

# ERP Configuration Lecture

*Generic 2023*

## Goals

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The goal of this ERP class is to teach how to configure an ERP for a small company or for a non profit organisation, hereby call the “**implementation field**”. The configuration process is based on a questionnaire and a spreadsheet. It is desirable for this configuration to be as simple and concise as possible. The notation of the exam will depend on your ability to precisely define the nature of the implementation field, to identify the goals of the implementation field w.r.t. ERP implementation and to define taxonomies, a.k.a. “categories”, which are suitable to reach such goals.

Your work will therefore consist of:

1. fill in this document all parts which are marked with XXX and provide relevant information;
2. fill the spreadsheet [TIO-Configuration.Template-001-en](#) with categories which are suitable for the implementation field.

Whenever your answers are precise, concise and show that you are capable of understanding the ERP related management stakes and issues which are relevant for the implementation field, you will get the maximum number of points. Whenever your answers are long, confusing or do not show any understanding of management issues in relation with ERP implementation, you will receive no points. **Answers must always be formulated as a sentence with subject, verb and complement.**

NB: any answer of the form “there is no need of an ERP” is not acceptable in this case. If your experimentation field does not need an ERP, find another implementation field.

## Duration

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An experienced consultant can complete this test (questionnaire and spreadsheet) in less than one hour. We expect that a beginner will be capable of finishing this exam in less than 4 hours.

## Student Identity

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Name: XXX  
Given Name: XXX  
Email: XXX

## Identity of the implementation field

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Nature (ex. corporation, non profit organisation, agency): XXX  
Name: XXX  
Country: XXX  
Number of employee or of permanent staff: XXX  
Number of sites: XXX

## Activity of the implementation field

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What does the implementation field sell, offer or produce? (10 line max.)  
XXX

What does the implementation field purchase, recycle, receives or uses? (10 line max.)  
XXX

Who are the contacts of the implementation field? (10 line max.)  
XXX

What are the typical skills and initial training of the staff? (10 line max.)  
XXX

## Management of the implementation field

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Please provide an example of management area or of business process which the implementation field is handling in a way which it considers itself as being good or successful. Explain what reasons make this business process or business area successful. (10 line max.)  
XXX

Please provide an example of management area or of business process which the implementation field is handling in a way which it considers itself as being poor or wrong, and which could be improved according to him or her. Explain from what point of view the management area or business process is currently not well implemented. (10 line max.)  
XXX

Explain what the implementation field expects from an ERP as 1<sup>st</sup> priority to improve its own management?  
XXX

Explain what the implementation field expects from an ERP as 2<sup>nd</sup> priority to improve its own

management?  
XXX

Explain what the implementation field expects from an ERP as 3<sup>rd</sup> priority to improve its own management?  
XXX

# Category Configuration Spreadsheet

Please fill each tab of the attached spreadsheet ([TIO-Configuration.Template-001-en](#)) by making sure that the taxonomy you design is relevant for the implementation field and help to meet its management goals. Comments are provided on each tab to help you understand the meaning.

## Hints

A sample spreadsheet is provided for a “fish retailer” in an urban area ([TIO-Configuration.Sample-001-en](#)).

**NB: make sure all columns, \*, ID and description are defined (1 point par category).**

1	Path	ID	Sort Index	Reference	Codification	Title	Short Title	Description
2	*	crustace				Crustacés		Huitres, moules, crevettes, etc.
3	*	frais				Crustacés frais		Huitre et moules fraîches
4	*	congele				Crustacés congelés		Crevettes congelées
5	*	poisson				Poisson		Poisson de mer ou d'eau douce
6	*	frais				Poisson frais		Poisson frais entier
7	*	congele				Poisson congelé		Poisson congelé entier ou découpé
8	*	outil				Outils		Outils consommables liés à l'activité des magasins de
9	*	couteaux				Couteaux		Couteaux et lames
10	*	bacs				Bacs		Bacs à poisson à date limite d'utilisation
11	*	emballage				Emballage		Emballages pour l'expédition ou la vente de détail
12	*	carton				Carton		Cartons d'emballage
13	*	isotherme				Emballage isotherme		Sacs isothermes
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Example of correct input (Path, ID, Title, Description)