

Site

Path	ID	Sort Index	Reference	Codification

In this sheet, define the physical sites of the organisation children sites. The level of detail may be different from site may be known only by its city or region name. A hierarchy, from the regional name to the identifier of a factory.

If reporting is needed on groups of sites, then it can be reporting requirements.

It is preferable to use region than cities. This will eliminate from one city to another.

Security codes must be defined for a selection of sites, example useless to define different securities based on be useful to differentiate security permissions for each of warehouse A may be prevented from entering invent

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on. Sites are structured as a tree of sites with
one site to another. For example, a small retail
factory may on the contrary describe 6 levels of
storage cell in one of multiple warehouses of the

useful to group sites per regions based on the

nate the need for changes in case an office moves

at an appropriate grain level. It would be for
the storage cell of a warehouse. However, it can
warehouse of the same factory. A warehouse clerk
ories for warehouse B.

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Group

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In this sheet, define the juridical structure of your organization. This juridical structure will be used of analytical accounts if it is enough.

Also define in this sheet your own vision on the structure of your business (suppliers, partners) with your own view on how they access your business with a group of companies named “*partner_group*” (infoservice and ffcleaning), especially if only infoservice is allowed to access your own ERP5 system within a specific context and access to some documents.

Just as for site, security codes must be defined at reasonable intervals for entities with different security. It is useless to define different security policies.

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organisation with its subsidiaries and business units.
counting. If the organisation is simple, a single group

ure of third party business entities (clients,
are structured. For example, if you have some
group”, you may want to differentiate its 2 entities
vice employee are your partners and if they are
cific partnership contract which grants them

onable granularity level. It is useful to differentiate
ifferent codes for entities which share the same

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Function

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In this sheet, describe the functional structure of your business with.

Organisation functions are implemented by nodes (ex. function tree). Person functions are implemented by leaf nodes.

Please make sure you understand the difference between a person whose grade is *director of research* may be assigned a function in an army (ex. general, commander) and of functions as implemented by nodes.

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organisation and of organisations you are in

factory, warehouse, factory/warehouse) of the
ives (ex. factory/manager, lab/director).

en grade and function. For example, a person
function of *factory manager*. Think of grades as in
assigned missions (ex. researcher, spy).

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Role

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Person and Organisations is the central directory of people and organisations treated equally because some organisations may actually be individuals (ex. our press agency is in the media, is our supplier and so on).

Please fill here the different roles of organisations you know.

You may consider different roles for clients: direct clients, partners, etc. They may have a notion of membership. Medias have subscribers.

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people and entities. All Person and Organisations are
ly have multiple roles: client, supplier and media
and bought from us some computers).

are doing business with.

ents, distributors, etc. Associations or communities
scribers.

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honorific point of view. Salary is also usually

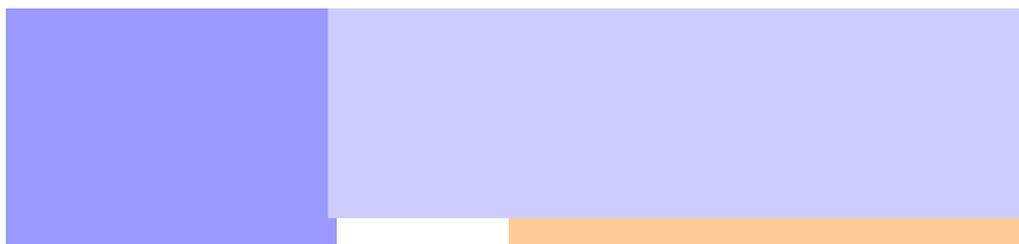
the army. Some army Generals are sometimes
de is still general but their function is Director of

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describes actual operational position while grade

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Region



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world according to your point of view.

over business concepts such as EMEA (Europe, Middle East, Africa) and APAC (Asia Pacific) and their consequences.

Barcelona to locate Barcelona in Catalunya, Espagne (French is the official language in France where few people consider writing to someone in France in Lyon, France).

independent, or of any region in which part of its inhabitants consider that they are dependent from what they view as an occupation force. There are many regions in the world which is a major industrial country and which is not considered as

independent, or of any region in which part of its inhabitants consider that they are dependent from what they view as an occupation force. There are many regions in the world which is a major industrial country and which is not considered as

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Region



Skill

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Please fill here the list of skills which you want to associate with this path.

Consider first people inside your organisation and their skills.

Consider then people outside your organisation and their skills.

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Associate to Person in order to qualify them.

or skills.

the skills they provide to your organisation.

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Nationality

Path	ID	Sort Index	Reference	Codification

Please fill here the list of nationalities in the world according to the UNO standards exist for this. However, they do not cover the case of a Chinese from mainland and a Chinese from HK is not considered in Western Europe.

A person from Taiwan is considered as Taiwanese by some countries if his passport mentions *republic of china*. Addressing to a Taiwanese person sometimes create a lot of frustration.

Another interesting case is the case of group of countries where a passport with a dual mention: the group of countries and the country of origin.

We advice you to define your own view on nationalities.

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ording to your point of view.

ver all nationalities. For example, the nationality
s treated quite differently by immigration services

some people and as Chinese by others. His or her
Taiwan inhabitant as he or she was Chinese can

es (EU, CEDEAO, etc.) which inhabitants carry a
nd the country itself.

es so that it serves best your business needs.

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Activity

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Activities describe your view on all possible economic standards for activities. However, it is better to define requirements

Activities are different from function. Activities usually the nature of their industry (ex. banking, IT, automotive (ie. both an IT and an automotive company can have e

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e activities in the world. There are UNO, European
your own classification based on specific business

y relate to a classification of third parties based on
e) whereas function is independent of the activity
ntity which has the function of a warehouse).

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Publication Section

Path	ID	Sort Index	Reference	Codification

Please fill here the list document types in your compar

A document type is for example: a contract, a status re
which are involved in your daily business can be store
in relation with a business document (ex. a specificatio

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ny.

port, a letter, etc. The different document types
d in the ERP, either autonomously (ex. Letter) or
on document can be used to support a Sale Order).

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Product Line

Path	ID	Sort Index	Reference	Codification

Please fill here the list of product lines sold or purchase

Product lines are used for both purchase and sales. They (or purchased) and to structure a large database of produ

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ed by your company.

y are useful to create a catalog of products (sold
acts and services by families.

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