

How to fill the Configuration Questionnaire

by [OSOE Project](#).

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Now we will focus on how to execute the interview and fill the questionnaire. This tutorial will show you what constitutes a good answer, and discuss the detailed questions.

Agenda

- How to provide high quality answers
- Question descriptions
- How to fill in answers on-line
- How to improve your answers

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What is a good answer?

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In order to provide high quality answers, the term "high quality answer" has to be defined in the context of the questionnaire. It is important to always provide the answers in full sentences, avoiding bullet lists. This results in more context information being available for later analysis. Using clear and simple language helps condensing information on explicit and meaningful sentences.

Executives often tend to describe the organization's situation in rather general statements. So please make sure to get explicit processes and cases.

What is a bad answer?

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What is a good answer - Example

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The first answer example shown is too generic. It shows issues (cost, inefficiency), but it gives no explicit case to improve. To make the answer more explicit, asking the 6-w questions (Who? What? Where? When? Why? How?) can help analyse the relevant facets of the described process. Still the aim is to get a cohesive description of the process.

Question description

The following slides describe how to answer the questions about the company in detail. For each question a number of sub questions is provided. Provide explicit processes rather than general statements.

Question description

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This question aims on identifying the output of the company, encompassing products, services or trading goods. Give the highest possible detail on what is sold (with hierarchy), where it is sold and to whom it is sold.

It is also possible to use ERP5 only for a department or special task in the organisation. In this case both the company's (generally) and the department's (detailed) products have to be documented.

Question description

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This question aims on identifying the input for the organisation. The input can be used, purchased or recycled by the

company.

If you only use ERP5 for a department or special task in the organisation, make sure to describe the inputs explicitly for both the whole company and the department ERP5 is used in.

Question description

▼ Details

Provide details about all the contacts the company has. Both suppliers and customers have contact persons with whom your company communicates. The goal is to get informations about the categories role, region, group and function so to analyse the contacts regarding these categories.

Analyse the company's contacts on the customer and supplier side. Your company may have other contact roles, so think of possible classifications (size, location,...?). It is possible that contacts are organized in hierarchies (like in large companies with many subsidiaries).

Question description

▼ Details

The aim of this question is to get information about the employees skills for the skill category. Ensure to take both skills inside and outside your company into consideration. It is possible to directly ask for the provided skill categories, but be aware that the company might have a individual skill structure. Make sure to list key and unique skills that are specific for the company you're analysing.

Question description

▼ Details

This question aims on identifying a process the company is handling successful. Ensure to describe an explicit process with humans interacting. Give as much detail as possible about the time span for each sub-process and point out why this is a benefit for the company.

Additionally asking the 5-w questions helps ensuring that all facets are considered.

Question description

▼ Details

This question aims on identifying a process the company is handling wrongly. Describe an explicit process with humans interacting. Give as much detail as possible about the time span for each sub-process and point out what could be improved.

Additionally asking the 6-w questions helps ensuring that all facets are considered.

Question description

▼ Details

This question aims on identifying possible solutions based on the improvement potential.

Describe an explicit process with humans interacting. Give as much detail as possible about the time span for each sub-process and point out why it is an improvement.

Fill in the answer on-line

The following slides show you how to fill the questionnaire on-line.

Register at questionnaire website

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First, you have to register at <https://questionnaire.erp5.net/MOOC.Subscription>, fill up your First and Last Name, eg. "Jingjing Xu", Password, etc.

Then you will receive an email to activate your account. Next step is to log in the questionnaire site with your Name and Password, as shown in next page.

Log in

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Log in the questionnaire site <https://questionnaire.erp5.net/> with your **Login Name and Password** .

Click on "Questionnaires"

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Now you are entering the ERP5 on-line questionnaire site. **Click on "Questionnaires"** .

Select a questionnaire

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If you are a **Student participating in an OSOE class** , select "ERP Configuration Lecture". If you an **ERP5 Starter client** , select "ERP5 Starter Questionnaire".

Action: Fill Out

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Now you are in the View page of the selected questionnaire. **Open the Action item list and click on "Fill Out"** to start answering the questionnaire.

"New Answer Set created"

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In this introduction page you will see a message confirming that your Answer Set has been created successfully. After reading the introduction of "ERP Configuration Lecture", **click on "Continue"** to start filling the questionnaire.

Fill the answers and click on "Answer Question"

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Fill or choose an answer to the provided fields and click on "Answer Question" to jump to the next question.

Note: Except for the answers of options, it is important to always provide the answers in full sentences, avoiding bullet lists. Please using clear and simple language helps condensing information on explicit and meaningful sentences. Also, it is important to make the answer is more explicit. Please ask the 5-w questions (Who? What? Where? When? Why? How?) before answering the question, which will help analyse the relevant facets of the described process.

The final question about the category spreadsheet

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After the question about project cost, you will be led to the final question "Please fill in and upload the category spreadsheet." Follow the steps showing in the screenshot, first download "P-OSOE-Configuration.Template", then fill in the spreadsheet as shown in "P-OSOE-Configuration.Sample", finally "Choose File" and click on "Answer Question" to upload your filled spreadsheet.

Continue to fill up after an interruption

The following slides show you how to continue to fill up after an interruption.

Use "Answer Sets" module to continue after interruption

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If you have to suspend the answering process, or if there is a disconnection of the internet which interrupts you to continue filling the questionnaire, don't worry, you can always **come back to your Answer Set by using the "Answer Sets" option in the Module list**.

Search for your Answer Set

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Now you are located in the "Answer Sets" module, which collects all the Answer Sets filled up by the interviewers. To search for your Answer Set, firstly, **click on the icon "Show All"** as circled in red in the screenshot, to make all the Answer Sets shown in the "Answer Sets list". Secondly **type your name in the "Person" field**, as the example circled in blue in the screenshot, and press "Enter" button in the keyboard.

Click on your Answer Set line

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Now you can see all the Answer Sets you created, if you have filled up more than one questionnaires. You can now **access to the one that you want to continue to fill up by clicking on its line**.

Click on "Fill Out" to continue answering questions

▼ Details

You are now back to your Answer Set, located in its View page. You can see a "Answers list" showing you all the questions you have answered before the interruption. **Open "Action" item list and click on "Fill Out"** to continue the answering process. You will be led to the question after the answered ones directly.

Submit your Answer Set

The following slides show you how to submit your finished Answer Set.

Click on the answer's line to update or change

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You can update or change your answers during the process of answering questions, even after you finished the last question by uploading the spreadsheet, just **click on the answer's line in the "Answers list" in the Answer Set's View page**.

Change Title and submit your answer set

▼ Details

You will find out that after uploading the spreadsheet, you are led to this page shown in the screenshot, telling you "Answer Set filled out." But you can still go back to modify your answers and re-upload your spreadsheet by clicking on "Answer Sets" module.

Finally, when you are sure every question is answered and the spreadsheet is uploaded, please **first change the Title** of your Answer Set using the organisation's name, **Save the change**, and open the Action item list to **click on "Submit"**, so that your Answer Set will be submitted for review.

Answer Set "Submitted"

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Once you submit the questionnaire, the state will change from "Draft" to "Submitted", then **you cannot change it until it is corrected and "Requested" by the "Reviewer" to improve** .

For Students: Grading of the Answers

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For students participating in an OSOE class, the questionnaire answers are graded by the tutor in the online correction field.

Each answer that has to be corrected by the tutor is penalized. However, for both the questionnaire and category configuration filling, you get the possibility to improve the answers and configuration based on the corrections made by the tutor. In the end, although you get two marks (one after the first submission and the other one after your correction of the results), only the second mark is relevant for your final grading. As a result, it is possible to reach the maximum number of points if the correction of the configuration is done properly.

For ERP5 Starter Clients: Questionnaire Review

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Nexedi will review your answers to the questionnaire and might ask for clarifications.

Since the questionnaire is the basis for the ERP5 Starter project, it is important that the answers provide precise information. Therefore, Nexedi will review your Answer Set and write comments-corrections for each answer which should be improved. Then the creation of the category configuration and the ERP5 Starter training plan will begin, when there are no more requests for improvement.

Improve your Answer Set requested to improve

The following slides show you how to improve your Answer Set requested to improve.

Find your Answer Set to improve

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After submitting your Answer Set, the next step is to wait for the correction of the reviewer. But how can you know your Answer Set was reviewed and requested to improve?

First, open the "My Favourites" menu in the ERP5 on-line questionnaire site home page. **When you see there appears an option "Answer Set to Improve", click on it** and you will find your Answer Set which was reviewed and requested by the reviewer to improve as shown in the next screenshot.

Open "Requested" Answer Set

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In this Answer Sets list, it shows all the Answer Sets reviewed and requested to improve. You can find out that the state has changed from "Submitted" to "Requested". Please click on the line on your Answer Set with the state "Requested" and you can start to correct your Answer Set according to the corrections from the reviewer.

Click on the answer's line to improve

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Now you are located in your Answer Set reviewed by the reviewer. You can see there are some answers with corrections (sometimes corrections with comments) listed in the Answers list. These are answers requested to improve by the reviewer. For the other answers without corrections, they are good answers already, so no need to modify any more.

To improve your answers, as shown in the previous slide, click on the answer's line and correct them one by one according to the corrections.

Improve your answers according to the corrections

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To improve your answer, please **modify directly in the field of the old answer**, following the corrections of the reviewer in the Correction Lines, then **Save** your changes.

Submit again your improved Answer Set

▼ Details

When you have finished the improvement, you can submit again your Answer Set for review.

Note: After the first improvement, you still have to check if the Answer Set is reviewed and requested to improve a second time or more.