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1 Compiere Mobile



Contact Contact Menu

Name	John Plant
Comments	
Business Part...	Joe Block
Partner Locat...	Hartford
Position	BP Payables Con...
Last Contact	
Last Result	

5555 56789

4444 4444

plant@example.com

Edit

1.1 Intended Audience

This document is intended to be of value to existing Compiere users and administrators with an understanding of how the Compiere Active Dictionary is used to configure Roles, Menus, Windows etc. The purpose is to introduce the mobile application functionality and to show how it leverages the existing Compiere infrastructure to manage the mobile application in a secure fashion.

1.2 Why a Mobile ERP&CRM Application?

Compiere users have suggested that it would be useful to access the CRM and ERP information stored in Compiere via an iPhone or an Android phone.



This capability would be particularly useful for sales persons checking information when visiting a customer, or for a manager who wishes to closely monitor some aspect of the business whilst away from his/her desk or laptop.

As a consequence of these requests Astidian has developed an application that displays Compiere ERP&CRM information directly in a smartphone.

1.3 Introducing “Compiere Mobile”

Compiere Mobile utilises a browser as the display mechanism to simplify supporting multiple smartphone platforms from a single body of code. The application is invoked from an icon on the phone's menu screens in the same manner as any other application. The browser URL bar is automatically hidden to save screen space.

Compiere Mobile has been developed to utilise the same screen design elements as a standard iPhone native application. Users with an iPhone will be immediately comfortable with the layout and the screen elements. Due to the high quality of Apple's user interface designs an Android phone-user should also be comfortable with the screen handling. The user interface is intended to provide effective access to corporate data; simplicity and clarity were the fundamental goals. Functionality

1.4 Security and Access Control

Business's will naturally be concerned that their corporate information may be easily accessed or perhaps even modified from a lost or misplaced mobile phone. Protection against such access requires that usernames and passwords are NOT either “remembered” on the Compiere server (through users' preferences) or remembered by the phone directly using the browsers remembered-passwords capabilities. Webkit based browsers are the defaults in iPhones and Android based phones. Compiere Mobile utilises the capability of webkit-based browsers to disable the auto-complete of login fields. Please note that this feature may be ignored by some other browsers.

To reduce cost and administrative complexity, Compiere Mobile utilises the standard security and menu creation mechanisms of Compiere ERP&CRM. To enable access to Compiere data all that is required is to create a Role in the standard Compiere Role window and flag that Role as accessible by a mobile device [still WIP]. A User granted that role will see the Role displayed when they log-in via a mobile device. Users logged in with that Role will see only the Windows, Reports and Processes enabled in that Role.

1.5 Navigation

All navigation through the menus in the application is by buttons displayed on the screen header, for example the “Menu” and “Logout” buttons as shown below:



1.6 Telephony Integration

A telephone call can be initiated to any phone number stored in Compiere and displayed on the phone by touching the phone number for more than approx one second. Active phone numbers will display as follows:



1.7 Email Integration

An email can be initiated to any email address stored in Compiere and displayed on the phone by touching the email address for more than approx one second. The phones mail application will be invoked and the addressee field auto-filled. Active email addresses will display as follows:



1.8 Data Entry

Existing Compiere records can be modified wherever an Edit button is displayed. Edit buttons are shown like:



We have disabled data entry without first clicking the Edit button to avoid confusion with the touch-screen navigation.

1.9 Consistency with Standard Compiere Behaviour

As can be seen from the screenshots in the next section, the use of the Compiere on the Compiere Mobile interface faithfully mimics the standard Java SWING and ZK Ajaxa behaviour except where the reduced amount of screen size would render that pointless. Users with Compiere experience should be immediately comfortable with the Compiere Mobile application behaviour.

1.10 Reports

Reports can be produced by entering the desired parameters in the parameter select screen. The report will be produced as a PDF and downloaded to the phone where it can be viewed with whatever pdf viewer is available on the phone.

2 Screenshots

2.1 Compiere Log-in (Username and Password)

The standard log in screen



The screenshot shows a mobile application interface for logging in. At the top, there is a blue header with the word "Login" in white. Below the header, there are three input fields: "User", "Password", and "Language". The "Language" field is a dropdown menu currently showing "English" with a downward arrow. Below these fields is a large, rounded rectangular button labeled "Login". The bottom half of the screen is a large white area, likely a placeholder for a logo or additional information.

Note that the Language dropdown list will display in the same form as shown in illustration 3.3.

2.2 Compiere Log-in (Role)

The User selects a Role from the dropdown list (if the user has more than one Role flagged as mobile) or otherwise accepts the displayed value.

The Client will default from the Role. The Organisation can be selected from the dropdown list as per normal Compiere behaviour.



ASTIDIAN *Systems*
Making your business smarter

Login **Login**

Role

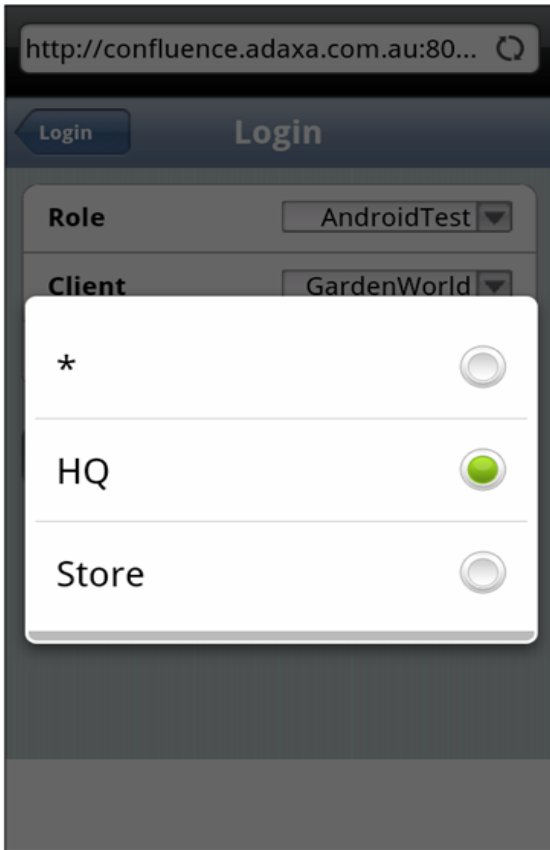
Client

Organizati...

OK



2.3 Compiere Log-in (Drop-down list display)

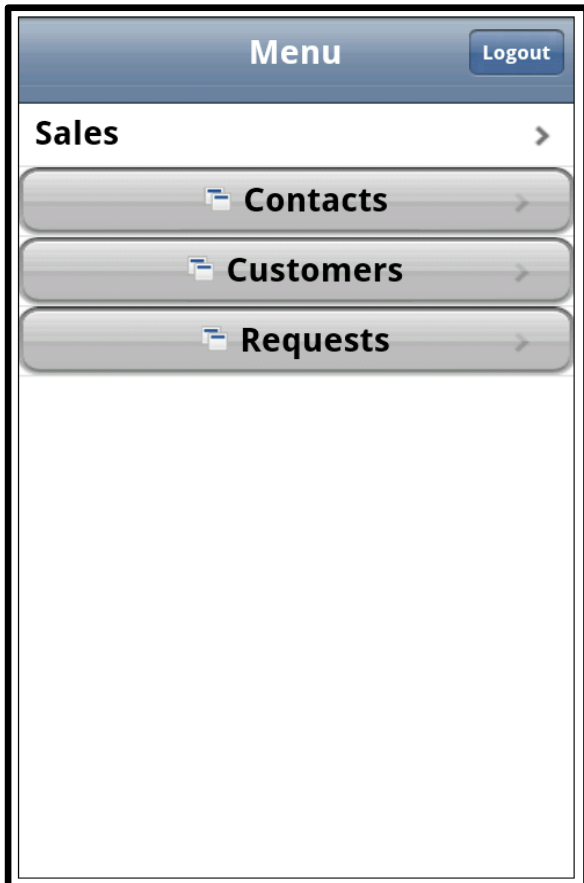


This screenshot shows the standard presentation of an Compiere drop-down list as displayed in the Compiere Mobile UI.

2.4 Top Level Menu

A Role with the name 'AndroidTest' was created in the Compiere ERP&CRM System and marked as accessible by mobile devices. The Role provide access to a very limited selection of Windows as shown below.

- "Sales" is a menu with submenu items that will be displayed if the 'Sales' button is tapped.
- "Contacts", "Customers" and "Requests" are standard Compiere windows as can be seen by the normal Compiere 'Window' icon to the left of the words in the field label.



2.5 Contacts Selection List

After pressing the Contacts button in the previously displayed menu, the Contacts screen will display a list of Contacts from the Compiere Contact table (AD_User). Compiere Mobile will display the first two columns flagged as "Is Identifier" in the AD table definition. In the AD_User table only Name has been flagged as an identifier and Name is the only value displayed below.

Where a second column is flagged as an Identifier, it will appear in a smaller, un-bolded font below the primary Identifier as shown in the "Orders" tab later in this document.

The displayed Contact records will be controlled by the standard Compiere window display logic. For example if the display logic says "only select the records where the logged in User is shown as the Sales Representative of the Customer who owns the Contact" then only those Contacts will be visible in Compiere Mobile.

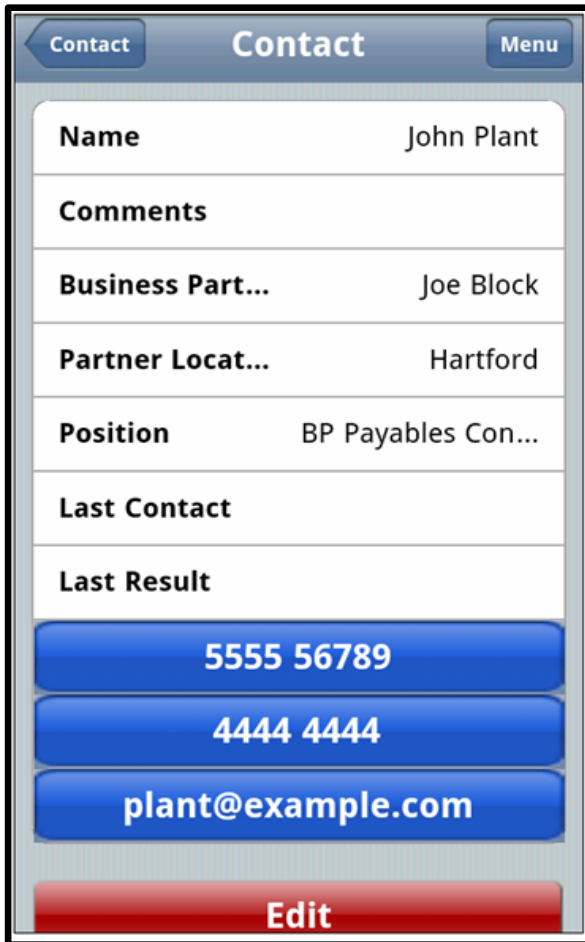


2.6 Contacts Screen

The Contacts screen displays the information recorded in Compiere about the selected contact.

The white-text-on-blue-background buttons indicate that a phone call or an email will be initiated by pressing the button for approx one second.

The white-text-on-red-background button indicates that this button needs to be pressed and held to enable edit mode for the record.



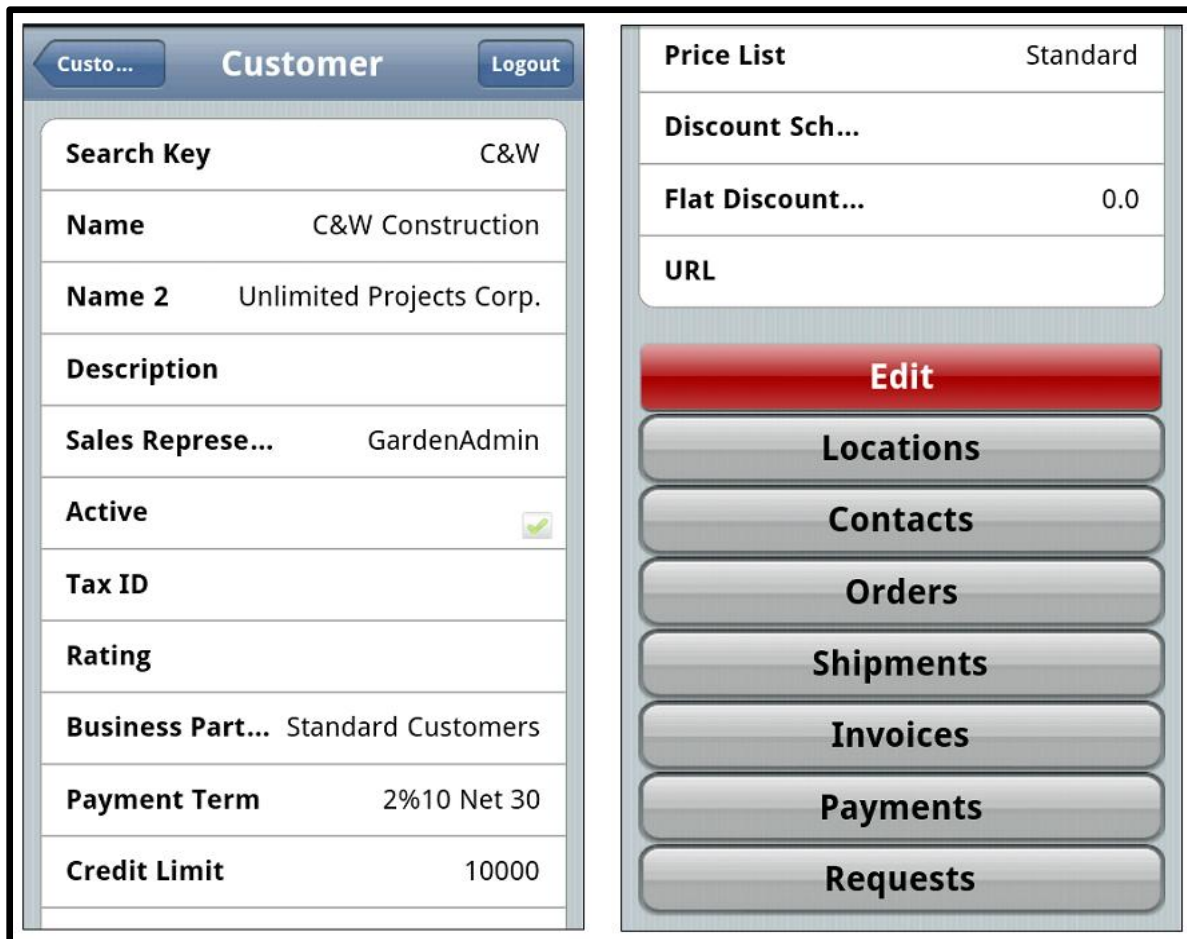
2.7 Customer Screen

If the Customers button is tapped then a list of Customers will be displayed. The screen below shows the data displayed about the customer "C&W Construction."

Top half of the screen

Bottom half of the screen

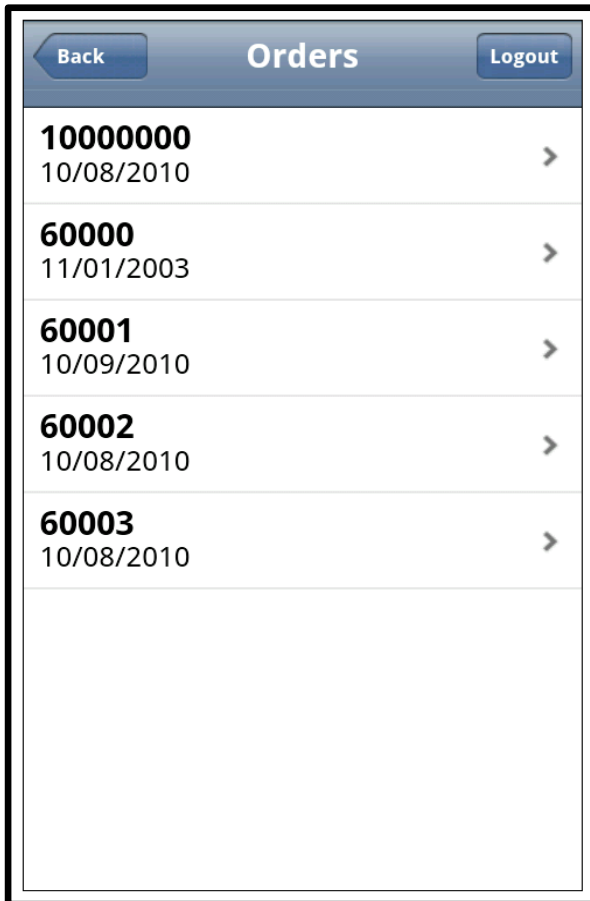




The items with a grey background (from 'Location' down to "Requests") are extra tabs in the Customer Window which give access to additional information about the customer. For the purposes of this example, the standard Compiere "Business Partner Info" window has been cloned and slightly modified (using the standard AD window definition processes) to display all the information we may wish to see about a Customer in a single place. A Company with different needs can simply reconfigure the Window definition in the Active Dictionary to display those items relevant to its needs. The modified Window definition will be accessed by the Compiere Mobile UI automatically. (Note that a few items of data have been dropped from the above screen shots due to the large number of data elements in the screen.)

2.8 The Orders Tab in Customer Screen

The Orders tab in the Customer Window displays the Order Documents for this Customer. The Document number has been set as the 1st Identifier in the AD table definition and Date as the 2nd Identifier. The 2nd Identifier displays smaller and less bold.



Order ID	Date	Action
1000000	10/08/2010	>
6000	11/01/2003	>
60001	10/09/2010	>
60002	10/08/2010	>
60003	10/08/2010	>

2.9 Display of an Order Record

The Order Header record in the standard Compiere window contains many fields. The following four Compiere Mobile screenshots display all those fields. If all the fields are not required then the window should be cloned in the Active Dictionary in Compiere, the not-required fields ticked as inactive and the new Window added to the mobile Role.

The standard Window fields occupy 4 separate screenshots and are as follows:

Order		Logout
Client	GardenWorld	
Organization	HQ	
Document No	60002	
Order Refere...		
Description		
Target Docu...	On Credit Order	
Self-Service	<input type="checkbox"/>	
Date Ordered	10/08/2010	
Business Part...	Joe Block	
Invoice Partner	JoeBlock-Joe Block	
Partner Locat...	Hartford	
Business Part...	Joe Block	
Invoice Partn...	JoeBlock-Joe Block	
Partner Locat...	Hartford	
Invoice Locat...	Hartford	
User/Contact		
Invoice Cont...		
Delivery		
Warehouse	HQ Warehouse	
Invoicing		
Price List	Standard	
Currency	USD	
Sales Repres...	GardenUser	



Currency USD	Status
Sales Repres... GardenUser	Total Lines 200
Discount Prin... <input checked="" type="checkbox"/>	Grand Total 200
Payment Rule	Document St... In Progress
Payment Term Immediate	Document Ty... On Credit Order
Promotion C...	Copy Lines
Reference	Process Order
Project	Order Type
Campaign	Order Source
Status	Edit
Total Lines 200	Order Line
Grand Total 200	Order Tax

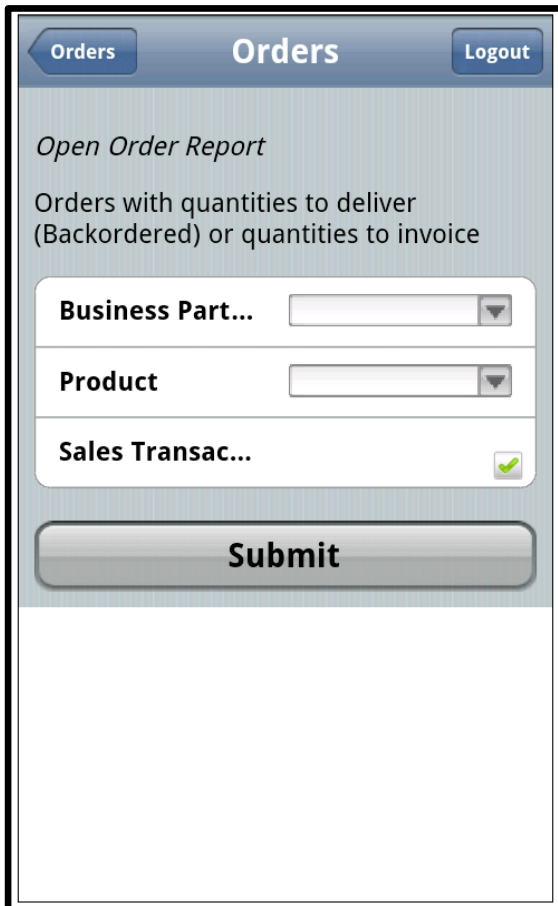
Note that the "Copy Lines" buttons (etc) are displayed but perform no function.

2.10 Display of an Order Line Record

A Sales Order line record displays the following information. The large number of data fields required three separate screen shots. Should a business require it, the number of displayed fields can be easily reduced in the manner described in the previous section.

Order L... Order Line Menu	
Client	GardenWorld
Organization	HQ
Order	60002_2010-10-...
Line No	10
Product	Fertilizer#50_Fer...
Charge	
Attribute Set...	
Resource Ass...	Not Yet Supported
Description	
Quantities	
Quantity	10
Quantity	10
UOM	Each
Amounts	
Price	20
Unit Price	20
List Price	20
Tax	Standard
Discount %	0.00
Reference	
Project	
Campaign	
Status	
Project	
Campaign	
Status	
Amounts	
Price	20
Unit Price	20
List Price	20
Tax	Standard
Discount %	0.00
Reference	
Project	
Campaign	
Status	
Line Amount	200
Edit	

2.11 Creating a Report



The screenshot shows a mobile application interface for creating an order report. At the top, there is a header bar with a back arrow, the text "Orders", and a "Logout" button. Below the header, the text "Open Order Report" is displayed, followed by a description: "Orders with quantities to deliver (Backordered) or quantities to invoice". There are three input fields: "Business Part..." with a dropdown arrow, "Product" with a dropdown arrow, and "Sales Transac..." with a checked checkbox. A large "Submit" button is located at the bottom of the form area.

Reports can be generated from within the Compiere Mobile UI. The output of the report will be a pdf which will be sent to the phone and which can be opened with the phone's standard pdf viewer.

2.12 Running a Compiere Process

The screenshot below demonstrates running a process to convert a Proposal or Quotation to an accepted Order. The same method would apply to any Compiere Process or Report that was added to a mobile Role. The displayed screen contents are sourced directly from the underlying Compiere system and show the same information as the equivalent Java SWING or ZK Ajax screens.

Orders

Orders

Logout

Convert open Proposal or Quotation to Order

You can convert a Proposal or Quotation to any other Order document type. You would use this process, if you want to maintain/keep the Proposal or Quotation. The document status needs to be In Process.

Order

Document Type

Document Date

Close Docum...

Submit

3 Summary

3.1 Security and Access Control

The Compiere Mobile application securely exposes as much or as little of Compiere's total functionality as the client desires.

3.2 Maintained with Standard Compiere Processes

Managing the information and processes available to each mobile user is simple and uses the native Compiere security and access control procedures.

3.3 Simple Deployment

The Compiere Mobile Application is deployed by starting the Compiere application server and exposing it to the internet.

3.4 No Training

The phone UI will be immediately familiar to iPhone users and quite intuitive to any other smartphone users.

3.5 More Information?

For more information please contact info@Astidian.com

DOCUMENT SUMMARY SHEET

Client:	
Title of Document	
Summary: <i>(Brief description of document)</i> This document contains an overview of the Compiere Mobile application for the sole purpose of enabling the target audience to gain an understanding of the functionality of the application. It is not warranted that this document is error free.	
Indexing Terms: (Keywords)	
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NOTES

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