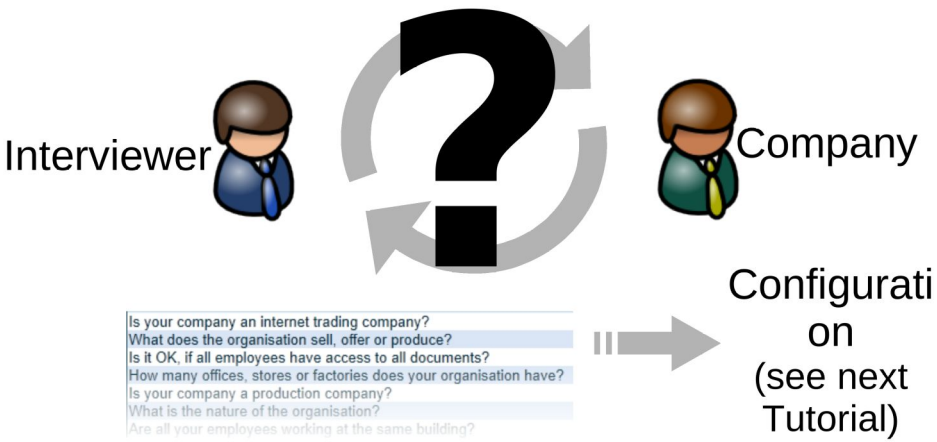
ERP5 Configuration Questionnaire

This guide will teach you:

- What the questionnaire is needed for.
- How to provide high quality answers.
- How to fill in answers on-line.



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Why should you read?

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Questionnaire Objectives

1. Analyzing what the company's strong point is.
 → For finding out what is not to be changed.

2. Analyzing what the company's weak point is.
 → For finding out what ERP5 could possibly improve.

3. Finding a possible solution proposal.

4. Getting informations about the facets of the company.
 → Sites, Roles, Functions, Products, Regions, …

5. Ensure a high quality in the answers.

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What is a good answer?

Always fill in the answer in full sentences using simple and clear language (no bullet lists!).

While answering the questions, it is most important to find explicit cases, rather than general statements.

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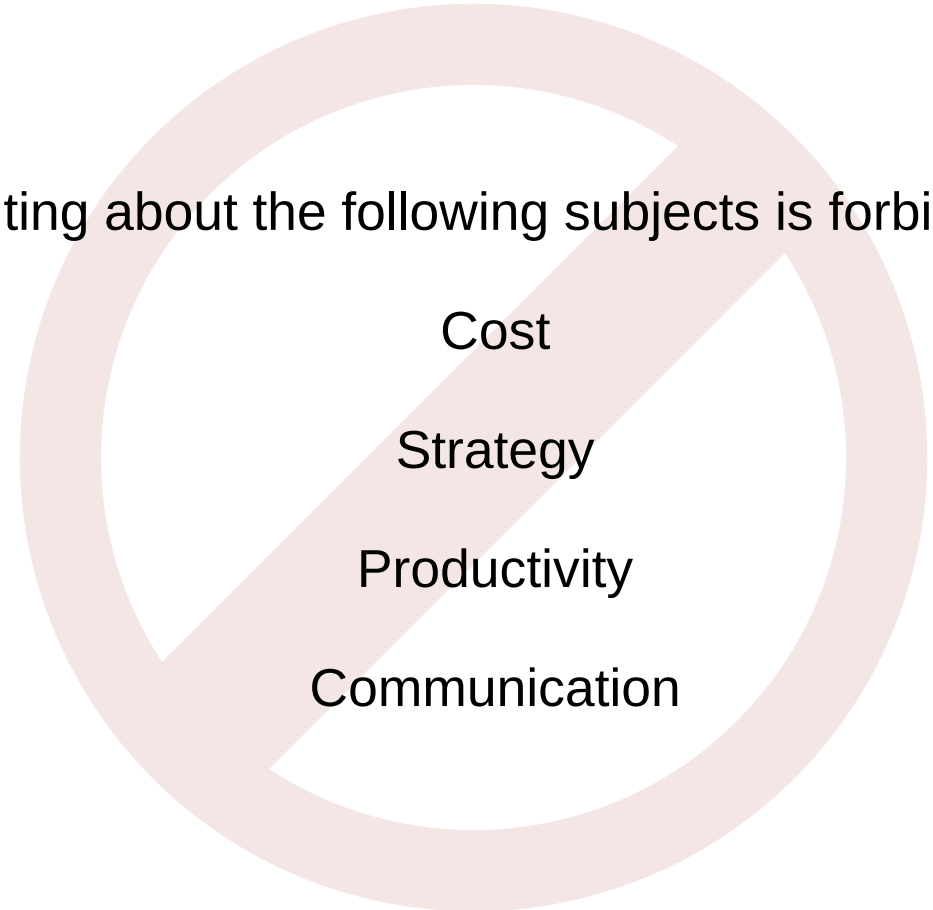
What is a bad answer?



Writing about the following subjects is forbidden:

Cost

Strategy

Productivity

Communication

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What is a good answer?

Our IT is too expensive and our CRM is inefficient.

This answer is too generic. It shows issues, but gives no explicit case to improve. A good answer could be:

This answer is better because it gives exact time information and shows a process ranging from the customer to the related system. It reveals which information is needed and where it is stored.

Our CRM is inefficient because it takes the sales representative 15 minutes to transfer the customer feedback (concerning our products and service) manually into word files in the file-system.

Try to think in processes, and make sure to keep the 5w-questions in mind and relate the answers to the process.
Who? What? Where? When? Why? How?

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Question descriptions

The next 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 then general statements.

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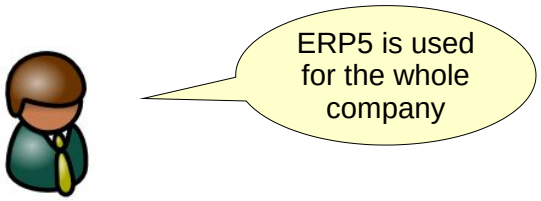
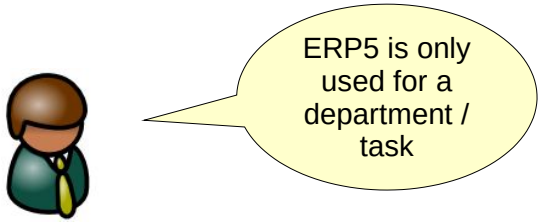
Question description

What does the organisation sell, offer or produce?



Describe in detail what your company does to make profit. This can be products, services or trading goods. Sub questions are:

What is sold?
Where is it sold?
To whom is it sold?



Describe in general the products of you company. Add details about the department you are planning to use ERP5 in. Sub questions are:

What is sold in the company?
What does the are of implementation sell?
Where is it sold?
To whom is it sold?

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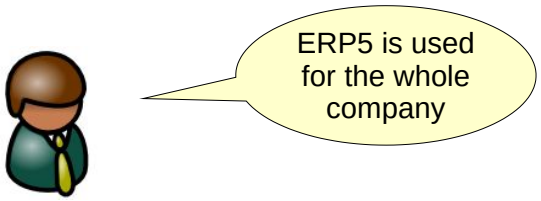
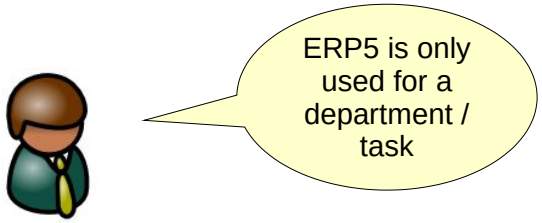
Question description

What does the organisation purchase, recycle, receives or uses?



Describe the input for your company in detail.

What is used / purchased / recycled / received or used?
Where?
Who is it bought from?



Describe the input for your target department / area. Sub questions are:

What is used / purchased / recycled / received or used?
Where?
Who is it bought from?
How is it connected to the company's system?

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Question description

Who are the contacts of the implementation field?

Describe the contacts the company has.
A contact is a person from another company who you address your communication to. This encompasses suppliers and customers.

Possible sub questions:
- Customer side?
- How are the contacts classified? (company size, geographical location,...)
- Supplier side?

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Question description

What are the typical skills and initial training of the staff?

Describe the skills in the application field.

Possible sub questions:

- Manufacturing skills?
- IT skills?
- Soft skills?
- Management skills?
- Unique skills necessary in your company?

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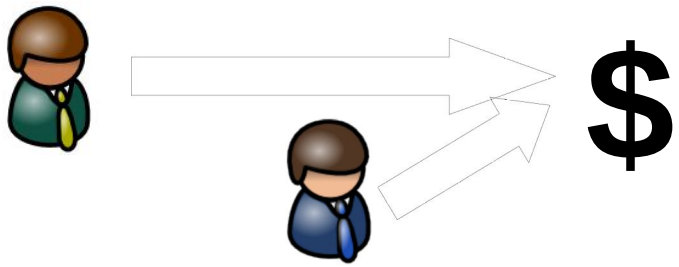
Question description

Please provide an example of management area or of business process which the organisation is handling in a way which it considers itself as being good or successful. Explain what reasons make his business process or business area successful.



Possible sub questions:

- Which persons are included in the process?
- What are they doing exactly?
- What is the result?
- Why is this a benefit for the company?

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Question description

Please provide an example of management area or of business process which the organisation is handling in a way which it considers itself as being poor or wrong, and which could be improved. Explain from what point of view the management area or business process is currently not well implemented.

Possible sub questions:

- Which persons are included in the process?
- What are they doing exactly?
- What is the result?
- What can be improved?
- Describe how the improvement would change the process.
- What is needed for the improvement by whom?

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Question description

Explain what the organisation expects from an ERP as 1st priority to improve its own management?

Possible sub questions:

- Which persons are included in the process?
- What are they doing exactly?
- What is the result?
- What benefit is this for the company?
- Describe how the improvement would change the overall process
- What is needed for the improvement by whom?

Ask the same for the 2nd and 3rd priority.

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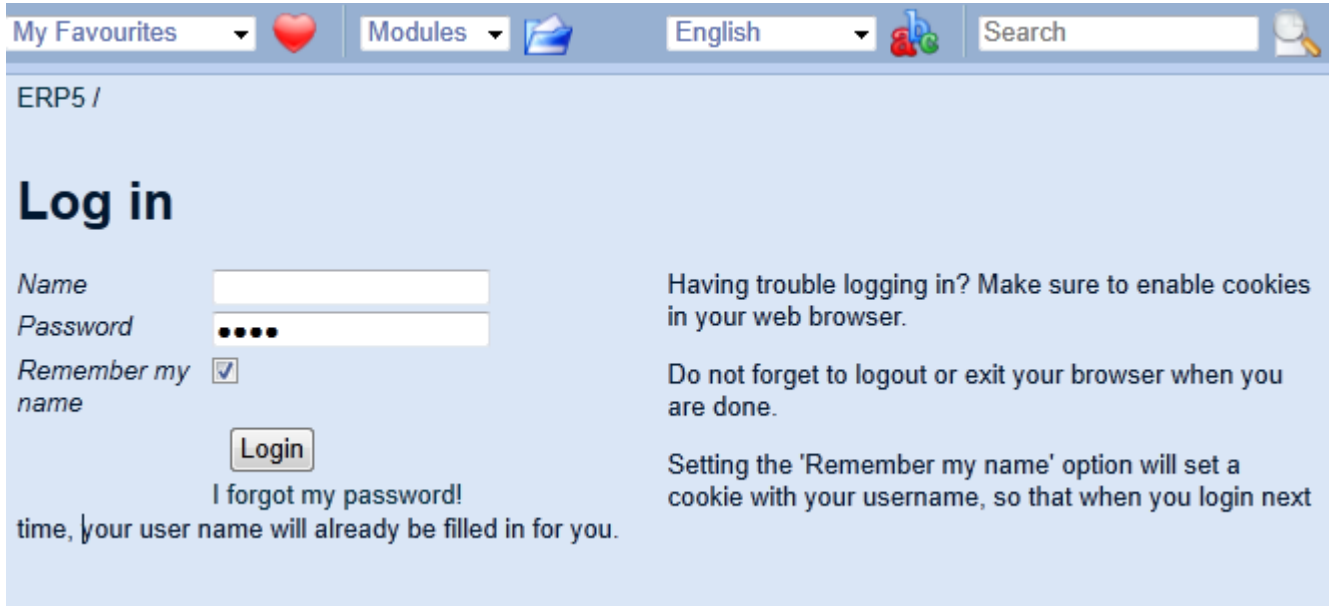
How to fill in the answer on-line

Go to: https://www.tiolive.com/questionnaire



Log in with your Name and Password.

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How to fill in the answer on-line

After the log in click on “Questionnaires”

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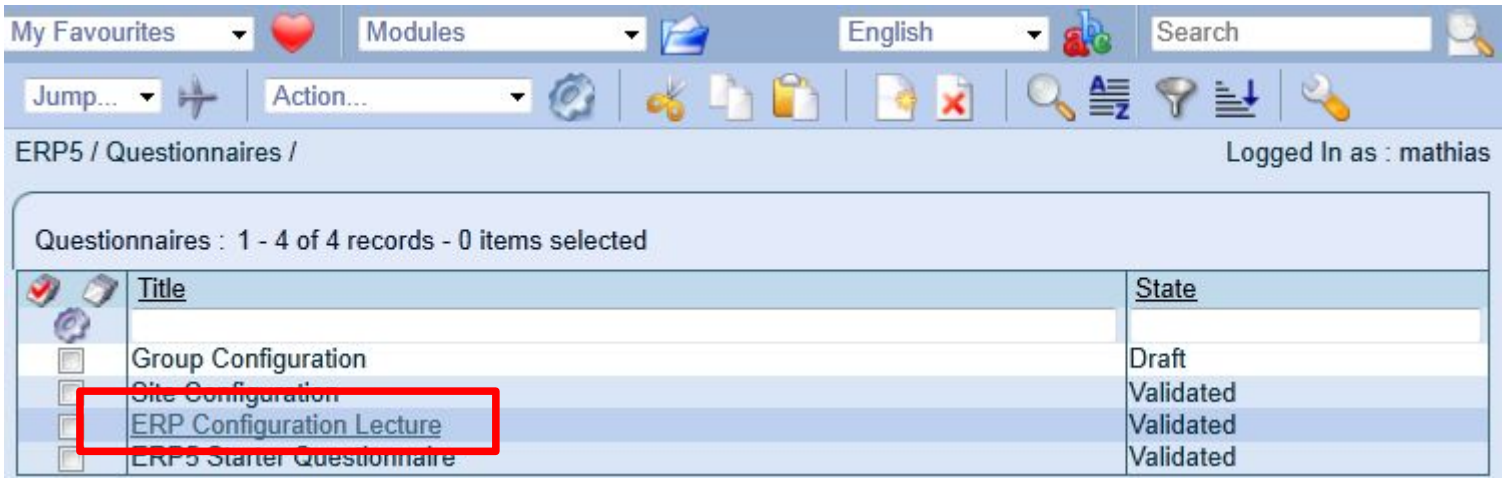
How to fill in the answer on-line

Select ERP Configuration Lecture



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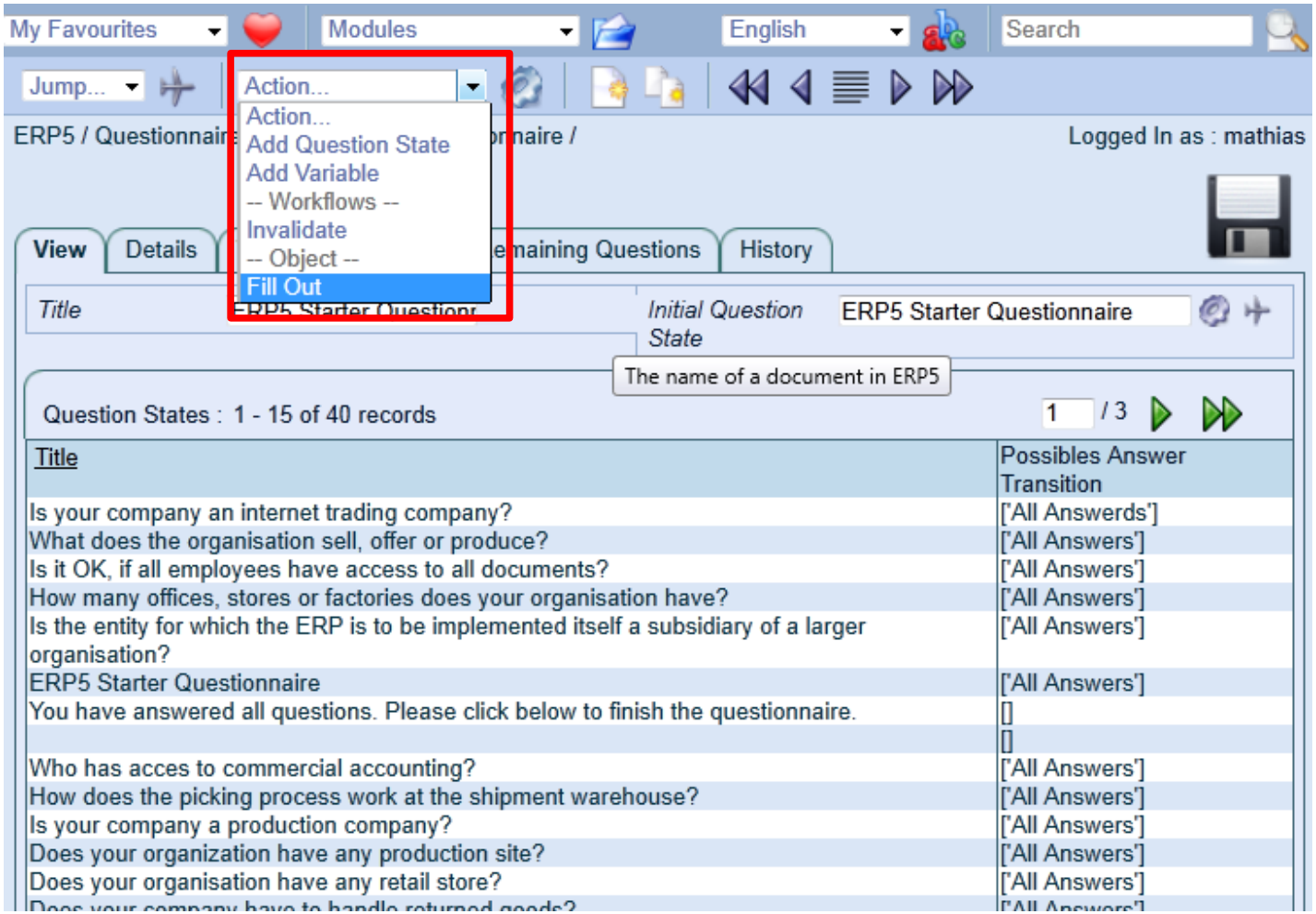
How to fill in the answer on-line

Click on Action.. → Fill Out to start answering the questionnaire



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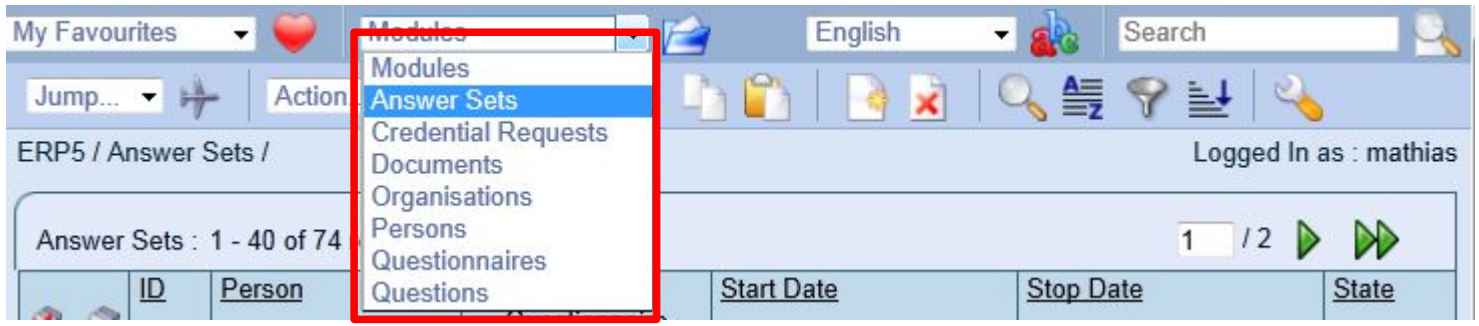
How to fill in the answer on-line

Fill the answers into the provided fields.

If you have to interrupt the filling of the fields or there is a disconnection of the internet, you can always come back to your answer set by selecting “Answer Sets” in the modules list:



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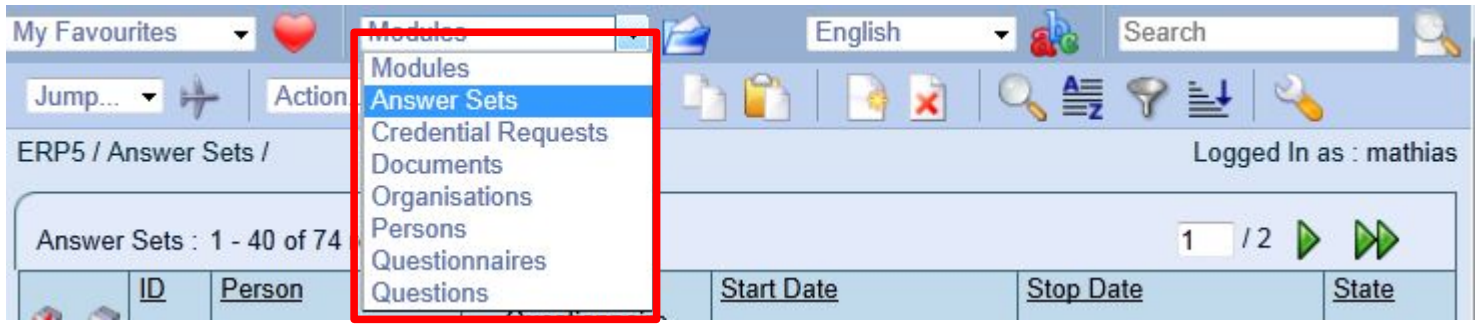

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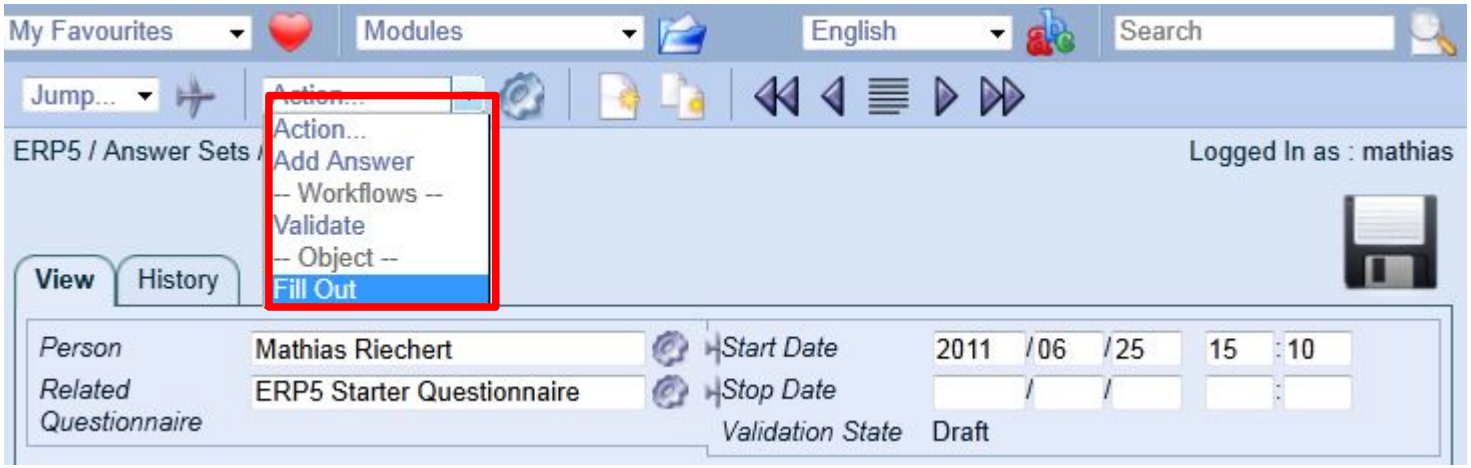
How to fill in the answer on-line

☐	87	Mathias Riechert	ERP5 Starter Questionnaire	2011/06/25 16:56:00 UTC	2011/06/25 17:04:00 UTC	Draft

Search for your ID and click on the title. You'll then see a List of all answered questions.
If the answer process was interrupted earlier you can continue the filling by clicking on Actions → Fill Out



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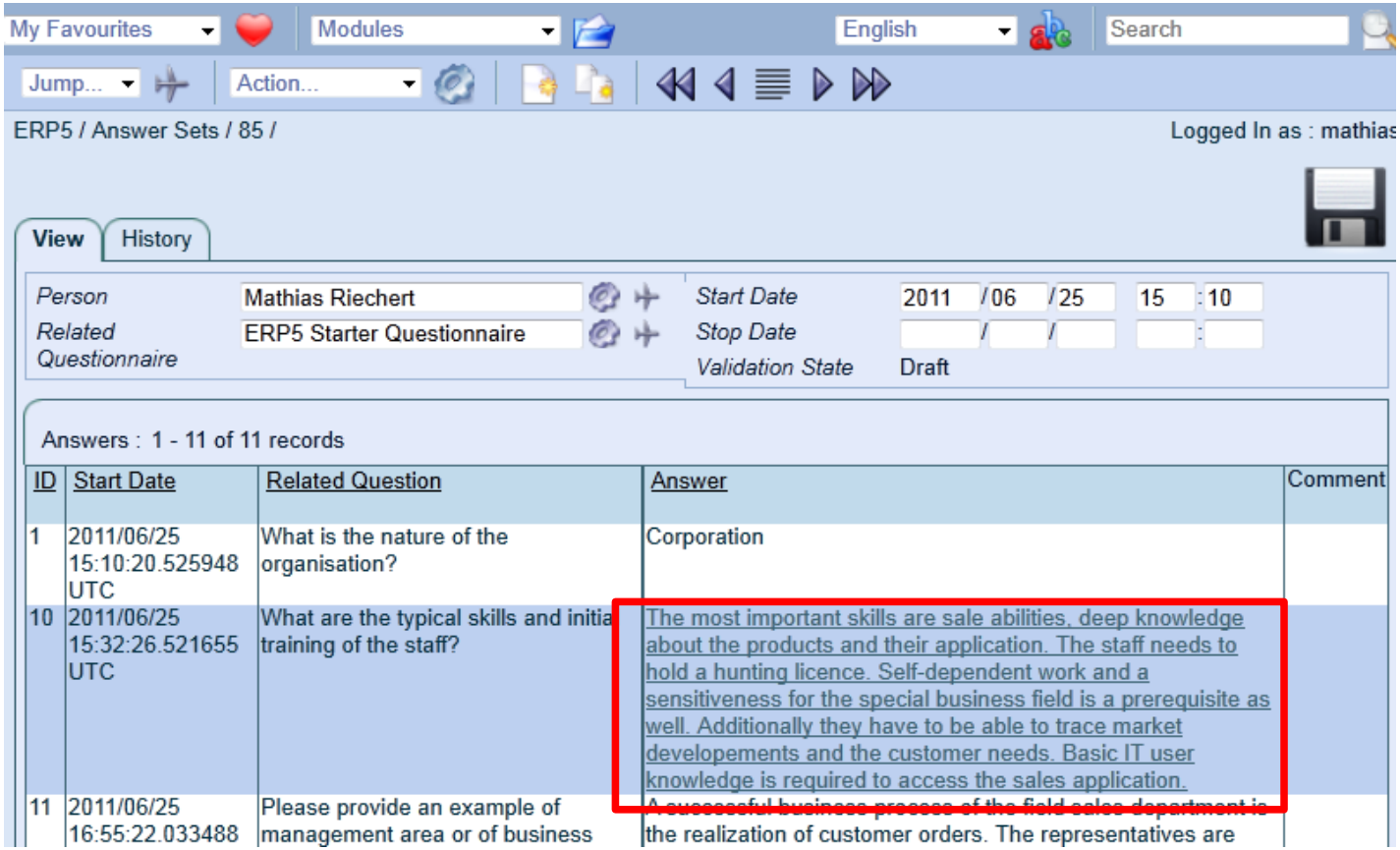
How to fill in the answer on-line



You can always change or update answers by clicking on an answer in the list.

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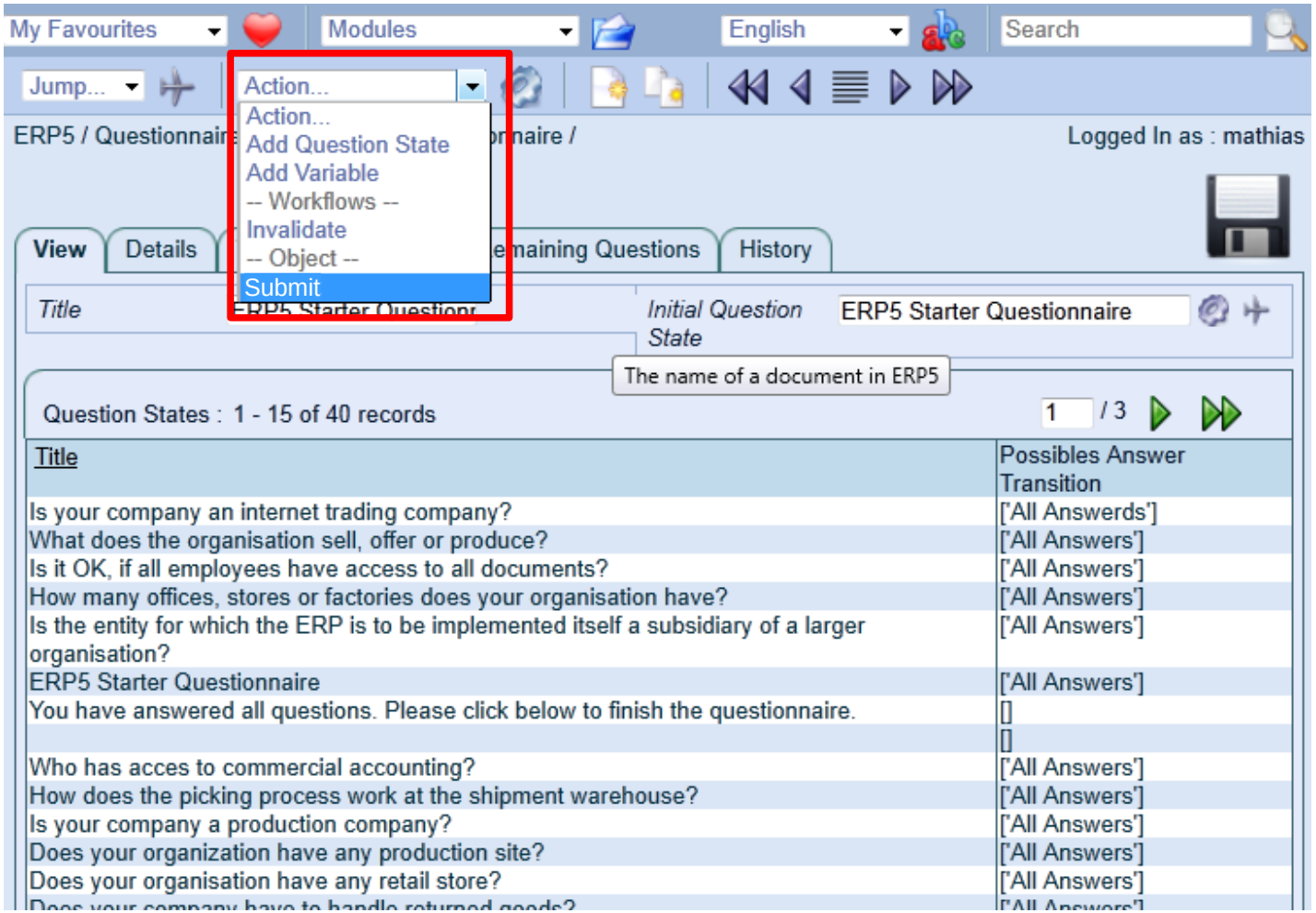
How to fill in the answer on-line

After you finish the questionnaire, please submit it for review.



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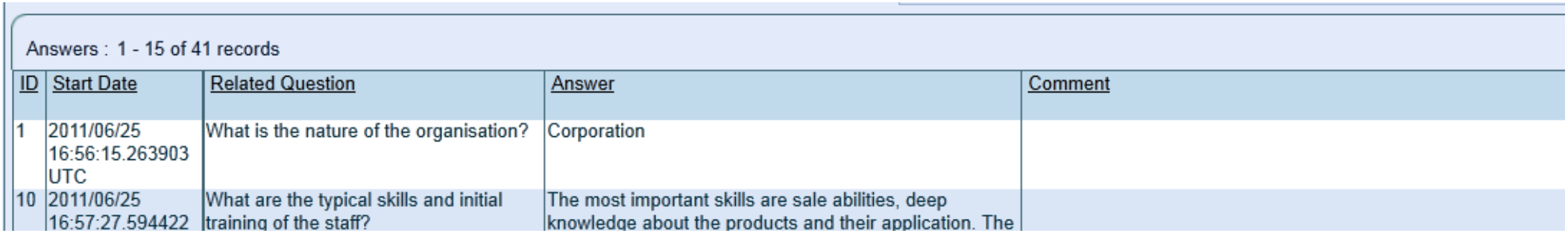
Grading of the Answers

The questionnaire answers are graded by the professor in the online correction field.



Answers : 1 - 15 of 41 records

ID	Start Date	Related Question	Answer	Comment
1	2011/06/25 16:56:15.263903 UTC	What is the nature of the organisation?	Corporation	
10	2011/06/25 16:57:27.594422	What are the typical skills and initial training of the staff?	The most important skills are sale abilities, deep knowledge about the products and their application. The	

Each answer that has been corrected by the professor is 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.

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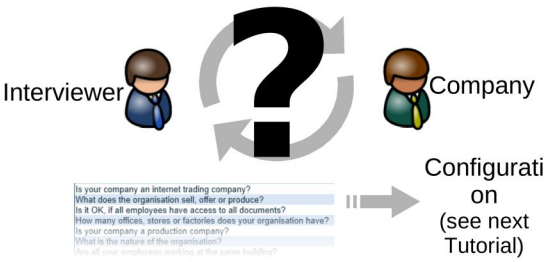

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This visual guide has been created for learning and for teaching ERP design. This visual guide can be used as reference to understand current ERP5 design and future directions. It is mostly useful to ERP5 developers who need to understand ERP5 roadmap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

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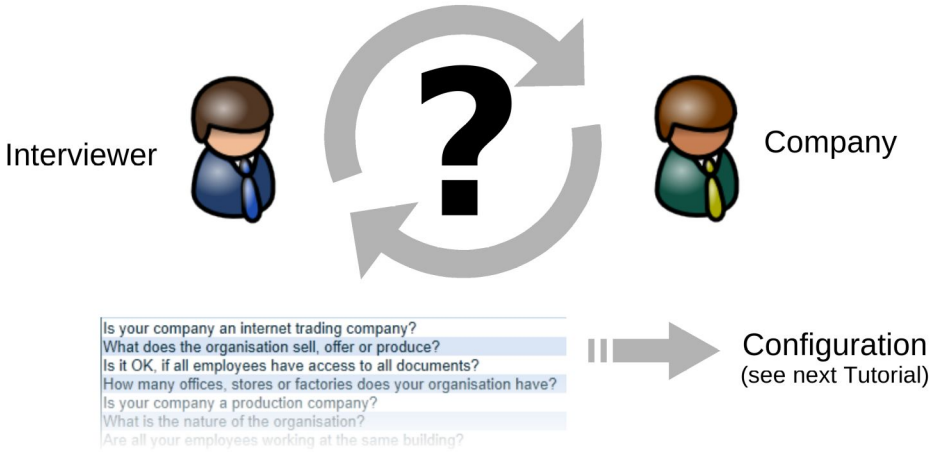
Why should you read?



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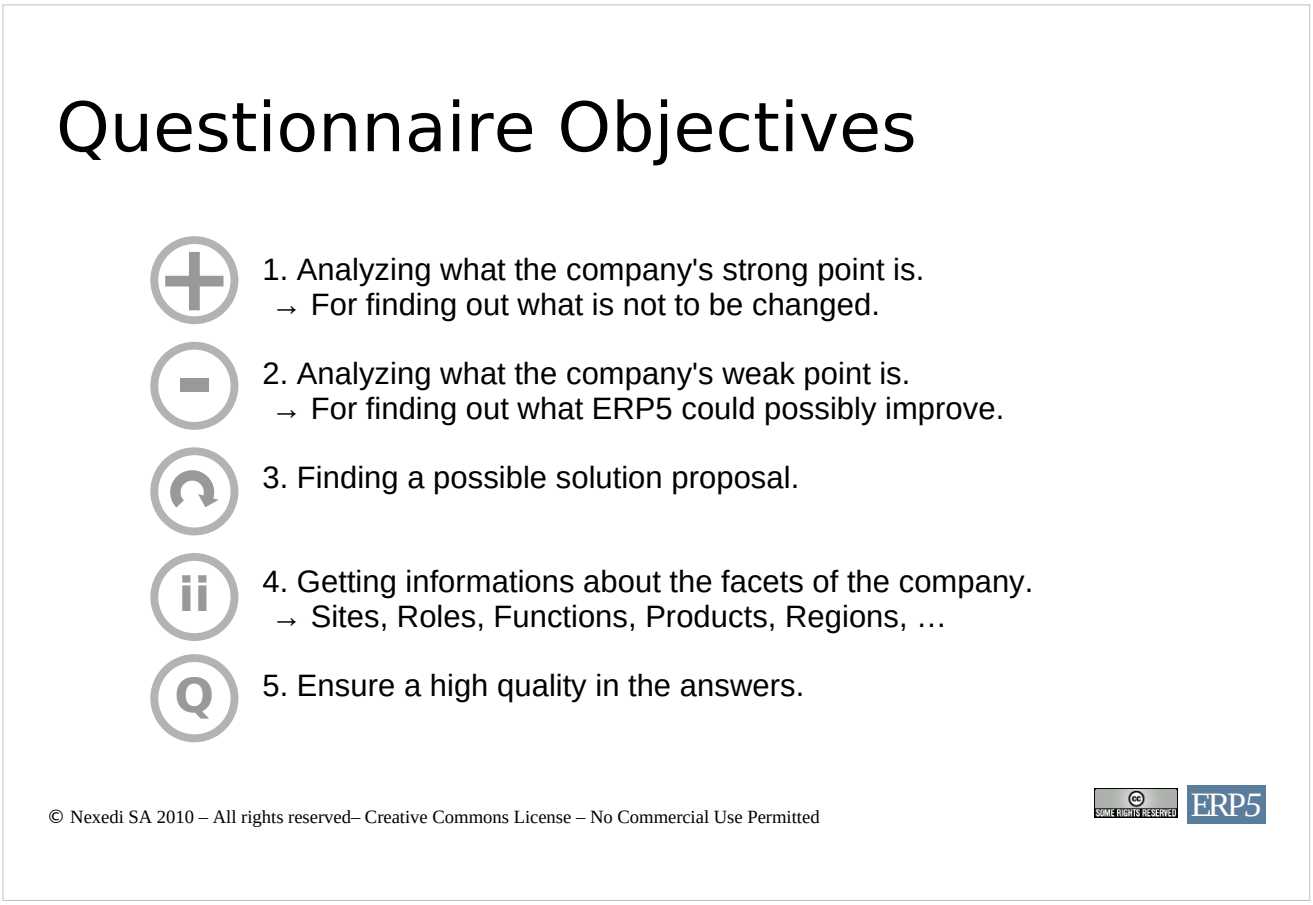
The interview is a bilateral process between the interviewer and the company. A questionnaire is used to extract information about the company in a way which allows for the ERP configuration to be filled. The results of the interview will be transferred on-line. This visual guide will show you how what constitutes a good answer, and discuss the questions detailed.



The objectives of the questionnaire are listed above.

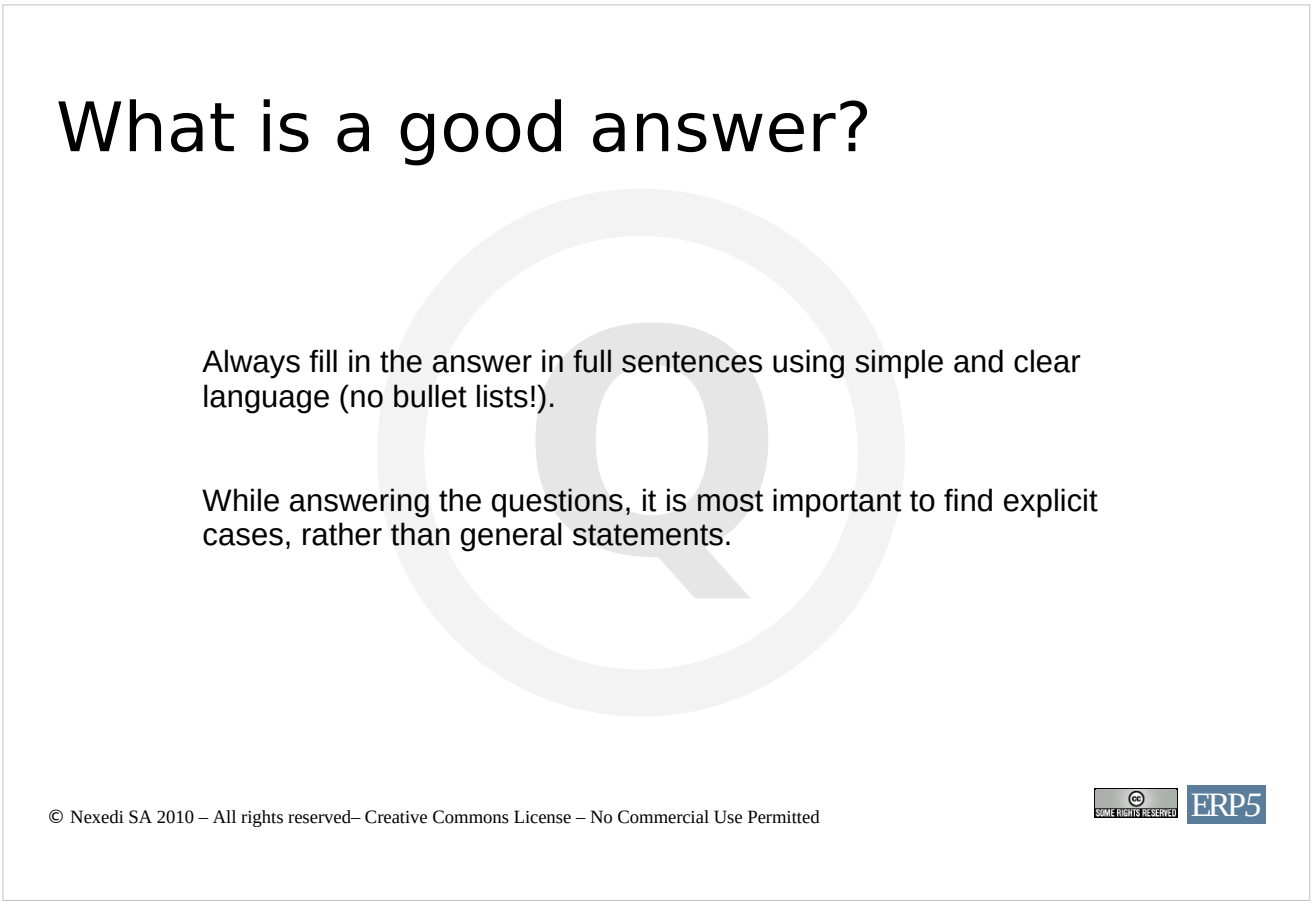
The starting point is to analyse what the company's strong point is. This is necessary to prevent changes in this field. Additionally, asking about positive processes first results in a more open communication culture in the interview.

Secondly, the weak point has to be analysed. This could be a process which is inefficient, redundant or oversized. It is most important to provide an explicit description of the process with all relevant key questions.

Thirdly, ERP5 is used to improve the weak point of the organization. The goal is finding and describing a possible future application area where ERP5 can be introduced.

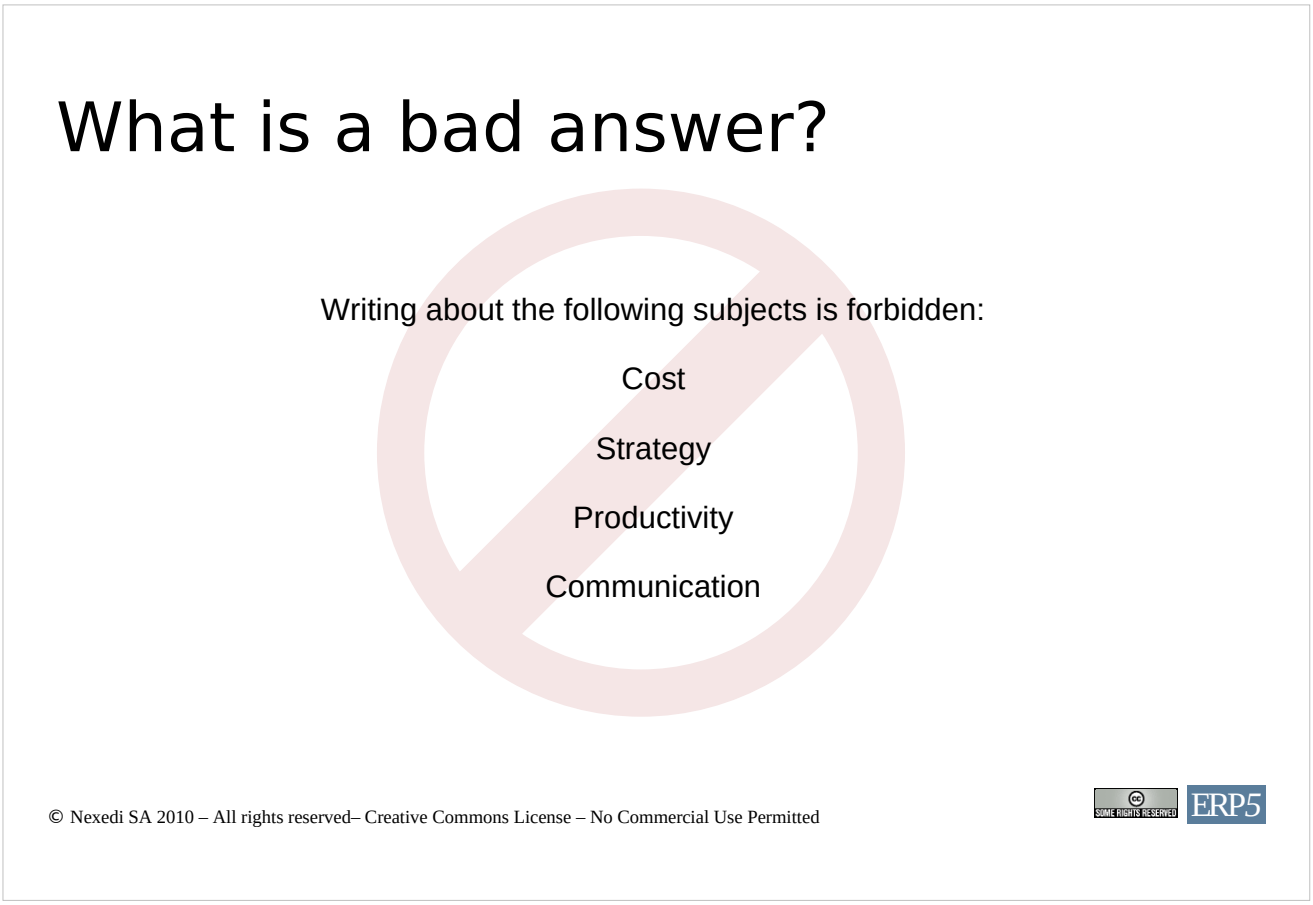
The next step is to provide the information about the facets of the company to enable the configuration sheets to be filled in.

Finally, all questions have to be checked for their answer quality, explicitness and completeness.



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 document 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. Make sure to get explicit processes and cases.



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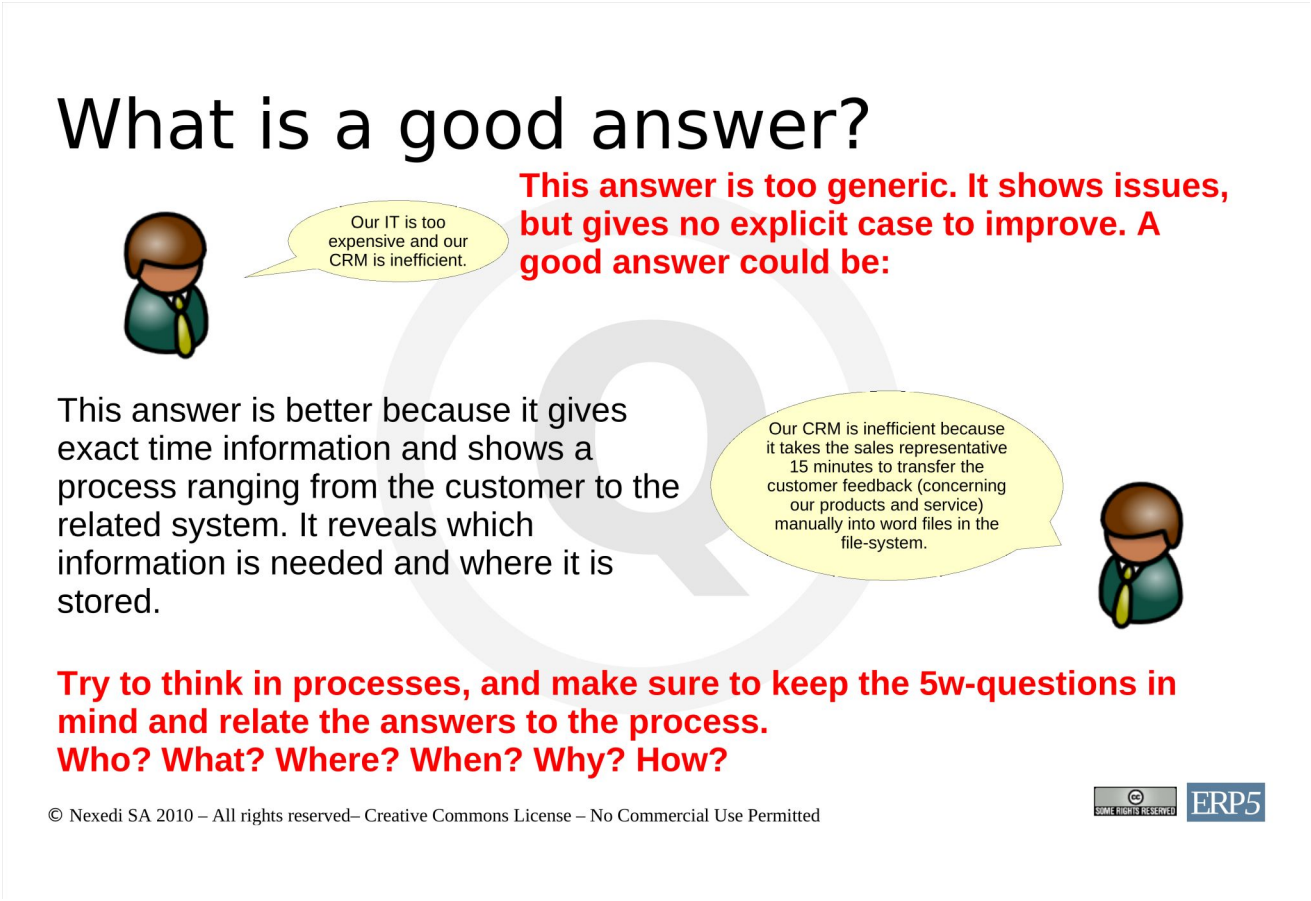
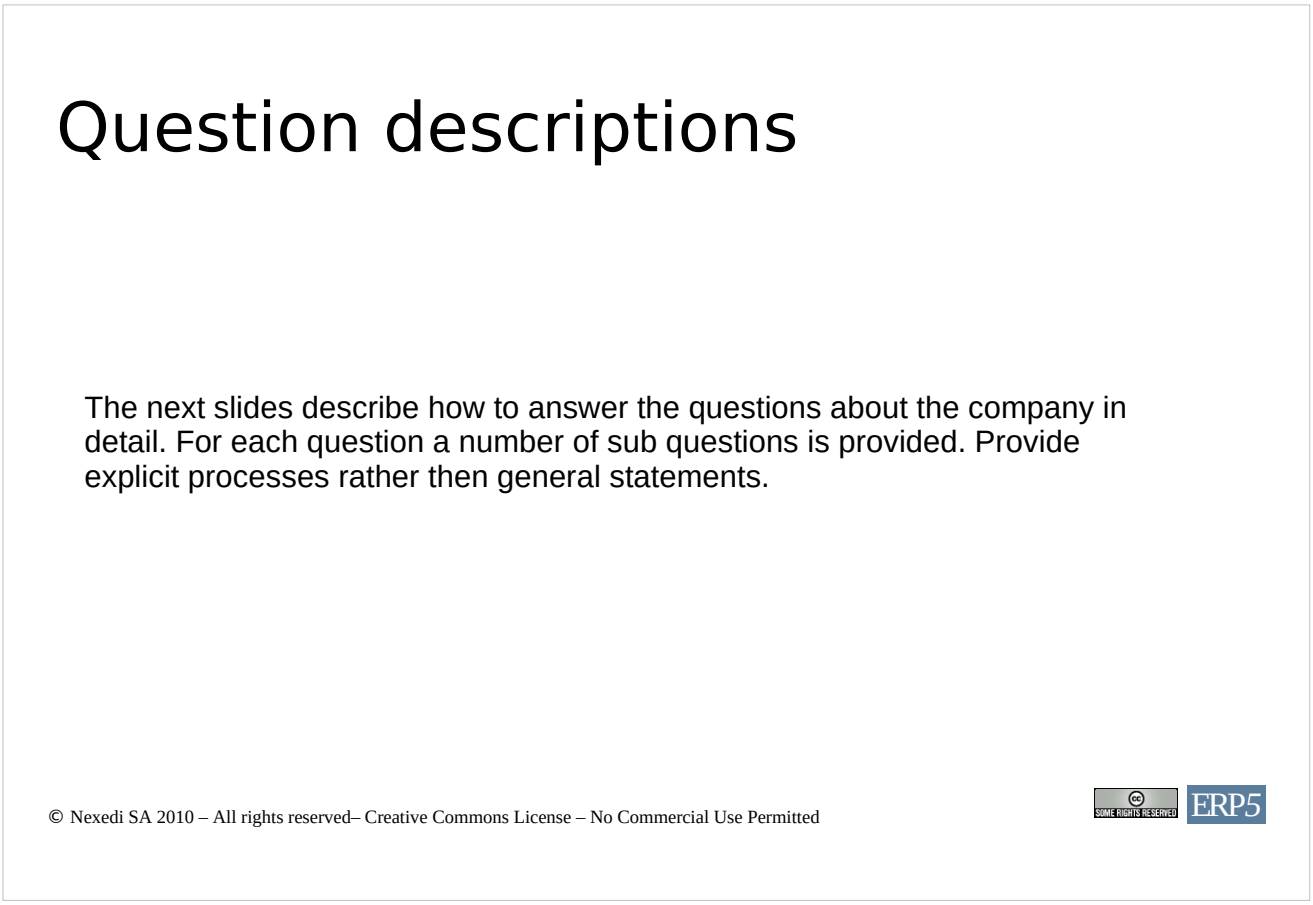


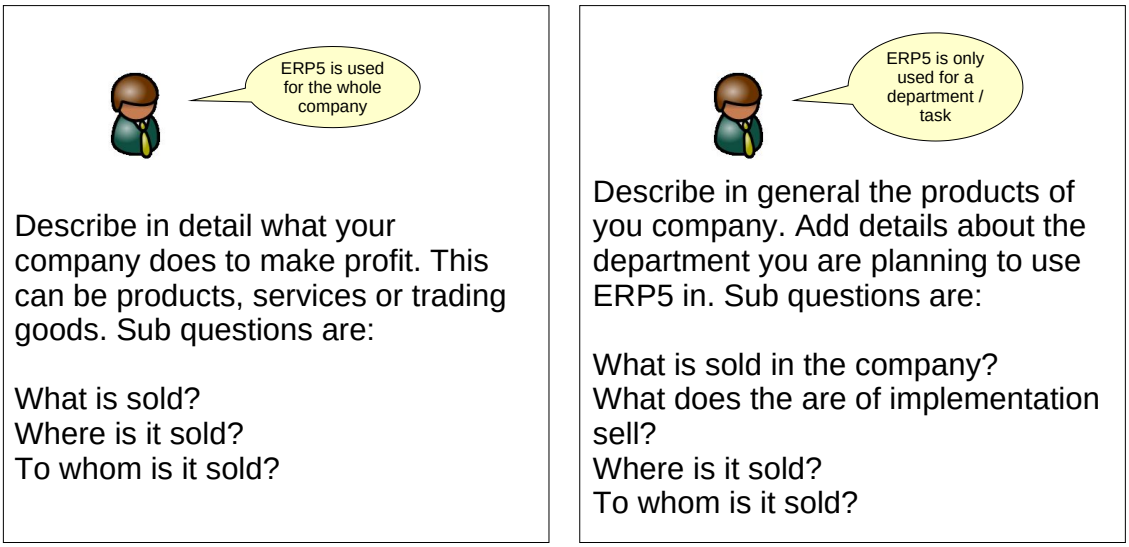
The first answer example shown is too generic. It shows issues (cost, inefficiency), but it gives no explicit case to improve. To make the answer more explicit, asking the 5-w questions (Who? What? Where? When? Why? How?) can analysing the relevant facets of the described process. Still the aim is to get a cohesive description of the process.



The next slides describe how to answer the questions about the company in detail. For each question a number of sub questions is provided.

Question description

What does the organisation sell, offer or produce?



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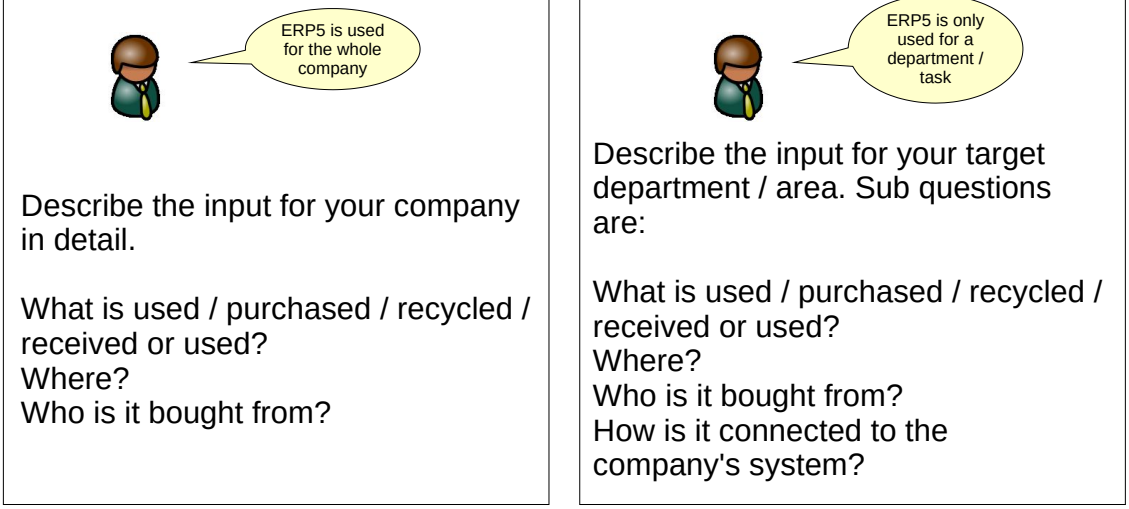
This question aims on identifying output of the company, encompassing products, services or trading goods. Give the highest possible detail on what is sold (with hierarchy), where it is sold and to whom it is sold.

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

What does the organisation purchase, recycle, receives or uses?



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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 part make sure to describe the inputs explicitly for both the whole company and the department ERP5 is used in.

Question description

Who are the contacts of the implementation field?

Describe the contacts the company has.
A contact is a person from another company who you address your communication to. This encompasses suppliers and customers.

Possible sub questions:
· Customer side?
· How are the contacts classified? (company size, geographical location,...)
· Supplier side?

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

What are the typical skills and initial training of the staff?

Describe the skills in the application field.

Possible sub questions:

· Manufacturing skills?
· IT skills?
· Soft skills?
· Management skills?
· Unique skills necessary in your company?

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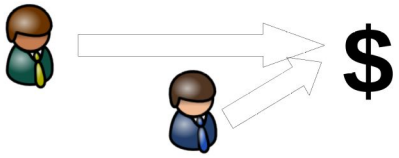
The aim of this question is to get information about the employees skills for the skill category. Ensure to take both skills inside and outside your company into consideration. It is possible to directly ask for the provided skill categories, but be aware that the company might have a individual skill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

Question description

Please provide an example of management area or of business process which the organisation is handling in a way which it considers itself as being good or successful. Explain what reasons make his business process or business area successful.



Possible sub questions:
· Which persons are included in the process?
· What are they doing exactly?
· What is the result?
· Why is this a benefit for the company?

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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.

Possible sub questions are:

- Which persons are included in the process?
- What are they exactly doing?
- What is the result?
- Why is this a benefit for the company

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

Question description

Please provide an example of management area or of business process which the organisation is handling in a way which it considers itself as being poor or wrong, and which could be improved. Explain from what point of view the management area or business process is currently not well implemented.

Possible sub questions:
· Which persons are included in the process?
· What are they doing exactly?
· What is the result?
· What can be improved?
· Describe how the improvement would change the process.
· What is needed for the improvement by whom?

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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.

Possible sub questions are:

- Which persons are included in the process?
- What are they exactly doing?
- What is the result?
- What can be improved?
- Describe how the improvement would change the process
- What is needed for the improvement by whom?

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

Question description

Explain what the organisation expects from an ERP as 1st priority to improve its own management?

Possible sub questions:
· Which persons are included in the process?
· What are they doing exactly?
· What is the result?
· What benefit is this for the company?
· Describe how the improvement would change the overall process
· What is needed for the improvement by whom?

Ask the same for the 2nd and 3rd priority.

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

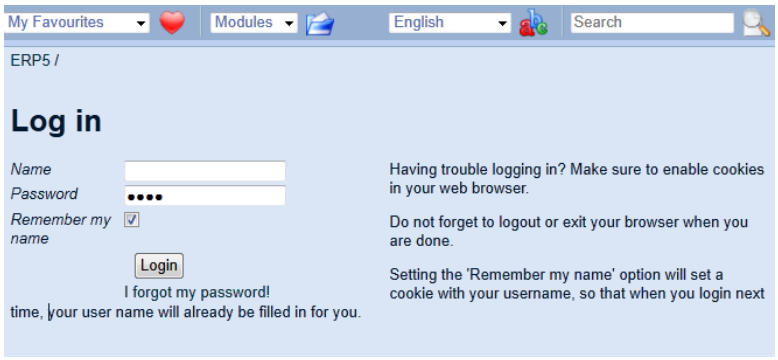
Describe an explicit process with humans interacting. Give as much detail as possible about the time span for each sub-process and point out why it is an improvement.

Possible sub questions:

- Which persons are included in the process?
- What are they exactly doing?
- What is the result?
- What benefit is this for the company?
- Describe how the improvement would change the overall process
- What is needed for the improvement by whom?

How to fill in the answer on-line

Go to: https://www.tiolive.com/questionnaire



Log in with your Name and Password.

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Log in with your Name and Password.

How to fill in the answer on-line

After the log in click on “Questionnaires”

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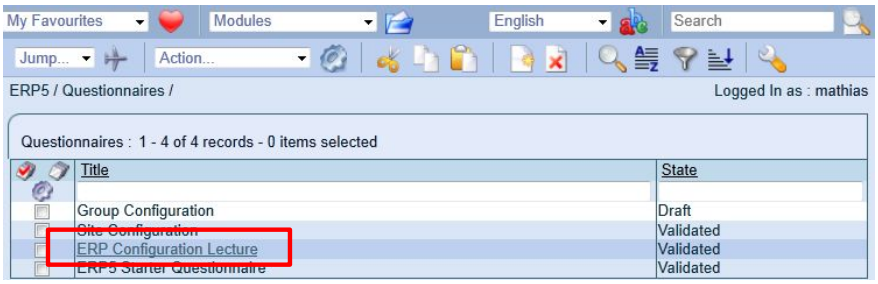
After the log-in click on “Questionnaires”.

How to fill in the answer on-line

Select ERP Configuration Lecture



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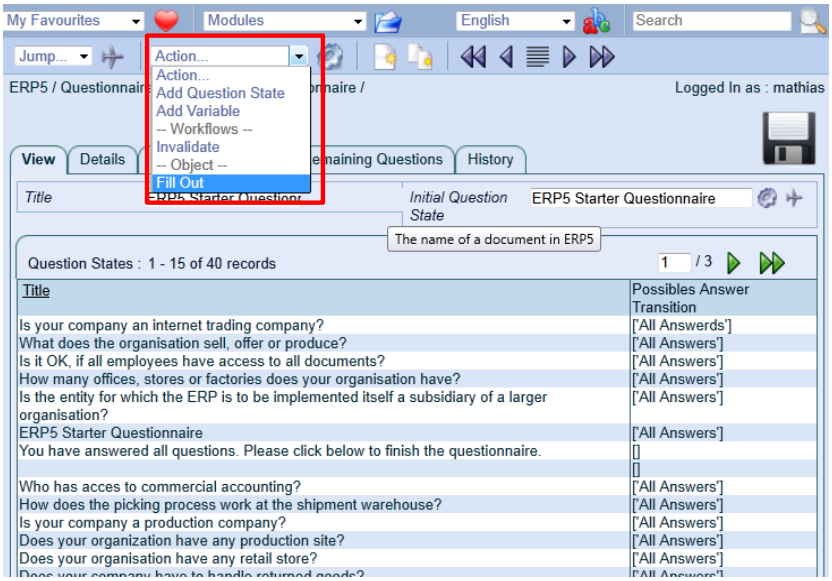
If you an ERP5 Starter client, select *ERP5 Starter Questionnaire*, if you are a Student participating in an OSOE class, select *ERP Configuration Lecture*.

How to fill in the answer on-line

Click on Action.. → Fill Out to start answering the questionnaire



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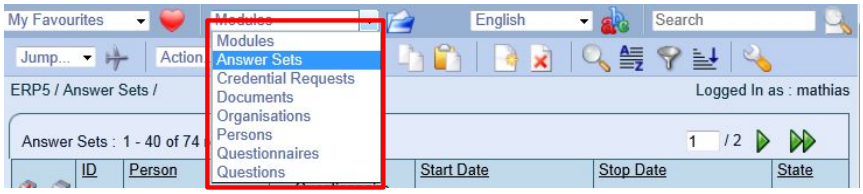
Click Action → Fill Out to start answering the questionnaire.

How to fill in the answer on-line

Fill the answers into the provided fields.

If you have to interrupt the filling of the fields or there is a disconnection of the internet, you can always come back to your answer set by selecting “Answer Sets” in the modules list:



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Fill the answers into the provided fields.

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How to fill in the answer on-line

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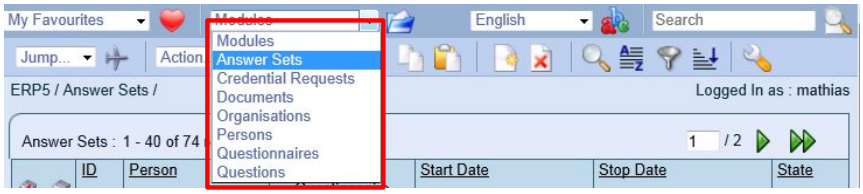

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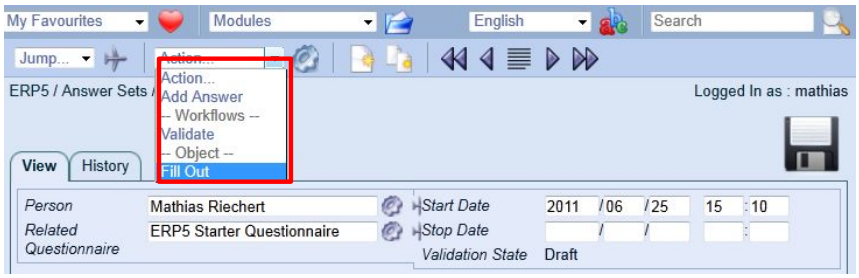
Fill the answers into the provided fields.

If you have to interrupt the filling of the fields or there is a disconnection of the internet, you can always come back to your answer set by selecting “Answer Sets” in the modules list:

How to fill in the answer on-line

Search for your ID and click on the title. You'll then see a List of all answered questions.
If the answer process was interrupted earlier you can continue the filling by clicking on Actions → Fill Out



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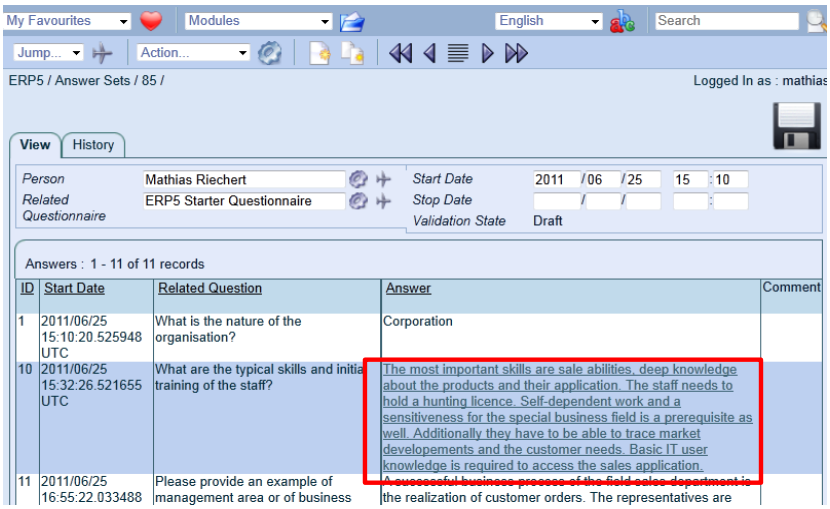
Search for your ID and click on the title. You'll then see a List of all answered questions.

If the answer process was interrupted earlier you can continue the filling by clicking on Actions → Fill Out

How to fill in the answer on-line



You can always change or update answers by clicking on an answer in the list.

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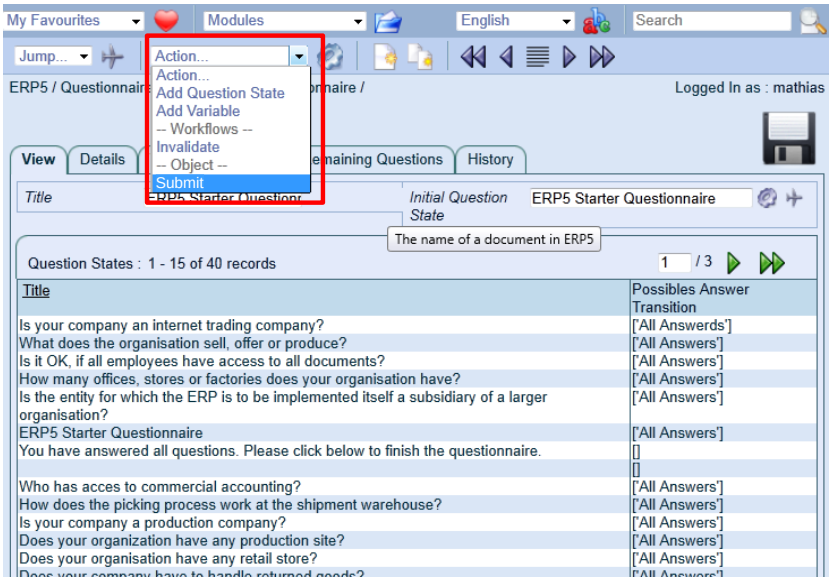
You can always change or update answers by clicking on an answer in the list.

How to fill in the answer on-line

After you finish the questionnaire, please submit it for review.



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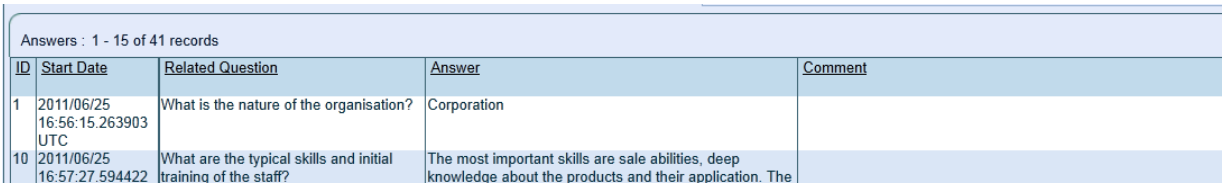
Click Action → Fill Out to start answering the questionnaire.

Grading of the Answers

The questionnaire answers are graded by the professor in the online correction field.



Answers : 1 - 15 of 41 records

ID	Start Date	Related Question	Answer	Comment
1	2011/06/25 16:56:15.263903 UTC	What is the nature of the organisation?	Corporation	
10	2011/06/25 16:57:27.594422	What are the typical skills and initial training of the staff?	The most important skills are sale abilities, deep knowledge about the products and their application. The	

Each answer that has been corrected by the professor is 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.

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The questionnaire answers are graded by the tutor in the online comment field.

Each answer that has to be corrected by the tutor is 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.