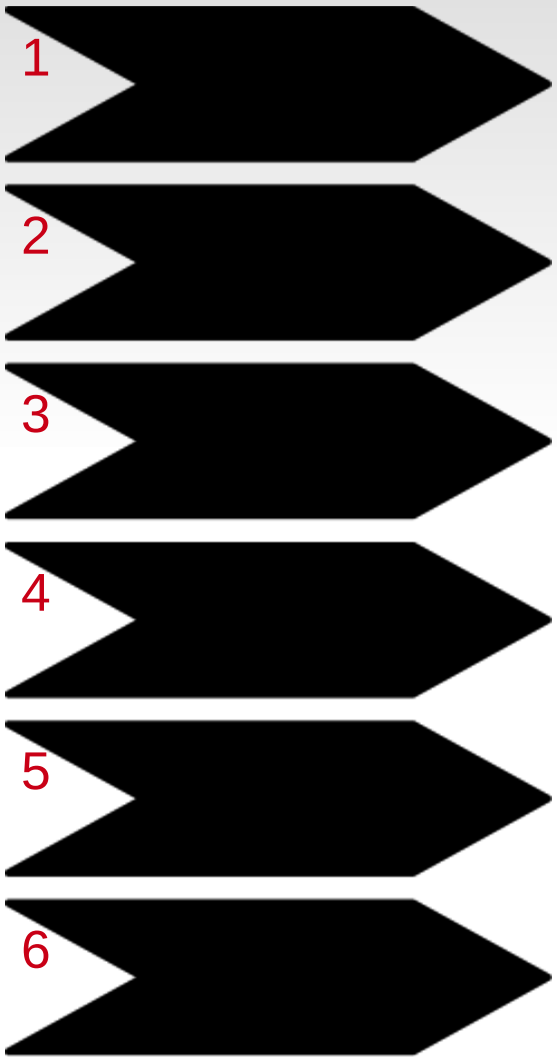
Name	Label	Type	Attributes	Rq	Ro	Tr	Sel	Modules
company_id	Company	many2one	- relation=res.company				0	sale
name	Shop Name	char		X			0	sale
payment_default_id	Default Payment Term	many2one	- relation=account.payment.term	X			0	sale
pricelist_id	Pricelist	many2one	- relation=product.pricelist				0	sale
project_id	Analytic Account	many2one	- relation=account.analytic.account				0	sale
warehouse_id	Warehouse	many2one	- relation=stock.warehouse				0	sale
myfield	Example	test						mymod

Views

Seq	Type	Name	XML ID	Inherited
16	form	sale.shop	sale.view_shop_form	
16	tree	sale.shop	sale.view_shop_tree	

OpenERP

Step Three: Analysis through Screen Design



Design screens:

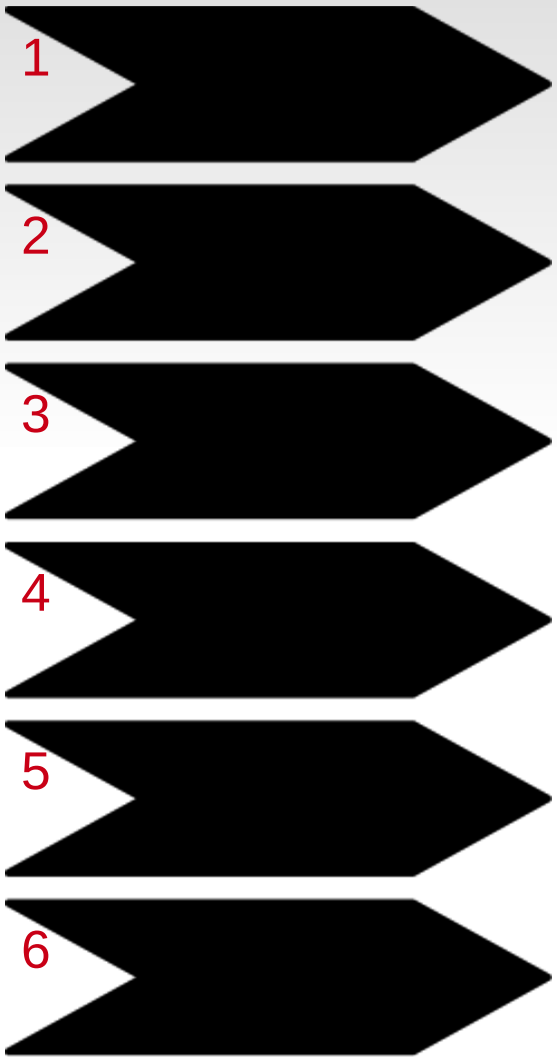
- Design modifications on existing views
- Design new views

Tools:

- DIA (Diagram Editor) with OpenERP widgets and view import plugin
- In DIA “Tools → Load OpenERP View”, import the view you would like to modify. Use the OpenERP widgets to customize the view. Export the view to your report and annotate the changes

OpenERP

Step Three: Analysis through Workflow Design



Design workflow:

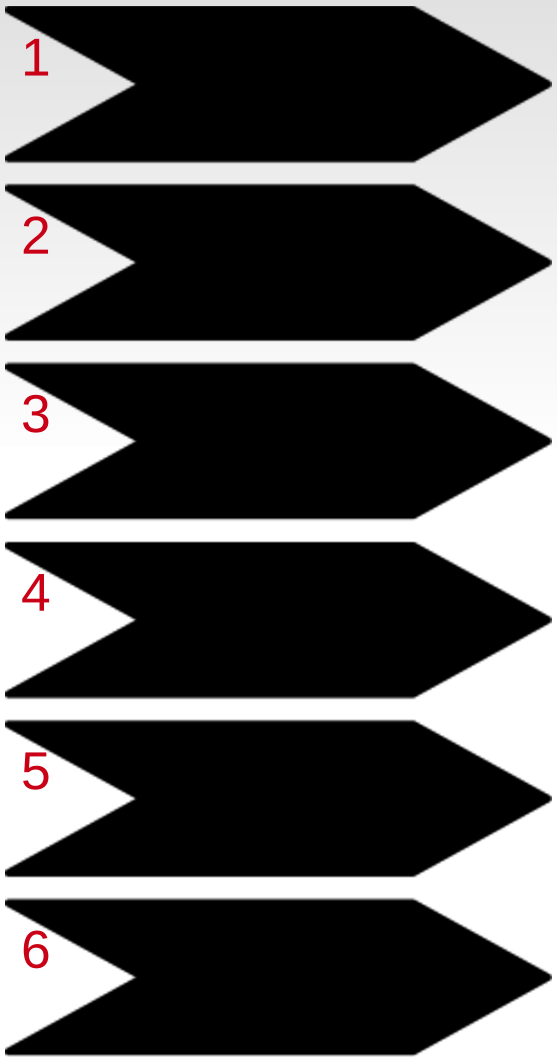
- Design modifications on existing workflow
- Design new workflows

Tools:

- DIA (Diagram Editor)
- In DIA, modelize the required changes on the workflow. Export the diagram to your report and annotate the changes

OpenERP

Step Three: Step Three: Analysis through Report and Dashboards Design



Design reports and dashboard:

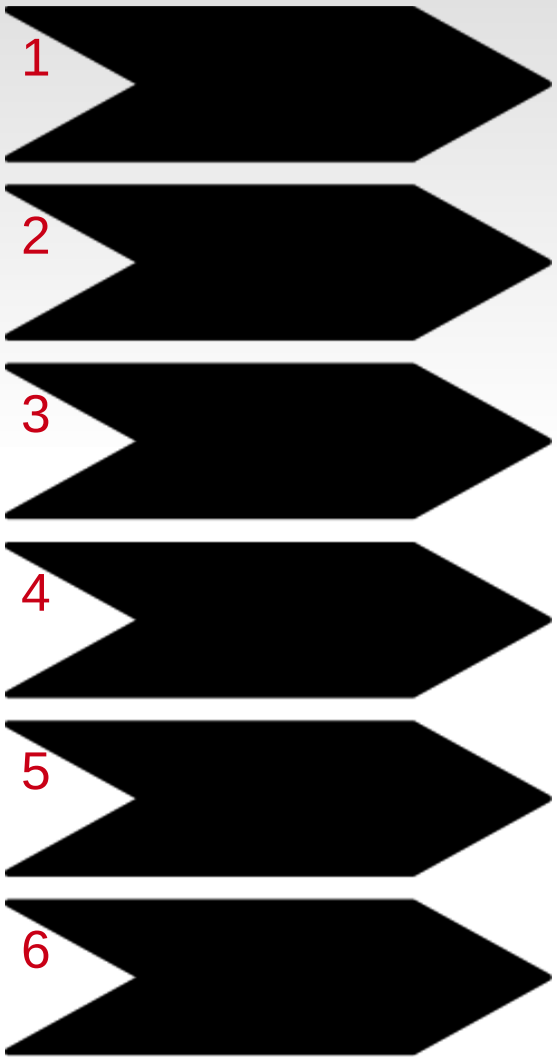
- Sketch up required reports and dashboard

Tools:

- OpenOffice Writer
- Create a simple prototype of the reports that have to be implemented.

OpenERP

Step Three: Step Three: Analysis through Report and Dashboards Design



Design wizards:

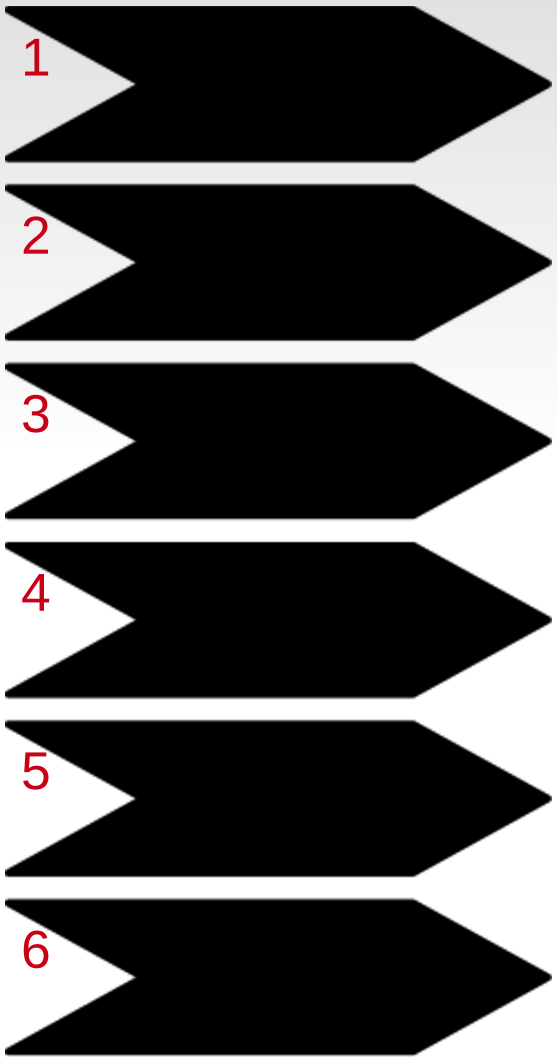
- Explain wizards that have to be implemented. Use previous tools for views, access, processes when appropriate

Tools:

- OpenOffice Writer
- DIA

OpenERP

Step Three: Step Three: Analysis through Menu and Access Design



Design menu:

- List menu entries to add and corresponding views

Tools:

- OpenOffice Writer

Design access:

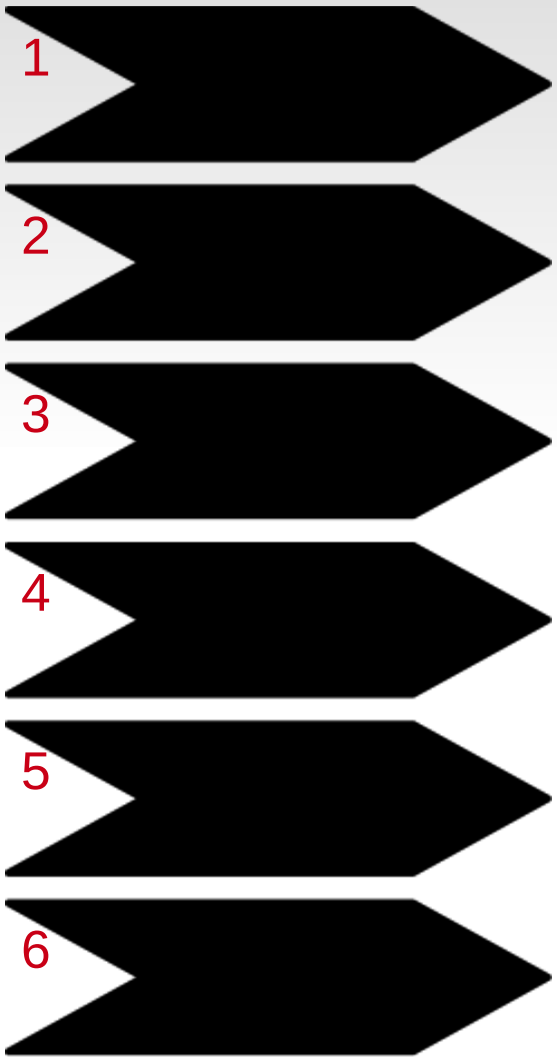
- Define specific access rights. Associate groups to the specific access rights

Tools:

- OpenOffice Writer

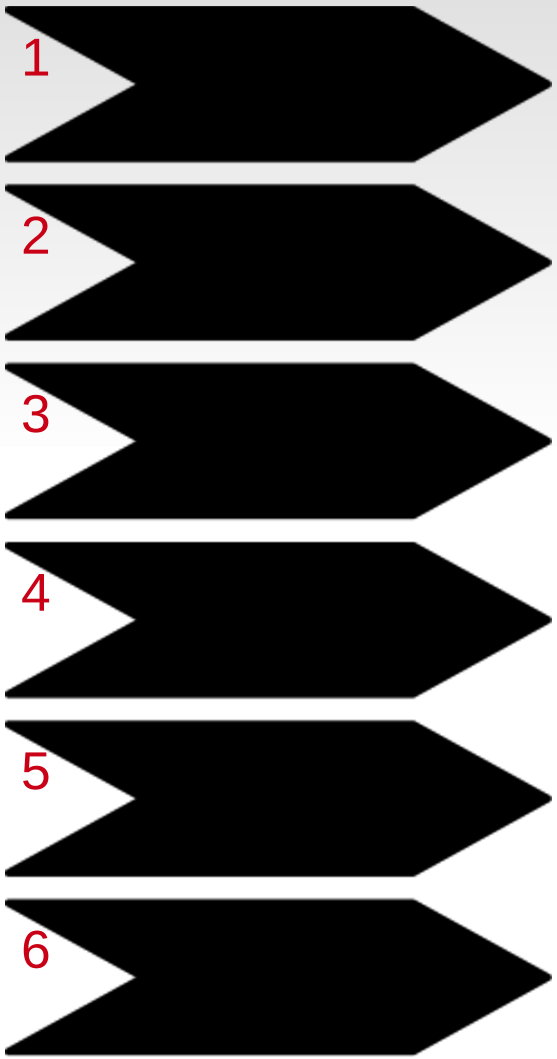
OpenERP

Step Four: Implementation



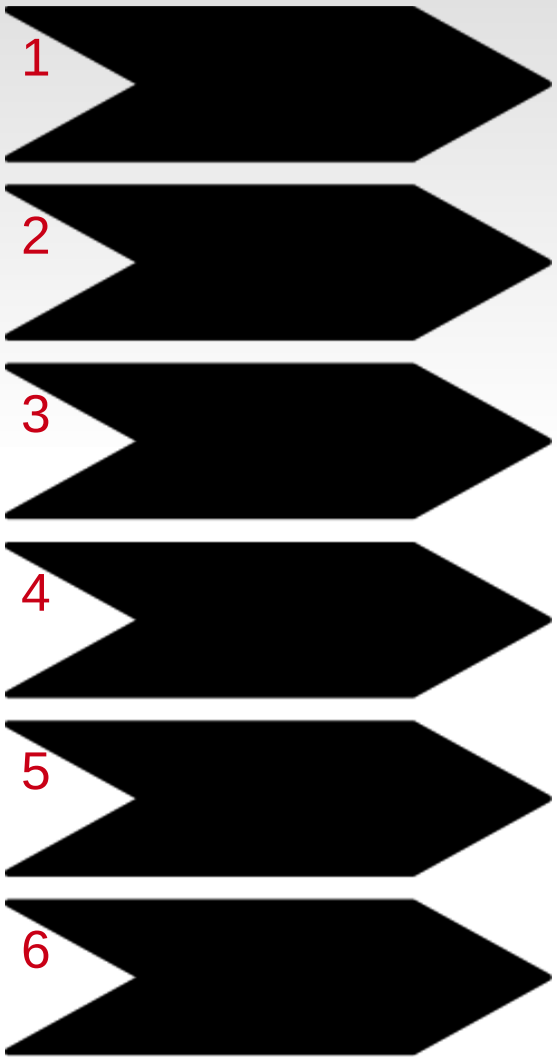
- **Objective**:
  - Implement the solution
  - Load demo data
  - Customer Validation
- **Task**:
  - Define sprints
  - Create project tasks
  - Develop the solution
- **Tools**:
  - OpenERP

Step Five: Deployment



- Deployment of OpenERP
  - Development version
  - Production version
  - Training version (preferably)
- Import Customer Data
  - Development version
  - Production version
- End-user Training
- Customer Assistance

Methodology Impact



- Improve Project Management
- Short Decision Cycles
- Higher Quality of Deliverables
- Faster Deployment
- Strong Customer Commitment

OpenERP