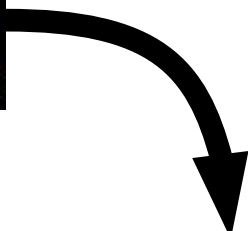# ERP5 Categories Spreadsheet

This guide will teach you:

- What you need categories for.
- How to fill categories into Spreadsheet.
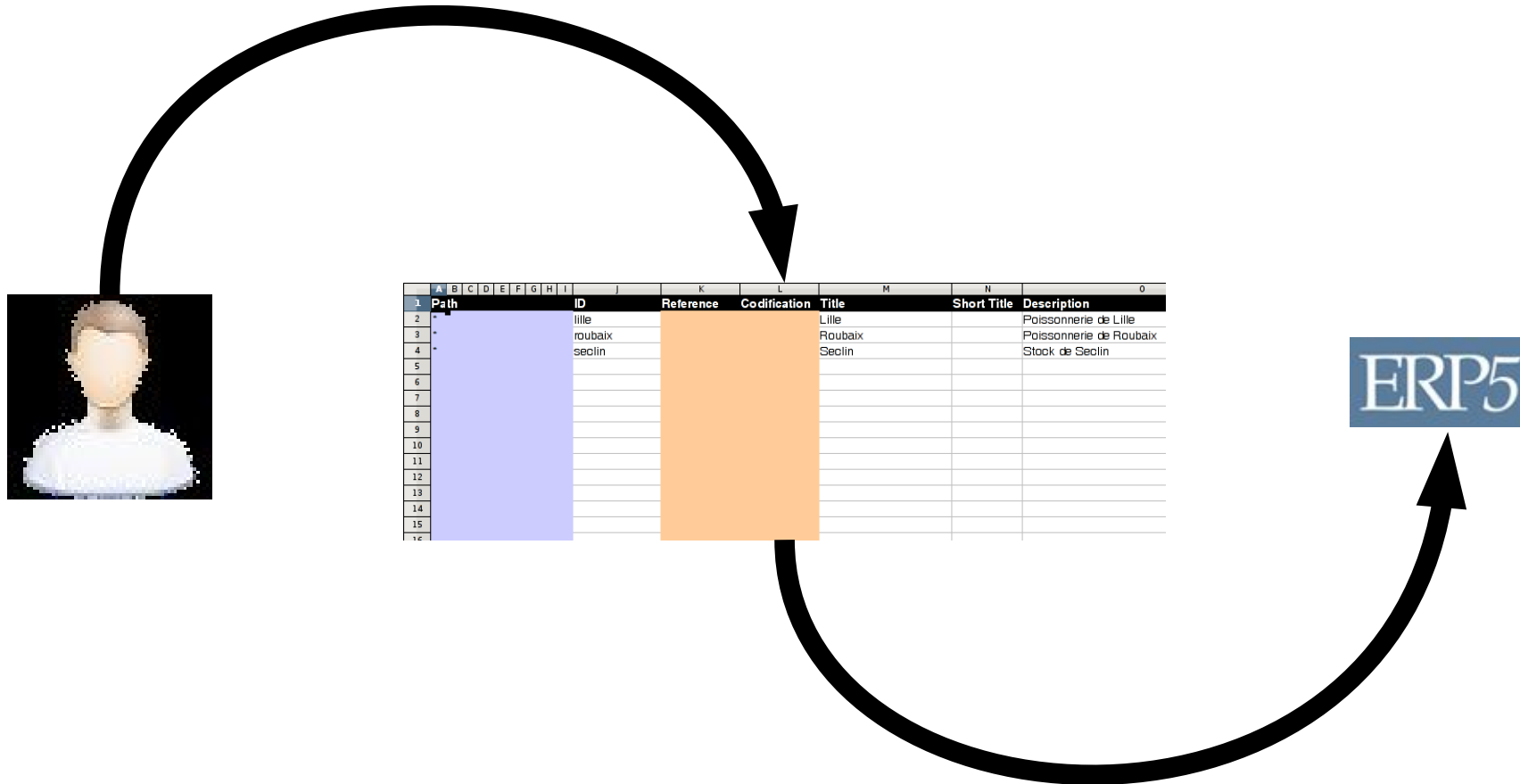- How to distinguish the different categories from each other.

Why should you read?

ERP configuration:

A B C D E F G H I	J	K	L	M	N	O
Path	**ID**	**Reference**	**Codification**	**Title**	**Short Title**	**Description**
	lille			Lille		Poissonnerie de Lille
	roubaix			Roubaix		Poissonnerie de Roubaix
	seclin			Seclin		Stock de Seclin

Preceding Steps

First, ensure to read through the OSOE introduction "00-P-OSOE-Young-Conultant Program-001-en.pdf"

Ensure you completed the steps outlined in the introduction:

- Find a company

- Work through the tutorials to understand ERP-Systems

- Register at www.tiolive.com (Company Name: First and last Name i.e. 'John Doe')

ERP5

Categories?

Path						ID	Reference	Codification	Title	Short Title
*						sales			Sales and Distribution	Sales
	*					agent			Sales Agent	Agent
*						marketing			Marketing	Marketing
	*					agent			Marketing Agent	Agent
*						company			Company	Company

`⟨ ▶ ⟩ ⟨ ▶I ⟩` \ Site / Group \ **Function** / Role / Grade / Region / Skill / Nationality / Activity / Publication Section / Product Line /

Categories are used to configure an ERP.

The company's facets are represented by those categories, which are configured in a spreadsheet.

ERP5

Fill the lines...

My company is called Maxma,
and has no subsidiary...

	ID	Reference	Codification	Title	Short Title	Description
	maxma			Maxma Group		Maxma Group represents Maxma company.

```
ID              : maxma
Title           : Maxma Group
Short Title  :  Maxma
Description : Maxma Group is used to
                  represent all Maxma Company.
```
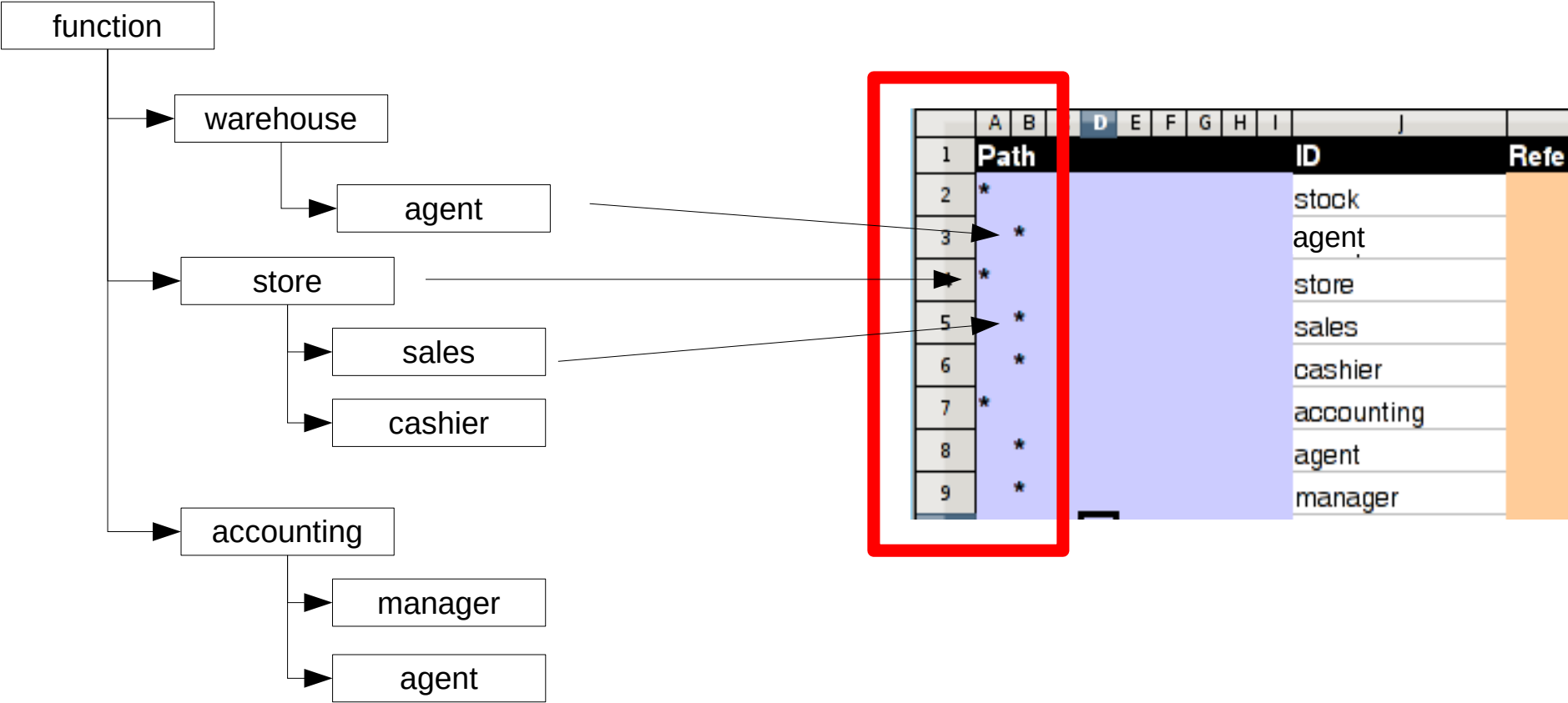
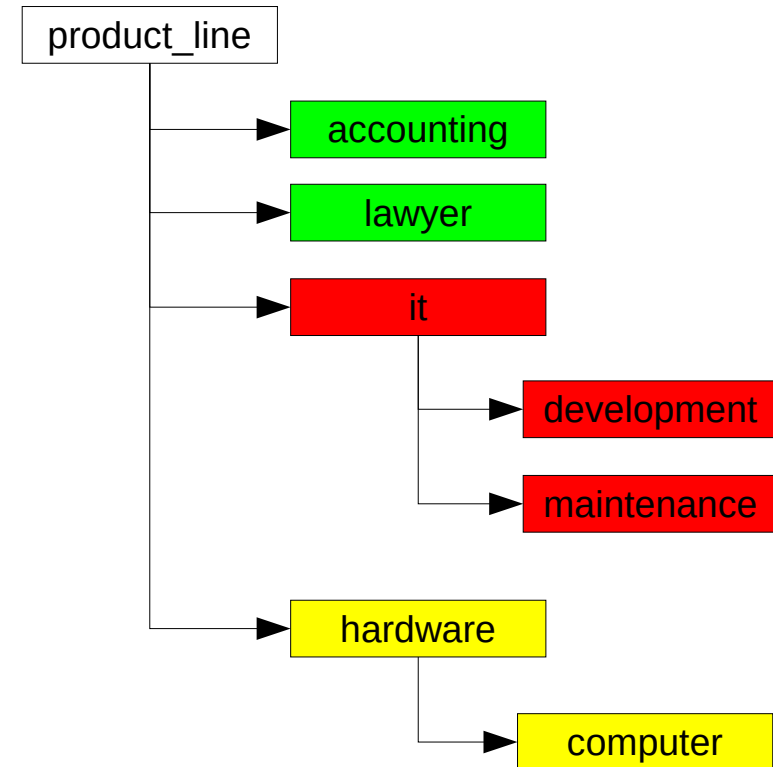Id has to consist of small letters without special characters.

Reference and Codification are not to be filled.

Always add a description to the line!

ERP5

Describe Categories Hierarchy

You vs. External World

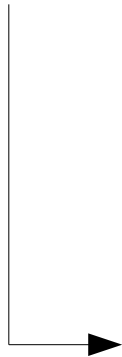I should fill only
Information
about myself?

Kind of Products/services that I buy

Kind of products/services that I sell

Kind of products that I buy and sell

product_line

accounting

lawyer

it

development

maintenance

hardware

computer

ERP5

Configuration Scope

I am implementing ERP for special functionalities only. Do I still have to configure each category?

ERP
- Accounting
- Crm
- Decisional
- Finance
- Payroll
- Manufacturing
- Project

Still, all categories have to be filled.

Category Details

Site / Group \ **Function** / Role / Grade / Region / Skill / Nationality / Activity / Publication Section / Product Line /

Site	The places the organization is operating in.
Group	Hierarchy of organizational structures based on subordination.
Function	The structure of the organization and it's staff based on function.
Role	Defining the roles the contacts can have.
Grade	Hierarchy of ranks in the company.
Region	Structure of the environment
Skill	Hierarchy of abilities in the organization.
Nationality	List of Nationalities.
Activity	Hierarchy of industrial activities.
Publication Section	Grouping of documents based on the nature of the document.
Product Line	Hierarchy of products an services.

ERP5

Site

Physical sites of the organisation.

Sites can be f. E. shops, warehouses, or factories.

My Company is placed in Rio de Janeiro but we have an office in Sao Paulo as well.

site
→ rio_de_janeiro
→ sao_paulo

I have 2 companies in Sao Paulo.

site
→ sao_paulo

I have 2 offices in Sao Paulo, one in Mocca one in Jardins.
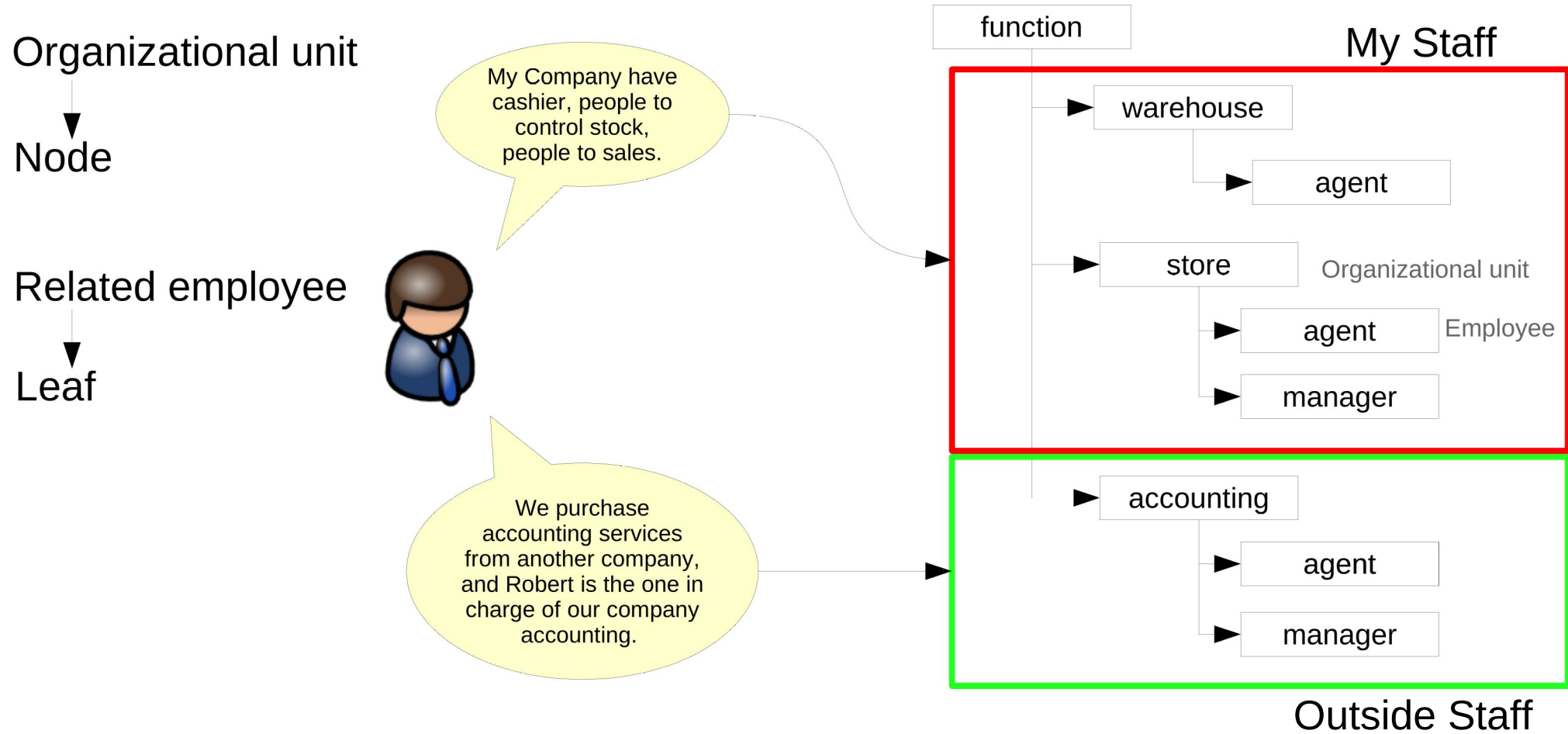
site
→ sao_paulo
→ mocca
→ jardins

Group

Juridical structure of your organisation with its subsidiaries and business units.

Can be used for example together with site and group to define positions in a company. Can also be used to implement analytical accounting based on profit centers.

Function

Organizational unit

↓

Node

Related employee

↓

Leaf

function

My Staff

My Company have cashier, people to control stock, people to sales.

warehouse

► agent

► store   Organizational unit

► agent   Employee

► manager

We purchase accounting services from another company, and Robert is the one in charge of our company accounting.

► accounting

► agent

► manager

Outside Staff

Role

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Define the roles of the persons in and outside of the company.
Use only flat leafs, no hierarchy here.

Standard roles are:

internal, external, client, supplier, administration, (sales) lead, (sales) prospect, media, member, user

Are these roles used in your case? Are there more or different roles?

ERP5

Grade

Define the Hierarchy of grades.
The detail level depends on the company's size. Very large organizations (i.e. governmental institutions) may use them for salary adjustment.

Small organizations:

Grades:
    employee
    (cadre)
    trainee
    owner

I have a medium sized organization, referring to a collective labour agreement for payment. Should I put these levels in grades?

ERP5

Region

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Defines the regions from your organization's point of view.

Standard:

Hierarchy with the five main groups:
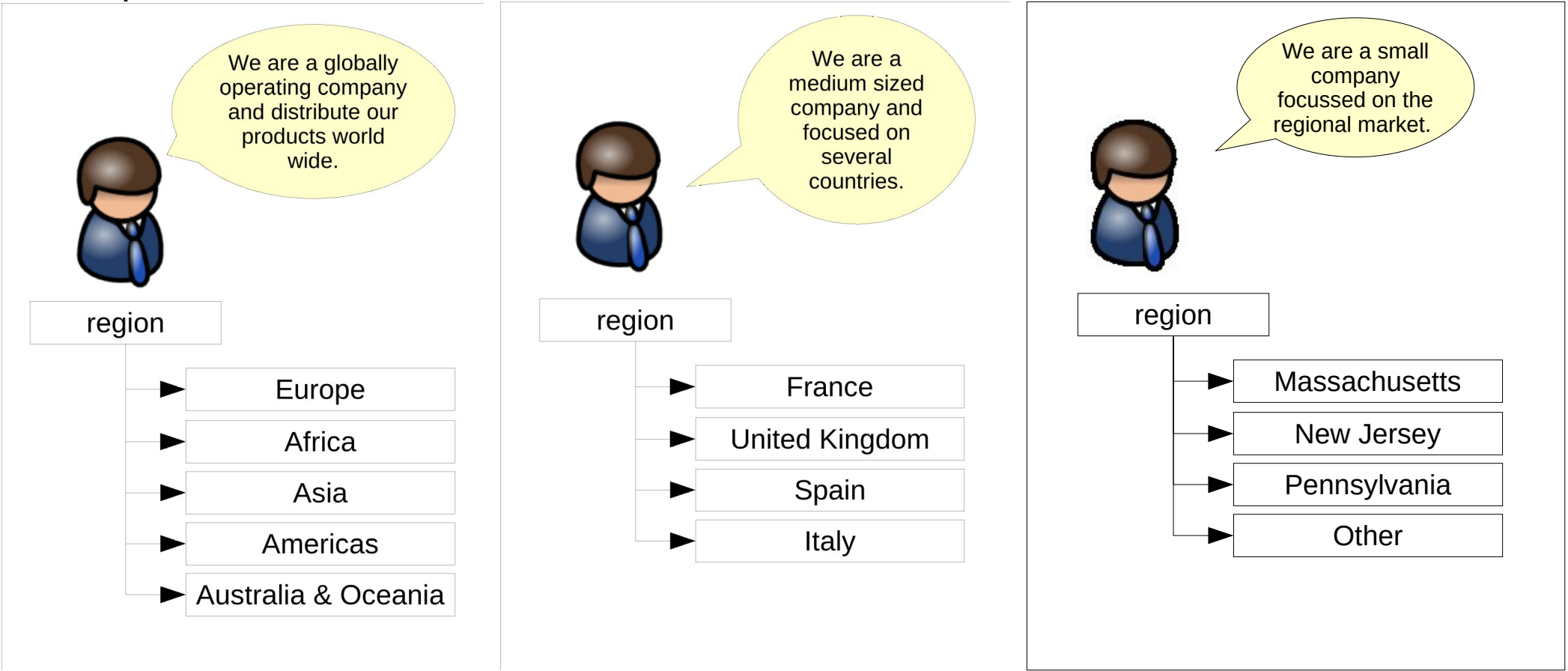Africa
Americas
Asia
Europe
Oceania

Are all continents / countries / states needed in your case?

Fill only the areas / countries your organization interacts with.

ERP5

Region

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Examples:

We are a globally operating company and distribute our products world wide.

region
► Europe
► Africa
► Asia
► Americas
► Australia & Oceania

We are a medium sized company and focused on several countries.

region
► France
► United Kingdom
► Spain
► Italy

We are a small company focussed on the regional market.

region
► Massachusetts
► New Jersey
► Pennsylvania
► Other

ERP5

Skill

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Define the hierarchy of the skills available in your organization.

Standard:

Possible Skill Categories:
- Foreign Languages
- Design
- Information Technology
- Project Management
- Sales
- Purchase
- Marketing
- Administration
- Accounting
- Production Management
- Personal Management
- Legal

Are all skill categories available / needed in you organization? Are there additional ones?

Which detailed skills are allocated in the categories in your organization?

ERP5

Nationality

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Define the nationalities. The standard list was set up by the United Nations.

Standard:

Hierarchy with the five main groups:
- Africa
- Americas
- Asia
- Europe
- Oceania

Take the full list of nationalities, because future customers might be insulted if their nationality is not implemented.

Check whether translations are necessary.

ERP5

Activity - industry segments

Define a hierarchy of industrial activities of your organisations and your contacts.

Standard main activity groups:

Agriculture & forestry
Fishing & aquaculture
Mining & quarrying
Manufacturing
Electricity, gas & water
Construction
Wholesale & retail trade; motor vehicles
Hotels & restaurants
Transport, storage & communications
Financial inter mediation except insurance
Real estate, renting & business activities
Public administration & defence
Education
Health & social work
Other community, social & personal services
Activities of private households
Extraterritorial organizations & bodies

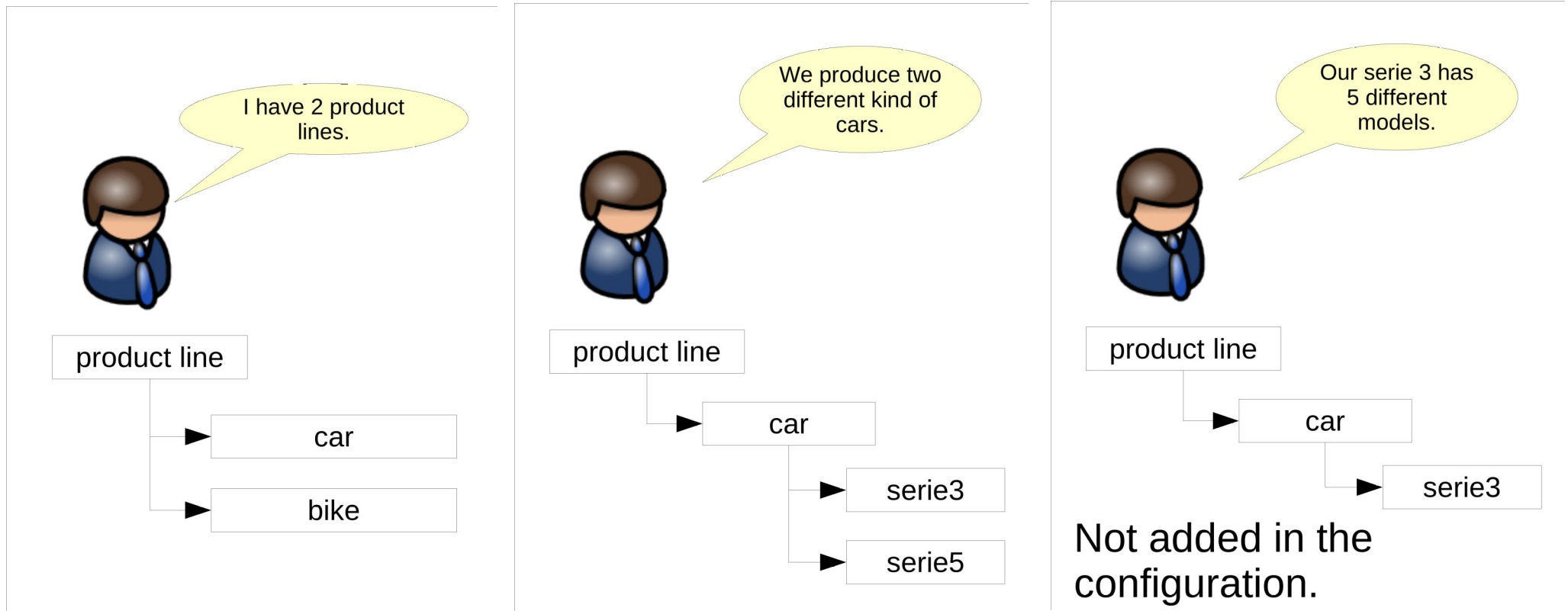Look at the detailed list of activities provided by the standard categories to get an idea of a possible structure.

Keep in mind that the activities are very general. Specify more detailed activities based on the general activities provided.

Activity - industry segments

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Examples:

Fish Shop

Path					ID			Title
*					familiy			Family
*					restaurant			Restaurant
*					service			Service
	*				it			IT
	*				legal			Legal and Tax
*					seafood			Fish
	*				tool			Tooling and clothing
	*				fishing			Fishing
	*				packaging			Packaging
	*				trade			Fish Trade
	*				retail			Fish Retail
	*				processing			Processing
*					food			Food
	*				retail			Food Retail
	*				wholesale			Food Wholesales
*					stationnery			Stationnery

Energy Provider

Path					ID			Title
*					bildung			Bildungswesen
*					industrie			Industrie
	*				energie			Energie
		*			netzbetreiber			Netzbetreiber
		*			messstellenbetreiber			Messstellenbetreiber
		*			zulieferer			Stromzulieferer
		*			verband			Verband
	*				bank			Bank
	*				versicherung			Versicherung
	*				it			Information Technology
	*				logistic			Logistic
	*				marketing			Marketing
*					verwaltung			Verwaltung
	*				stadt			Stadt
	*				region			Region
*					umwelt			Umweltorganisation
*					energieprojektierer			Energieprojektierer

ERP5

Publication Section

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Define groups of documents based on their nature.

Standard Publication Sections:

marketing
financial
quality
sale
purchase
technical
project
administration
news
press
documentation
rd
hr
operation
template
other
legal

Look at the detailed list of publication sections provided by the standard categories to get an idea of a possible structure.

Which of them are used in your organization?

Check for additional publication sections.

ERP5

Product Line

Define the hierarchy of products / services your organization provides.

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Grading of the Configurations

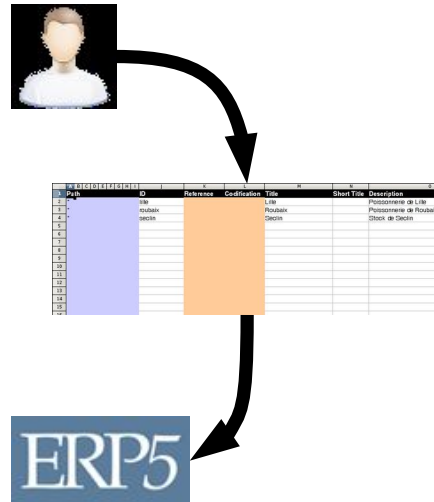The configurations are graded by the tutor based on how clear the company is modeled in the configuration.

Columns that have to be corrected by the tutor are penalized.

For both, questionnaire and configuration filling, you get the possibility to improve the answers and configuration based on the comments made by the tutor. Although you get two marks (one after the first submission and one after your correction of the results) only the second mark is relevant for your final grading. As a result, it is possible the reach the maximum number of points if the correction of the configuration is done properly.

ERP5

ERP5 Categories Spreadsheet

This guide will teach you:

- What you need categories for.
- How to fill categories into Spreadsheet.
- How to distinguish the different categories from each other.

This visual guide has been created for learning and for teaching ERP design. This visual guide can be used as reference to understand current ERP5 design and future directions. It is mostly useful to ERP5 developers who need to understand ERP5 roadmap and to marketing people who need to explain ERP5 architecture and roadmap.

For learning ERP5 alone, readers should first have a quick look at the illustration on the upper part of the page then read the text bellow carefully and associate each word written in bold to the corresponding item(s) in the illustration. For example, the term **Creative Commons License** is written in bold because it defines the license of the above illustration.
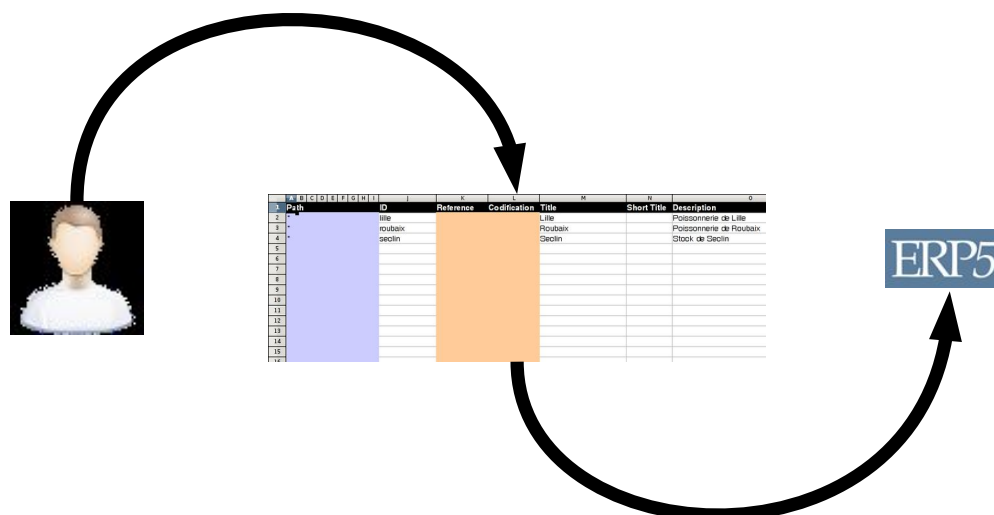
Please request a license for any commercial use of this document.

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You are free to copy, distribute, display, and perform the work under the following conditions: you must attribute the work in the manner specified by the author or licensor; you may not use this work for any commercial purposes including training, consulting, advertising, self-advertising, publishing, etc.; you may not alter, transform, or build upon this work.

For any reuse or distribution, you must make clear to others the license terms of this work. Any of these conditions can be waived if you get permission from the copyright holder through a commercial license or an educational license. For more information, contact info@nexedi.com

Why should you read?

ERP configuration:

This guide will teach you how to configure an ERP system. Spreadsheets are used to transfer the configuration information from the real world into the ERP5 system.

The guide will teach you how to fill the spreadsheet. The visual guide contains general advice as well as a detailed description of each category.

Preceding Steps

First, ensure to read through the OSOE introduction "00-P-OSOE-Young-Conultant Program-001-en.pdf"

Ensure you completed the steps outlined in the introduction:

• Find a company

• Work through the tutorials to understand ERP-Systems

• Register at www.tiolive.com (Company Name: First and last Name i.e. 'John Doe')

ERP5

Ensure to read through the OSOE introduction and ensure to complete the outlined steps before you continue filling the questionnaire.

Categories?

Path						ID	Reference	Codification	Title	Short Title
*						sales			Sales and Distribution	Sales
	*					agent			Sales Agent	Agent
*						marketing			Marketing	Marketing
	*					agent			Marketing Agent	Agent
*						company			Company	Company

Site / Group \ **Function** / Role / Grade / Region / Skill / Nationality / Activity / Publication Section / Product Line /

Categories are used to configure an ERP.

The company's facets are represented by those categories, which are configured in a spreadsheet.

What are categories and what are they used for?

Categories are facets of the organization that is modelled. All facets are bundled in one configuration spreadsheet. In order to configure the ERP system, each facet has to be configured. They are found in the bottom bar of OpenOffice Calc.

Fill the lines...

My company is called Maxma,
and has no subsidiary...

ID	Reference	Codification	Title	Short Title	Description
maxma			Maxma Group		Maxma Group represents Maxma company.

ID   : maxma
Title   : Maxma Group
Short Title : Maxma
Description : Maxma Group is used to
                    represent all Maxma Company.

Id has to consist of small letters without special characters.

Reference and Codification are not to be filled.

Always add a description to the line!

To configure a facet, it's lines have to be filled.

Each facet has the columns ID, Reference, Codification, Title, Short Title and Description. The orange fields don't have to be filled, therefore only ID, Title, Short Title and Description remain. Keep in mind that ID always has to consist of small letters without special characters. It's important to add a description to each line to provide information about the entity in the ERP system.

Describe Categories Hierarchy
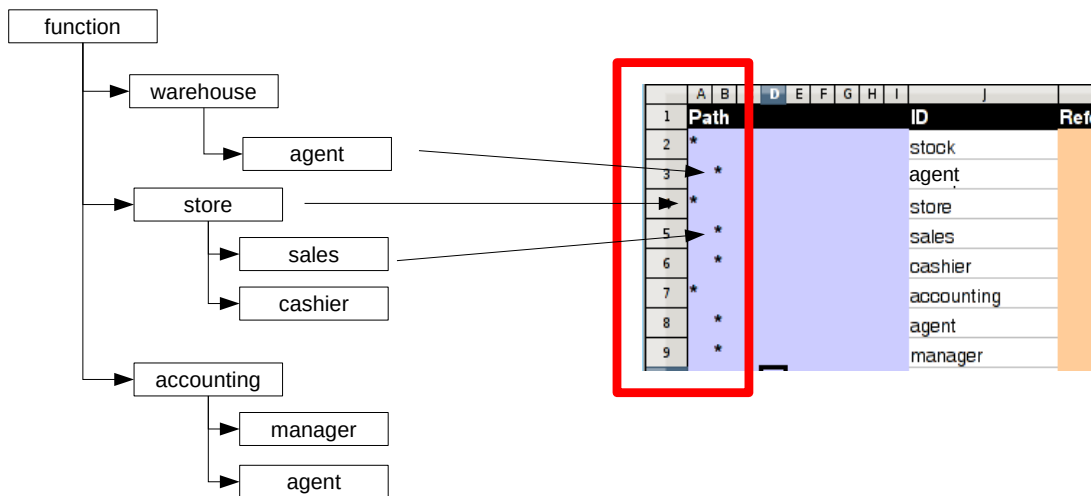
The first columns are reserved for hierarchy adjustment. Hierarchies are set by adjusting star characters in the first rows based on the Object hierarchy depth. In the example provided the transport function is a subordinate of the stock function. Therefore, the stock line's star is in the first column and the transport star is adjusted in the second column. The required hierarchy depth depends on the category facet. The goal is always to model the company as accurately as possible. If more detail is needed, the configuration enables you to model hierarchies with a maximum depth of seven.
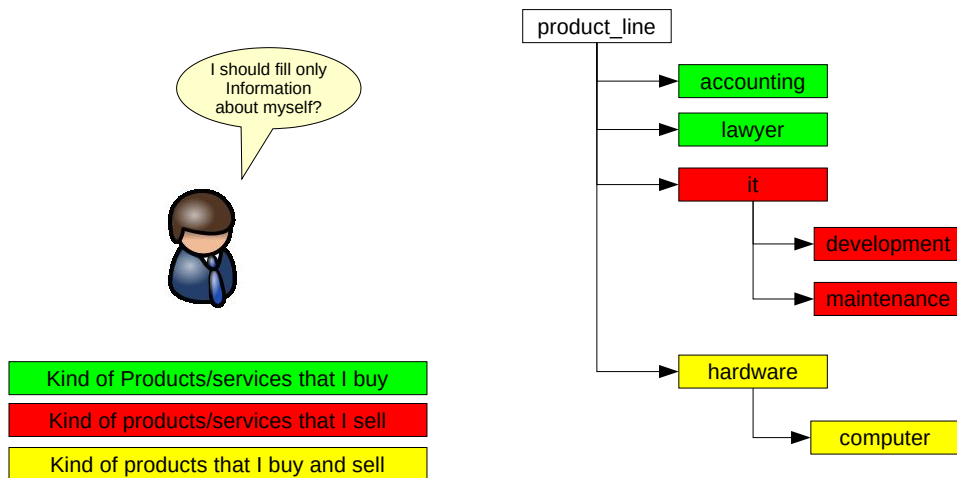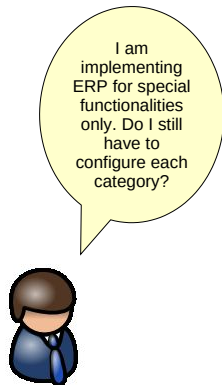
You vs. External World

Each organization has corresponding partners. In order to configure your organization's ERP system, not only the organization itself has to be modelled. Additionally, the corresponding clients and producers from the external world need to be included in the modelling process. As a consequence, the configuration needs to encompass your company's objects, as well as the related objects from the external world.

Configuration Scope

I am implementing ERP for special functionalities only. Do I still have to configure each category?

📁 ERP
    📁 Accounting
    📁 Crm
    📁 Decisional
    📁 Finance
    📁 Payroll
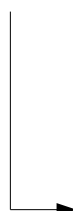   📁 Manufacturing
    📁 Project

Still, all categories have to be filled.

A company can use ERP5 for all its processes or for parts only. The grade of how much is covered is referred to as scope. For example, a company could use ERP5 for the sales department only. Still, the configuration has to be done for all parts of the company.

Category Details

Site / Group \ **Function** / Role / Grade / Region / Skill / Nationality / Activity / Publication Section / Product Line /

|	
Site	The places the organization is operating in.
Group	Hierarchy of organizational structures based on subordination.
Function	The structure of the organization and it's staff based on function.
Role	Defining the roles the contacts can have.
Grade	Hierarchy of ranks in the company.
Region	Structure of the environment
Skill	Hierarchy of abilities in the organization.
Nationality	List of Nationalities.
Activity	Hierarchy of industrial activities.
Publication Section	Grouping of documents based on the nature of the document.
Product Line	Hierarchy of products an services.

The shown categories have to be filled. The following slides will discuss the different facets in more detail.
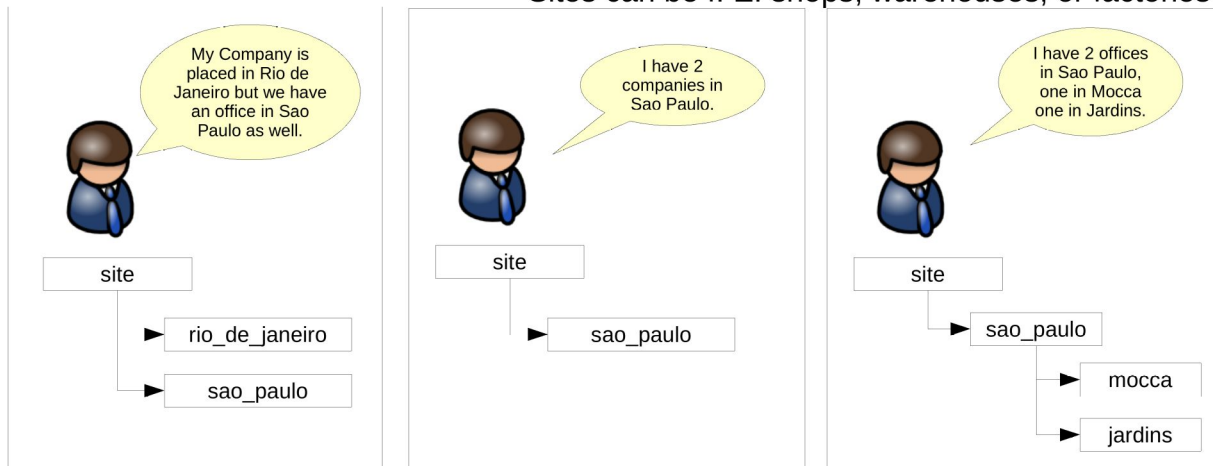
In this sheet, define the physical sites of the organisation. Sites are structured as a tree of sites with children sites. The level of detail may be different from one site to another. For example, a small retail site may be known only by its city or region name. A factory may on the contrary describe 6 levels of hierarchy, from the regional name to the identifier of a storage cell in one of multiple warehouses of the factory.

If reporting is needed on groups of sites, then it can be useful to group sites per regions based on the reporting requirements.

It is preferable to use region than cities. This will eliminate the need for changes in case an office moves from one city to another.
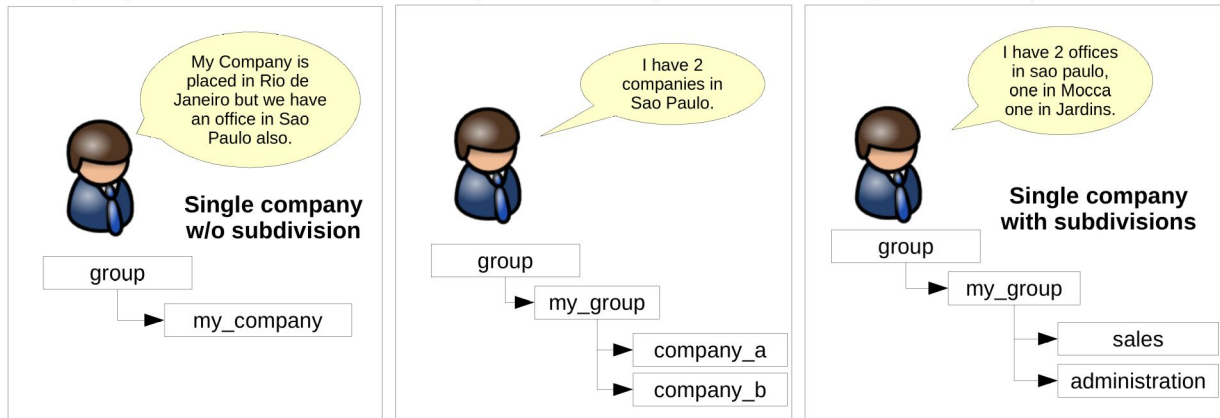
Security codes must be defined for a selection of sites, at an appropriate grain level. It would be for example useless to define different securities based on the storage cell of a warehouse. However, it can be useful to differentiate security permissions for each warehouse of the same factory. A warehouse clerk of warehouse A may be prevented from entering inventories for warehouse B.

Group

| Site | Group | Function | Role | Grade | Region | Skill | Nationality | Activity | Publication Section | Product Line |

Juridical structure of your organisation with its subsidiaries and business units.
Can be used for example together with site and group to define positions in a company. Can also be used to implement analytical accounting based on profit centers.

My Company is placed in Rio de Janeiro but we have an office in Sao Paulo also.

Single company w/o subdivision

group → my_company

I have 2 companies in Sao Paulo.

group → my_group → company_a, company_b

I have 2 offices in sao paulo, one in Mocca one in Jardins.

Single company with subdivisions

group → my_group → sales, administration

In this sheet, define the juridical structure of your organisation with its subsidiaries and business units. This juridical structure will be used of analytical accounting. If the organisation is simple, a single group is enough.

Also define in this sheet your own vision on the structure of third party business entities (clients, suppliers, partners) with your own view on how they are structured. For example, if you have some business with a group of companies named "*partner_group*", you may want to differentiate its 2 entities (info service and ff cleaning), especially if only info service employee are your partners and if they are allowed to access your own ERP5 system within a specific partnership contract which grants them access to some documents.

Just as for site, security codes must be defined at reasonable granularity level. It is useful to differentiate entities with different security. It is useless to define different codes for entities which share the same security policies.
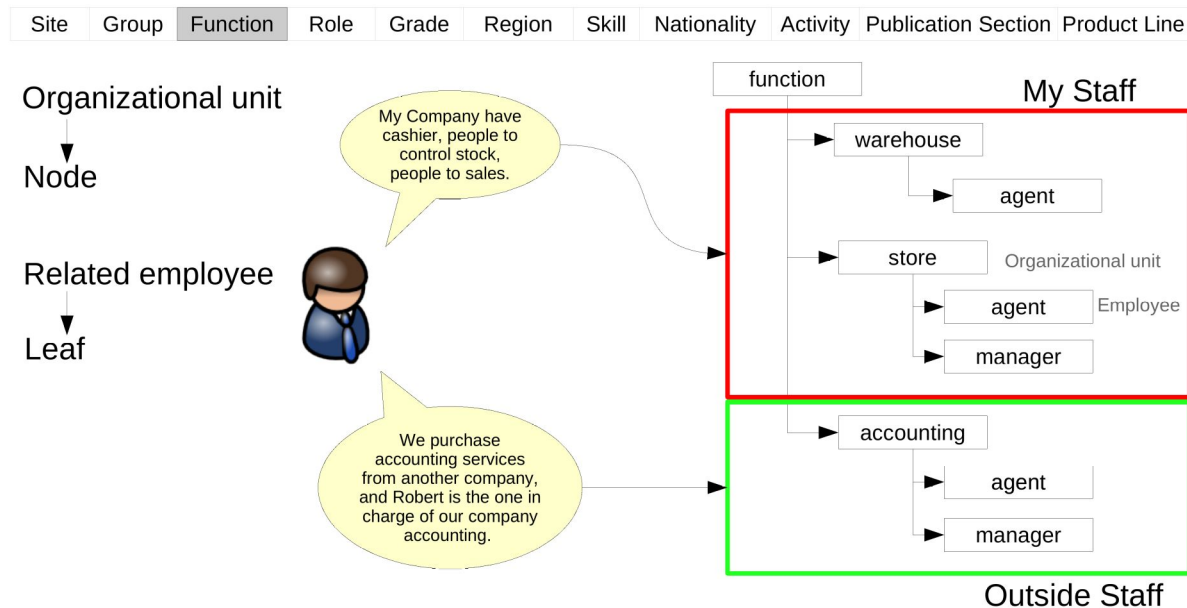
In this sheet, describe the functional structure of your organisation and of organisations you are in business with.

Organisation functions are implemented by nodes (ex. factory, warehouse, factory/warehouse) of the function tree. Person functions are implemented by leaves (ex. factory/manager, lab/director).

Please make sure you understand the difference between grade and function. For example, a person whose grade is *director of research* may be assigned a function of *factory manager*. Think of grades as in an army (ex. general, commander) and of functions as assigned missions (ex. researcher, spy).

Role

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Define the roles of the persons in and outside of the company.
Use only flat leafs, no hierarchy here.

Standard roles are:

internal, external, client, supplier, administration, (sales) lead, (sales) prospect,
media, member, user

Are these roles used in your case? Are there more or different roles?

In this sheet, describe the roles of the organization. Employees have different roles in the company. A possible configuration is:

- internal: A company, an office or a person within the company group

- client:A client which buys goods or services from the company group

- supplier: A supplier which provides goods or services to the company group

- administration: An administrative body (ex. tax office, registration office)

- sales lead: A person or an organisation that is potentially interested in purchasing a product or service from the company group (first stage in sales process)

- sales prospect: A person or an organisation that is interested in purchasing a product or service from the group (qualified sales lead)

These roles are proposals and have to be checked for completeness and applicability in your company.

Grade

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Define the Hierarchy of grades.
The detail level depends on the company's size. Very large organizations (i.e. governmental institutions) may use them for salary adjustment.

Small organizations:

Grades:
employee
(cadre)
trainee
owner

I have a medium sized organization, referring to a collective labour agreement for payment. Should I put these levels in grades?

ERP5

Grade describes the position in an organisation from a *honorific* point of view. Salary is also usually based on grade, rather than on function.

Typical example of grade are *General*, *Commander* in the army. Some army Generals are sometimes assigned to research management functions. Their grade is still general but their function is Director of R&D Center.

There is no direct relation between grade and function.

Grades differ from function in the sense that function describes actual operational position while grade describes a honorific position.

Region

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Defines the regions from your organization's point of view.

Standard:

Hierarchy with the five main groups:
    Africa
    Americas
    Asia
    Europe
    Oceania

Are all continents / countries / states needed in your case?

Fill only the areas / countries your organization interacts with.

ERP5

Please fill here the list of regions and counties in the world according to your point of view.

UNO standards exist for this. However, they do not cover business concepts such as EMEA (Europe, Middle East, Asia). Moreover, the choice of a list of regions includes both commercial and political consequences.

For example, it is usual when sending a letter to Barcelona to locate Barcelona in Catalunya, Espagne (French is the standard for international mail). This would not be the case in France where few people consider writing to someone in Lyon, Rhone-Alpes, France but would write to someone in Lyon, France.

Consider also the case of Corsica which is more sensitive, or of any region in which part of its inhabitants consider that they belong to a country which aims at becoming independent from what they view as an occupation force. There numerous examples of this kind, including Taiwan which is a major industrial country and which is not considered as such by UNO.

Another example is Japan, which most inhabitants consider that they are not part of Asia (China is part of Asia for them). Doing business in Asia often requires a special treatment for Japan, which is considered as a continent on its own, whereas China influenced countries are put in a single group.
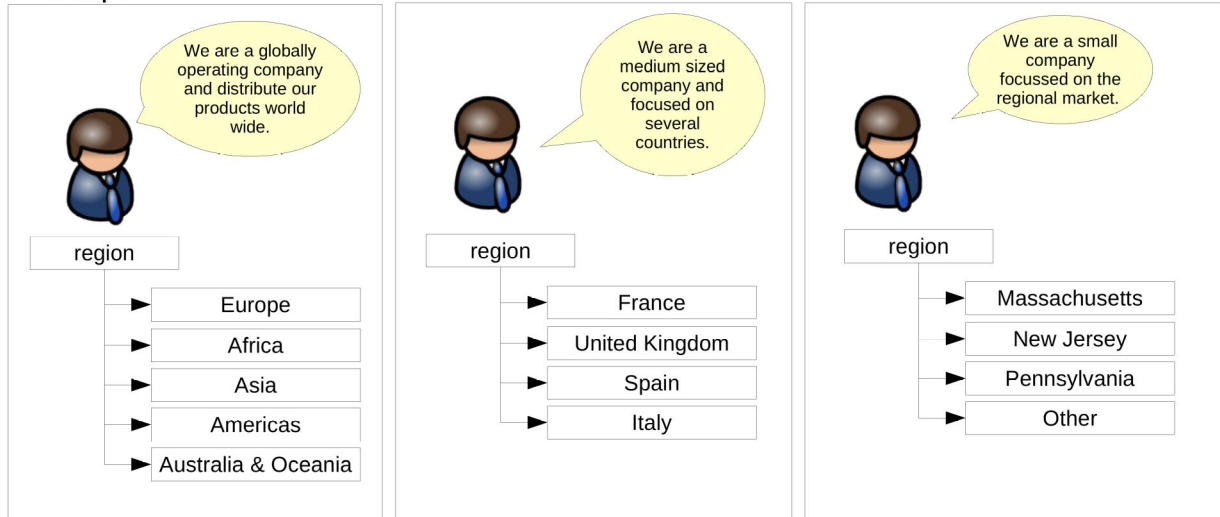
We advice you making your own classification of regions in the world and making it as independent as possible of future changes (will Taiwan be part of China in 10 years ? will New Caledonia become independent in 5 years ?). Geopolitics may evolve, but business remains.

Regions need also sometimes a higher level of precision, but not uniformly. A European business does not care about states in the USA. However, a USA business needs to keep track of its clients based on the state information. USA states should therefore appear in the region category for a USA business. The

Region

| Site | Group | Function | Role | Grade | Region | Skill | Nationality | Activity | Publication Section | Product Line |

Examples:

We are a globally operating company and distribute our products world wide.

region
- Europe
- Africa
- Asia
- Americas
- Australia & Oceania

We are a medium sized company and focused on several countries.

region
- France
- United Kingdom
- Spain
- Italy

We are a small company focussed on the regional market.

region
- Massachusetts
- New Jersey
- Pennsylvania
- Other

The provided examples show three basic configurations:

International organizations may consider structuring the regions into continents. The hierarchy can be more detailed on the second level. For example, Europe could be further divided into northern and southern Europe or relevant countries.

Organizations and companies, which are focused on several countries could consider structuring the regions into that countries.

Small companies with local market alignment may structure their regions based on smaller geographical units like states. It is possible to combine the level of modelling granularity by using the hierarchy. The level of detail depends on the requirements of your company.

Remaining markets could be assigned to a "Other" or "Rest of World" region group.

Skill

| Site | Group | Function | Role | Grade | Region | Skill | Nationality | Activity | Publication Section | Product Line |

Define the hierarchy of the skills available in your organization.

Standard:

Possible Skill Categories:
Foreign Languages
Design
Information Technology
Project Management
Sales
Purchase
Marketing
Administration
Accounting
Production Management
Personal Management
Legal

Are all skill categories available / needed in you organization? Are there additional ones?

Which detailed skills are allocated in the categories in your organization?

Please fill the list of skills which you want to associate to Person in order to qualify them.

First consider people inside your organisation and their skills. Afterwards consider people outside your organisation and the skills they provide to your organisation.

Nationality

| Site | Group | Function | Role | Grade | Region | Skill | Nationality | Activity | Publication Section | Product Line |

Define the nationalities. The standard list was set up by the United Nations.

Standard:

Hierarchy with the five
main groups:
    Africa
    Americas
    Asia
    Europe
    Oceania

Take the full list of nationalities, because future customers might be insulted if their nationality is not implemented.

Check whether translations are necessary.

It's time to fill the list of nationalities in the world according to your point of view.

UNO standards exist for this. However, they do not cover all nationalities. For example, the nationality of a Chinese from mainland and a Chinese from HK is treated quite differently by immigration services in Western Europe.

A person from Taiwan is considered as Taiwanese by some people and as Chinese by others. His or her passport mentions *republic of china*. Addressing to a Taiwan inhabitant as he or she was Chinese can sometimes create a lot of frustration.

Another interesting case is the case of group of counties (EU, CEDEAO, etc.) which inhabitants carry a passport with a dual mention: the group of countries and the country itself.

We advice you to define your own view on nationalities so that it serves best your business needs.

Activity - industry segments

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Define a hierarchy of industrial activities of your organisations and your contacts.
Standard main activity groups:

Agriculture & forestry
Fishing & aquaculture
Mining & quarrying
Manufacturing
Electricity, gas & water
Construction
Wholesale & retail trade; motor vehicles
Hotels & restaurants
Transport, storage & communications
Financial inter mediation except insurance
Real estate, renting & business activities
Public administration & defence
Education
Health & social work
Other community, social & personal services
Activities of private households
Extraterritorial organizations & bodies

Look at the detailed list of activities provided by the standard categories to get an idea of a possible structure.

Keep in mind that the activities are very general. Specify more detailed activities based on the general activities provided.

Activities describe your view on all possible economic activities in the world. There are UNO, European standards for activities. However, it is better to define your own classification based on specific business requirements

Activities are different from function. Activities usually relate to a classification of third parties based on the nature of their industry (ex. banking, IT, automotive) whereas function is independent of the activity (i.e. both an IT and an automotive company can have entity which has the function of a warehouse).

Activity - industry segments

| Site | Group | Function | Role | Grade | Region | Skill | Nationality | Activity | Publication Section | Product Line |

Examples:

Fish Shop

Path				ID			Title
*				familiy			Family
*				restaurant			Restaurant
*				service			Service
	*			it			IT
	*			legal			Legal and Tax
*				seafood			Fish
	*			tool			Tooling and clothing
	*			fishing			Fishing
	*			packaging			Packaging
	*			trade			Fish Trade
	*			retail			Fish Retail
	*			processing			Processing
*				food			Food
	*			retail			Food Retail
	*			wholesale			Food Wholesales
*				stationnery			Stationnery

Energy Provider

Path				ID			Title
*				bildung			Bildungswesen
*				industrie			Industrie
	*			energie			Energie
		*		netzbetreiber			Netzbetreiber
		*		messstellenbetreiber			Messstellenbetreiber
		*		zulieferer			Stromzulieferer
		*		verband			Verband
	*			bank			Bank
	*			versicherung			Versicherung
	*			it			Information Technology
	*			logistic			Logistic
	*			marketing			Marketing
*				verwaltung			Verwaltung
	*			stadt			Stadt
	*			region			Region
*				umwelt			Umweltorganisation
*				energieprojektierer			Energieprojektierer

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Publication Section

Site	Group	Function	Role	Grade	Region	Skill	Nationality	Activity	Publication Section	Product Line

Define groups of documents based on their nature.
Standard Publication Sections:

marketing
financial
quality
sale
purchase
technical
project
administration
news
press
documentation
rd
hr
operation
template
other
legal

Look at the detailed list of publication sections provided by the standard categories to get an idea of a possible structure.

Which of them are used in your organization?

**Check for additional publication sections.**

Please fill here the list document types in your company.

A document type is for example: a contract, a status report, a letter, etc. The different document types which are involved in your daily business can be stored in the ERP, either autonomously (ex. Letter) or in relation with a business document (ex. a specification document can be used to support a Sale Order).

Product Line

Site | Group | Function | Role | Grade | Region | Skill | Nationality | Activity | Publication Section | **Product Line**

Define the hierarchy of products / services your organization provides.
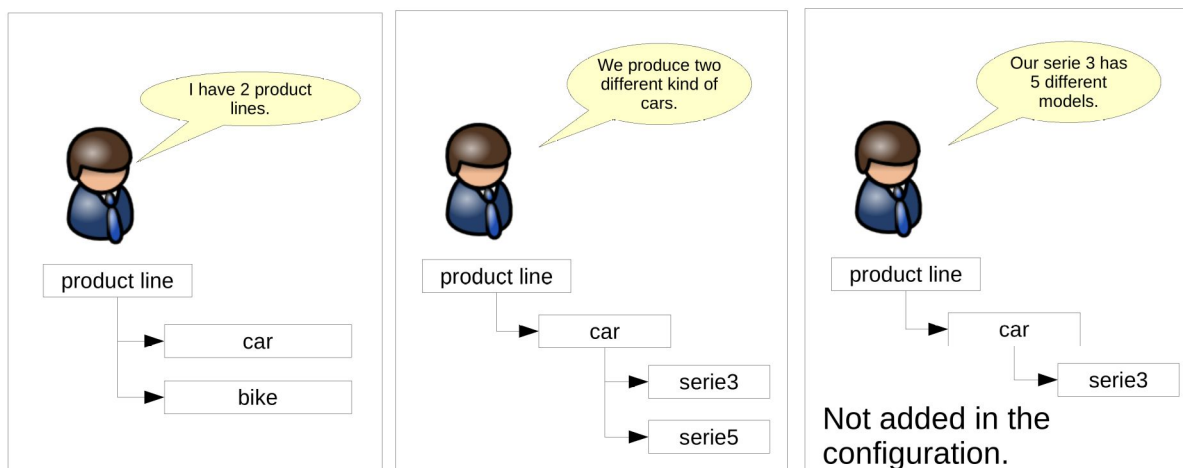
Please fill here the list of product lines sold or purchased by your company.

Product lines are used for both purchase and sales. They are useful to create a catalogue of products (sold or purchased) and to structure a large database of products and services by families.

Grading of the Configurations

The configurations are graded by the tutor based on how clear the company is modeled in the configuration.

Columns that have to be corrected by the tutor are penalized.

For both, questionnaire and configuration filling, you get the possibility to improve the answers and configuration based on the comments made by the tutor. Although you get two marks (one after the first submission and one after your correction of the results) only the second mark is relevant for your final grading. As a result, it is possible the reach the maximum number of points if the correction of the configuration is done properly.

ERP5

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