Path	ID	Sort Index	Reference	Codification

In this sheet, define the physical sites of the organisati... children sites. The level of detail may be different fro... 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 elim... 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 inven...

Title	Short Title	Description

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

useful to group sites per regions based on the

inate 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
tories for warehouse B.

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Path	ID	Sort Index	Reference	Codification

In this sheet, define the juridical structure of your orga
This juridical structure will be used of analytical accou
is enough.

Also define in this sheet your own vision on the structu
suppliers, partners) with your own view on how they a
business with a group of companies named "*partner_g*
(infoservice and ffcleaning), especially if only infoserv
allowed to access your own ERP5 system within a spe
access to some documents.

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

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Title	Short Title	Description

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

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

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

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Path	ID	Sort Index	Reference	Codification

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 lea

Please make sure you understand the difference betwe whose grade is *director of research* may be assigned a an army (ex. general, commander) and of functions as

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Title	Short Title	Description

organisation and of organisations you are in

factory, warehouse, factory/warehouse) of the
ves (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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Path	ID	Sort Index	Reference	Codification

Person and Organisations is the central directory of pe

treated equaly because some organisations may actuall

(ex. our press agency is in the media, is our supplier ar

Please fill here the different roles of organisations you

You may consider different roles for clients: direct clie

may have a notion of membership. Medias have subsc

Title	Short Title	Description

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

are doing business with.

nts, distributors, etc. Associations or communities
ribers.

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Path	ID	Sort Index	Reference	Codification

Grade describes the position in an organisation from a
based on grade, rather than on function.

Typical example of grade are *General, Commander* in
assigned to research management functions. Their grac
R&D Center.

There is no direct relation between grade and function.

Grades differ from function in the sense that function o
describes a honorific position.

Title	Short Title		Description

honorific point of view. Salary is also usually

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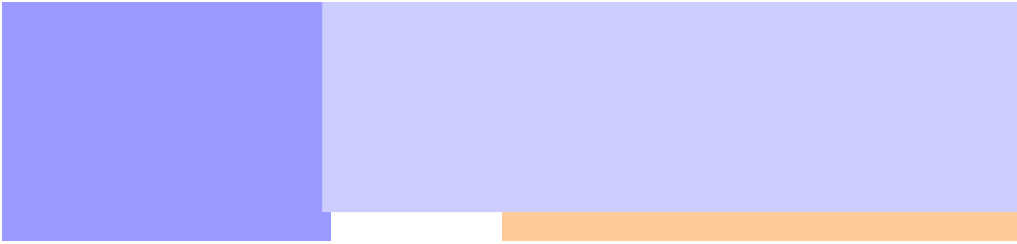le is still general but their function is Director of

.

describes actual operational position while grade

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Region

Path	ID	Sort Index	Reference	Codification

Please fill here the list of regions and counties in the w

UNO standards exist for this. However, they do not co
Asia). Moreover, the choice of a list of regions include

For example, it is usual when sending a letter to Barce
standard for international mail). This would not be the
Lyon, Rhone-Alpes, France but would write to someor

Consider also the case of Corsica which is more sensit
they belong to a country which aims at becoming inde
numerous examples of this kind, including Taiwan wh
such by UNO.

Another example is Japan, which most inhabitants con
Doing business in Asia often requires a special treatme
whereas China influenced countries are put in a single

We advice you making your own classification of regic
changes (will Taiwan be part of China in 10 years ? wi
may evolve, but business remains.

Regions need also sometimes a higher level of precisic
states in the USA. However, a USA business needs to
should therefore appear in the region category for a US
probably needs prefectures (ex. Kanagawa) yet does n
which does not make much sense usually in Japanese
the level of the different areas in the same city.

Region

Title	Short Title	Description

world according to your point of view.

ver business concepts such as EMEA (Europe, Midldle East,
s both commercial and political consequences.

lona to locate Barcelona in Catalunya, Espagne (French is the
case in France where few people consider writing to someone in
e in Lyon, France.

ive, or of any region in which part of its inhabitants consider that
pendent from what they view as an occupation force. There
ich is a major industrial country and which is not considered as

sider that they are not part of Asia (China is part of Asia for them).
ent for Japan, which is considered as a continent on its own,
group.

ons in the world and making it as independent as possible of future
ll New Caledonia become independent in 5 years ?). Geopolitics

on, but not uniformly. A European business does not care about
keep track of its clients based on the state information. USA states
SA business. The same is true for a Japanese business, which
ot use very often the political concept of "region" (ex. Chubu)
business culture. And a local business may require a precision at

Region

Skill

Path	ID	Sort Index	Reference	Codification

Please fill here the list of skills which you want to asso

Consider first people inside your organisation and thei

Consider then people outside your organisation and the

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ociate to Person in order to qualify them.

r skills.

e skills they provide to your organisation.

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Path	ID	Sort Index	Reference	Codification

Please fill here the list of nationalities in the world acc

UNO standards exist for this. However, they do not co
of a Chinese from mainland and a Chinese from HK is
in Western Europe.

A person from Taiwan is considered as Taiwanese by s
passport mentions *republic of china*. Addressing to a T
sometimes create a lot of frustration.

Another interesting case is the case of group of countie
passport with a dual mention: the group of countries a

We advice you to define your own view on nationalitie

Title	Short Title	Description

ording to your point of view.

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

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

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

s so that it serves best your business needs.

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Path	ID	Sort Index	Reference	Codification

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

Activities are different from function. Activities usuall
the nature of their industry (ex. banking, IT, automotiv
(ie. both an IT and an automative company can have er

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

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

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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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Title	Short Title	Description

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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Path	ID	Sort Index	Reference	Codification

Please fill here the list of product lines sold or purchas

Product lines are used for both purchase and sales. The
or purchased) and to structure a large database of prod

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Title	Short Title	Description

ed by your company.

ey are useful to create a catalog of products (sold
ucts and services by families.

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