

PURCHASING AT EQUI INTERNATIONAL

Proposed Training Plan

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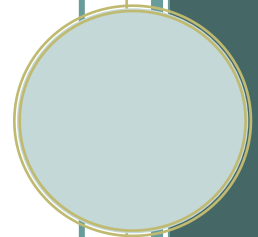


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PROJECT DESCRIPTION

Project Purpose

In 2011, a new company wide update was made to the purchasing process within Equi International. The first change was the introduction of a new Global Sourcing team responsible for maximizing value while reducing risk when acquiring goods and services from our suppliers globally. The second update was the introduction of a new purchasing policy which included two primary methods for purchasing goods and services, purchases using a corporate credit card and purchases made through a purchase requisition in oracle through a new application called iProcurement.

Given the global structure and our segmented business units it was difficult to successfully implement these new purchasing policies, processes, and resources. As a result, adoption was minimal, the purchasing policy has not been followed in many cases, contracts are being signed by individuals on behalf of Equi International instead of consistently controlled by the sourcing team, and when purchases are being made in the new iProcurement system they are being entered incorrectly.

This lack of adoption and inconsistent use of the new purchasing process is subsequently costing the company more money than necessary, opening Equi International up for unnecessary risk, and causing delays in purchasing approvals and delivery of much needed supplies and services to our businesses.

It has been determined that training and resources are necessary for successful adoption and to minimize the company cost and impact of non-adoption.

This document outlines the instructional requirements to bring purchasing staff up-to-speed with the new purchasing process and policies and to introduce them to the steps necessary for a successful purchase through iProcurement.

Description

Are you familiar with our two purchasing methods here at Equi International and where you can go with your questions? This two part e-learning course will introduce you to your dedicated Global Sourcing

team, how they can help you with your purchases, and it will cover our two primary methods for purchasing here at Equi International and when and how to use both methods.

Project Outcomes

- Two e-learning courses will be created for this project.
 - The first will be a 20 minute introduction to purchasing at Equi International covering an introduction to the global sourcing team, how to partner with them, the two methods for purchasing and when to use each, and introduction to the iProcurement system and the 7 step purchasing process.
 - The second e-learning will be a 20 minute e-learning that will demonstrate the steps for accessing iProcurement, the steps involved for creating the three types of PRs in iProcurement, and how to manage a PR once it has been created .
- A glossary of terms will be created for each e-Learning
- 2 training notes/guides will be created (one for each e-Learning) for additional support
- 1 resource guide with regional contacts and intranet links will be created for the course and will be posted to both e-learnings.
- A Global Sourcing purchasing zoom page will be created as a space where purchasing admins can go to find important documents and ask questions. **This portion of the project will be led and created by the Global Sourcing team.**

PROJECT SCOPE

Needs Analysis

After much research I found that knowledge of these new processes and tools was very minimal globally. Those who did know about the purchasing process only knew through word of mouth or by finding the purchasing policy on our company intranet.

During the initial implementation phase emails were sent out to current purchasing admins and to managers across the company with the policy attached. This policy was very technical and overwhelming to read to a purchasing novice. It is my understanding that people managers were expected to share this information with any new purchasing admins on-boarded in the future.

Additionally, an email was sent out companywide introducing the Global Sourcing team and follow-up introductory presentations were given to teams in person by Global Sourcing representatives using a power point deck. Introduction presentations ended after six months due to travel budget cuts and changing priorities.

Since the initial launch, our company has grown significantly, all of our acquisitions have now been on-boarded to Oracle, and at this point no further communications are going out to new purchasing admins about the purchasing processes and policies.

One off “purchasing trainings” are being provided by Global Sourcing representatives as questions arise. Global Sourcing team members are finding that much of their time is being taken up by answering questions or fixing purchasing mistakes in iProcurement instead of focusing on process improvements and finding the best suppliers for our company.

Our company growth is expected to continue, and at this point Sourcing VPs feel it is necessary to adopt a formal training process for our news purchasing admins.

Audience Analysis

The audience for this project will be Global Purchasing Administrators. These administrators are located across our 5 regions, NA, UKI, EMEA, APAC, and LATAM. All regions have local languages, but they work and use resources built in US English. We estimate there to be around 600 purchasing admins globally.

All admins have access to our LMS and are comfortable with online learning, as our mandatory employee compliance training is conducted online through e-learning currently.

We expect that they are fairly familiar with our company purchasing cards and have heard of iProcurement, however they are not familiar with the Global Sourcing team, what part the Global Sourcing team plays in both methods of purchasing, and with their current knowledge level many purchasers are not making purchases according to policy and are making many mistakes.

This audience, much like the rest of the company right now, is extremely busy and is doing more with less. The company has grown significantly

and our acquisition team has not been able to keep up. Our audience does not have much time to dedicate to training, but they are desperate for tools and resources to help them do their jobs correctly and efficiently.

Project Requirements

- Training materials must be in US English
- This curriculum must be provided globally and must accommodate local working times
- Technical Specifications for viewing the training:
 - o Windows users - learners must have Adobe Flash Player 10.3, HTML 5 capabilities, sufficient internet bandwidth, and one of the following browsers:
 - Internet Explorer and later, Google Chrome (latest version), Firefox (latest version), or a Mac browser Safari 7 or later.
 - o Mobile Users:
 - iPad - Apple iOS users – must download the Articulate Mobile Player application for Apple iOS7 or later on iPad
 - Android OS – must download Articulate Mobile Player in Android OS 4.1 or later (optimized for tablets)
- Zoom pages which hold supporting documentation (resource pages and/or job aids) must have appropriate permissions set for all Global Finance users to view.

Constraints and Limitations

- The finance team and the learning and development team do not have budget available for external support for this project
- As requested by our leadership team, the curriculum must be available in our business language (US English). Given this constraint we need to provide a solution that lets learners go at their own pace based upon their comfort with the English language. We also need to have local resources available for questions.
- The e-learning developed will need to be published to our LMS and we will need assistance from our LMS administrator for this.
- There are technical limitations for viewing the training as noted above in the project requirements section. All of the required software and browsers should come as standard on Equi

International computers, however there may be some outliers that have not kept up to date with their software or browser updates and they may have trouble viewing the training. We are expecting these individuals to reach out to helpdesk support as they usually would for computer issues.

COURSE VISION

Terminal Learning Objectives

Following completion of this curriculum learners will be able to:

- Identify when to contact the Global Sourcing team for assistance in the purchasing process
- Explain the two methods for purchasing at Equi International and when to use each
- Summarize the purpose of the iProcurement system
- Recall the 7 step iProcurement Purchasing Process and the proper Equi International team member involved in each step
- Accurately use the iProcurement system and purchasing steps to create and manage (cancel or complete) a catalog, store, and non-catalog purchase requisition.

DELIVERY APPROACH

Design Approach

Giving consideration to the content, motivation of this audience, resources available, and the requirements for this project we will be moving forward with an e-learning approach.

Within these e-learnings we will be using three primary interactive e-learning models. We will be using the mapping and process model, rote interaction model, and technical simulation approach.

Mapping and Process

Using this model will help our learners follow and understand this complex information by organizing it clearly and creating a flow that allows learners to retain perspective while learning the content. This approach helps the learners build on already existing knowledge which encourages retention of new knowledge.

Rote Interaction

Rote interactions are exercises that help our learners in remembering and recalling specific information from the course. This also gives us a chance to provide instant feedback and correct when information is being recalled incorrectly.

Technical Simulation

In the second e-learning course focused on using the iProcurement System, we plan on relying heavily on Technical Simulation. This will enable the learners to experience practicing these new concepts and processes on a mock iProcurement interface. Again, this will give us an opportunity to provide instant feedback and guidance when a process is followed incorrectly.

Assessment

To test the learner's new knowledge and effectiveness of this training there will be knowledge check points throughout each section of each e-learning.

These assessments will be conceptual and judgment based, meaning we will give the learners a chance to understand and apply concepts covered in the e-learning that call for judgment and decision making. Each question will be followed by immediate feedback. The course will be designed so that they learner will not be able to move forward without successfully answering each question. If they incorrectly answer a question they will be redirected to that topic again. When they return to the assessment they can retake it again as many times s needed until they get all questions correct.

COURSE MAP

Course Topics and Outline

Purchasing at Equi International

- Introduction to Purchasing at Equi International – Module 1
 - Introduction
 - Course introduction and topics to be covered
 - Getting Started

- Audio
 - Navigation
- Course Objectives
- Section 1: Introducing Your Global Sourcing Team
 - Section Overview
 - Introducing the Global Sourcing team and what they do
 - How will you work with sourcing?
 - How the Global Sourcing team can help
 - Knowledge Check
 - Section Conclusion
- Section 2: The Equi International Purchasing Process
 - Why does our purchasing process matter?
 - The two methods for purchasing & when to use each
 - Corporate Credit Card
 - When to use the corporate credit card
 - PR through iProcurement
 - When to use iProcurement
 - Knowledge Check
 - Section Conclusion
- Section 3: Introduction to iProcurement
 - What is iProcurement?
 - The 7 Step iProcurement Purchasing Process
 - Knowledge Check
 - Section Conclusion
- Conclusion
 - Why is it important to create a PR correctly?
 - Overall Summary – top takeaways
 - Assessment
 - Thank you

Getting Started in iProcurement – Module 2

- Getting Started in iProcurement – Module 2
 - Welcome and Introduction to Module 2
 - Course introduction and topics to be covered
 - Getting Started
 - Audio
 - Navigation

- Course Objectives
- Section 1 – Getting Started with iProcurement
 - How to Access iProcurement
 - iProcurement Homepage Overview
 - Shop Tab
 - Quick Links
 - Stores Header
 - My Requisitions Header
 - My Notifications
 - Requisitions Tab Overview
 - Copy, cancel, change, and complete buttons
 - Search
 - Knowledge Check
 - Section conclusion
- Section 2 – Creating a Requisition
 - The three types of Purchase Requisitions you can create and when to use each
 - Creating a Catalog PR
 - Selecting Items
 - View Cart
 - Delivery and Billing Information
 - Managing Approvals
 - Review and Submit
 - Creating a Store Requisition
 - Selecting Your Items
 - View Cart
 - Following the Check Out Process Previously Demonstrated
 - Creating a Non-Catalog Requisition
 - Introduction to This Unique Process
 - The three items you will need to proceed
 - Purchase Category
 - Using the PECs tool
 - Supplier Name
 - Search for your supplier
 - Supporting Documentation
 - Filling out the Non-Catalog Requisition Form

- Viewing Your Cart
 - Delivery and Billing
 - Manager Approvals, Notes, and Attachments
 - Review and Submit
- Knowledge Check
- Section Conclusion
- Section 3: Managing an Existing PR
 - How to find your PR and PO
 - Steps for searching for your PR and PO
 - How to edit, cancel, and complete your PR
 - Steps for canceling your PR
 - Steps for editing and completing your PR
 - Knowledge Check
 - Section Conclusion
- Conclusion
 - Overall Summary
 - Next Steps
 - Thank You

Lesson Breakdown for Module 1

Course: Introduction to Purchasing at Equi International			
Lesson	Course Objectives Following completion of this course learners will be able to:	Lesson Objectives Following completion of this lesson learners will be able to:	Activity
Introducing Your Global Sourcing Team	Identify when to contact the Global Sourcing team for assistance in the purchasing process	<p>Explain the role of the Global Sourcing Team</p> <p>Explain 3 ways the Global Sourcing team can partner with you to make your purchasing process more efficient</p>	<p>Exploring activity where user follows "Mindy" a new employee as she meets 4 Global Sourcing Team members who explain how they can help her.</p> <p>2 Assessment questions at end</p>
The Equi International	Explain the two methods for	Recall the two ways to purchase	Information will be provided through

Purchasing Process	<p>purchasing at Equi International and when to use each</p> <p>Summarize the purpose of the iProcurement system</p>	<p>items through sourcing and when to use each</p> <p>Summarize the purpose of the iProcurement System</p>	<p>narration and guided discovery with layers.</p> <p>Participant will later be asked to recall when to use each method of purchasing.</p>
The Equi International Purchasing Process	<p>Recall the 7 step iProcurement Purchasing Process and which Equi International team member is involved in each step</p>	<p>List the 7 Steps in the iProcurement Purchasing Process and will be able to identify each key team member involved in each step</p>	<p>Exploring activity where user will interact and discover the 7 step process by clicking on each step and uncovering information about what is done in that step and who is involved</p> <p>Follow up knowledge check question will ask participants to recall each step and which team member plays a part in each step</p>

Lesson 1 Wire Frame – Free navigation to any point



COURSE EVALUATIONS

Level 1. We may be able to provide a pre-course evaluation to see currently knowledge level of the company purchasing system and processes.

A post-course evaluation will assess participant satisfaction and initial thoughts immediately upon completion of the course.

Level 2. At the end of each section there will be a knowledge check assessing their knowledge of the content just reviewed.

Level 3. A short survey of purchasing supervisors 6 months after completion of the training will provide an assessment of learning transfer to the job.

A touch base with purchasing admins at 6 months after completion to discuss any changes in iProcurement system usage such as lower inaccuracies and questions.

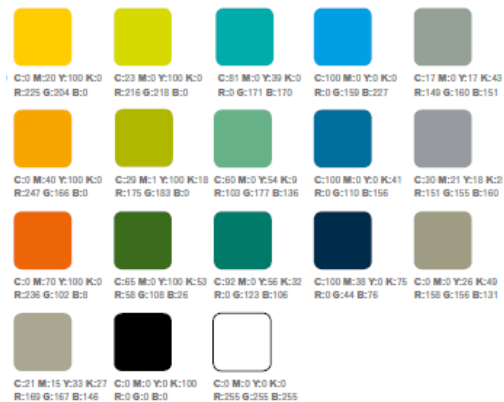
STYLE GUIDE

Player layout



- Player to be our light grey template
- Seekbar, audio, previous, and next buttons to be present at bottom of screen.
- Menu to be shown with topics for navigation
- Transcript to be shown as "Notes" next to Menu
- Glossary and Resources to be link at top right of page
- Logo to be at the top left side of player

Color Palette



Typography

- Primary Font: Century Gothic
- Secondary Font: *Segoe Print*

Visuals

- Keep headlines short and impactful on screens

- When choosing images make sure they support and enhance the message
- Positive, culturally sensitive/diverse, and representative of our company

Tone and Language

The overall tone we're aiming for is human and personal. To achieve this we want to make use of casual, simple, and accessible language. Think of this as a conversation with the audience and instead of a presentation.

QUALITY ASSURANCE

Three Level Quality Assurance Plan

Alpha Testing

The first level of testing will occur with the internal project team. When the Alpha version of the training is released the project team will be notified via email. In this email there will be a direct link to the Alpha training, instructions for testing, as well as a feedback form the team can use to document their suggested feedback/changes. The project team will then meet to discuss feedback and to agree on which changes to include in the training. The instructional designer will then make these updates and we will have the Beta version of the training.

Beta Testing

The second level of testing will occur with the external pilot group. These will be audience members identified by the project team as prime examples of our audience. The Project Sponsor or Instructional Design will send an email to the pilot group explaining the training, our current status, our testing request, instructions for testing, a link to the training, and a feedback form they can use to document their suggested feedback/changes. The pilot group will have five days to review the training. The project team will then meet to discuss suggested changes/feedback from the pilot group and which items to include in the final version of our training. The instructional designer will then make updates and will publish our Gold version of the training for loading to the LMS.

Gold Testing

Once the Gold version of the training is loaded to the LMS the instructional design and SMEs will review it one last time for any remaining items before our official release communication.

PROJECT TIMELINE & MILESTONES

Project Plan for Module 1

Phase	Objectives	Who	Deliverables	Deadline
Assess	<ul style="list-style-type: none">• Meeting with Project Team (SME, Sponsor, and ID) to do needs and audience assessment• Reviewing existing and prerequisite materials• Define needs and learning objectives• Determine delivery methods• Organize training outlines and create outline• Select learning strategies/activities	<ul style="list-style-type: none">• Project Team• SME & ID• SME & ID• ID• ID• ID	<ul style="list-style-type: none">• Instructional design document• Approval of Instructional Design from Project Team	July - Completed
Design	<ul style="list-style-type: none">• Design look and feel• Design PPT template• Design graphics• Design pre and post assessments• Write training content• Meet with project team to review and approve design progress	<ul style="list-style-type: none">• ID• SME & ID• Sponsor, SME & ID	<ul style="list-style-type: none">• Storyboard• Approvals	Beginning of August - Completed
Develop	<ul style="list-style-type: none">• Create elearning course – module 1	<ul style="list-style-type: none">• ID	<ul style="list-style-type: none">• Alpha and Beta versions	August

	<ul style="list-style-type: none"> • Create training assessments • Create Job Aid • Create Resource Guide • Submit materials for review • Alpha & Beta test elearning course in LMS with internally with team and with external pilot team (Testing instructions will be provided outside of this document) • Project team to meet and discuss feedback from testers • Incorporate refinements to module 1 	<ul style="list-style-type: none"> • SME, ID, Pilot Testers • SME & ID • ID 	<ul style="list-style-type: none"> • of module 1 • Testing forms will be completed by testers • Final version of module 1 will be provided 	
Deploy	<ul style="list-style-type: none"> • Final version of module 1 to be published for LMS and new content intake form to be filled out. • Training to be loaded to LMS by administrator • Deployment communications plan to be developed and managed by Global Sourcing 	<ul style="list-style-type: none"> • ID • LMS Administrator & ID • Sponsor, SME, Global Sourcing 	<ul style="list-style-type: none"> • Final version of module 1 • New content intake form for module 1 	September
Evaluate	<ul style="list-style-type: none"> • Survey developed and sent to purchasing supervisors to determine if learning has transferred and 	<ul style="list-style-type: none"> • ID, Purchasing Supervisors, and iProc team 	<ul style="list-style-type: none"> • Survey for purchasing supervisors • Meeting with iProc team to discuss behavioral 	March

	<p>been applied to the job.</p> <ul style="list-style-type: none"> • Meeting with iProc team to discuss behavioral changes observed since training was released. Any changes in amount of questions? • Identify and incorporate any changes needed to learner • Provide usage and impact report to ID team. 		<p>changes</p> <ul style="list-style-type: none"> • Provide usage and impact report to ID team • Assessment and additional changes if needed to training 	
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STORYBOARD

INTRODUCTION TO PURCHASING AT EQUI INTERNATIONAL STORYBOARD

1. INTRODUCTION TO PURCHASING AT EQUI INTERNATIONAL

1.1 Welcome



Notes:

Welcome to this first module in the Purchasing training series - *Introduction to Purchasing at Equi International*.

This course covers an introduction to the Global Sourcing team, how you partner with them for purchasing, the two methods for purchasing goods and services here at Equi International, and when to use each method.

Before jumping into the training, let's go through a few items to get you started.

Screen Notes:

- Fade up welcome
- Fade in name of course
- Fade in next text and arrow

1.2 Audio



Notes:

First, this training contains audio.

You can find the transcript of this audio by selecting the 'Notes' tab at the top left of your screen next to the 'Menu' tab.

Screen Notes:

- Fade in text on screen

1.3 Navigation



Notes:

The second item to get you started is navigation.

To navigate this training start by selecting the 'Next' button to advance to the next slide and the 'Previous' button to return to a previous slide.

You can pause or play a slide at any point by selecting the 'Play' button.

Your progress is recorded as you go along. You can leave this training at any point and when you return you can begin where you left off.

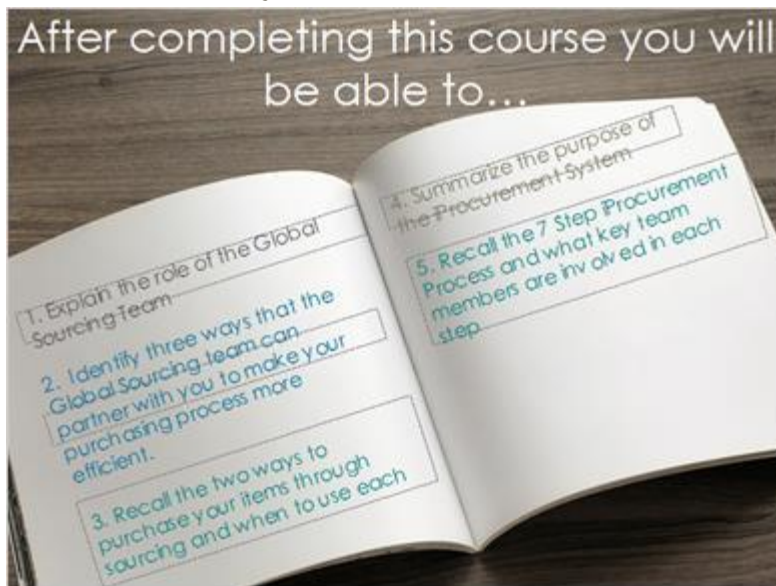
Within this training you will find a glossary, a list of helpful resources such as regional email addresses for your questions, and notes from this training.

You can access these items via the links at the top right of this page.

Screen Notes:

- Fade in text on screen and button images.

1.4 Course Objectives



Notes:

After completing this course you will be able to meet the following objectives.

When you are finished reading them over, select 'Next' to continue.

Screen Notes:

- Fade in book with objectives

2. SECTION 1

2.1 SECTION 1 - Introducing Your Global Sourcing Team

SECTION 1

Introducing Your Global Sourcing Team

Notes:

Section 1 - Introducing Your Global Sourcing Team

In this section we will be reviewing the role of the Global Sourcing team in purchasing, and the common ways you will work with them through your purchasing experience.

Screen Notes:

- Wipe in section intro

2.2 Who is the Global Sourcing Team?



Notes:

As a global company, Equi International seeks to maximize value while reducing risk

when acquiring goods and services from our suppliers.

To ensure this, we have Global Sourcing teams across the globe who work closely with the business to aggregate spend, share best practices, and to ensure that purchasing decisions are objective and meet Equi International's ethical and professional standards.

Screen Notes:

- Wipe up "global sourcing team" text
- Green screen fade in over image
- Fly in right to left ovals

2.3 How will Global Sourcing help you? Learner Interaction

(Text Entry, 10 points, 1 attempt permitted)



Screen Notes:

User types their initial thoughts into the box.

Feedback when correct:

The Global Sourcing team can make your life easier by helping with a number of different things! Let's learn more!

How will Global Sourcing Help You? (Feedback Slide Layer)



2.4 Mindy Meets the Global Sourcing Team



Notes:

This is Mindy.

Mindy has just started at Equi International. She is familiar with the purchasing process, but is not familiar with how she should work with the Global Sourcing to maximize her purchase.

She reaches out to 3 different Global Sourcing team members to learn more about how they can help her with her future purchases.

Click each Global Sourcing team member below.

Screen Notes:

- Screen interaction where learner clicks on each image.

Mindy Meets – Bill (Slide Layer)

Bill

I help purchasers by **working with suppliers to negotiate commercial and legal terms.**

I then **create and validate contracts** on the company's behalf. This takes the burden off of the purchaser!



Mindy Meets - Susan (Slide Layer)


Susan

I help our purchasing community by **creating Purchase Orders**, or "POs", as they are commonly known.

I then **send the PO to the Supplier.**






Mindy Meets - Laura (Slide Layer)



Laura

One of the most common ways I help purchasers is by **partnering with them to find the right supplier**. By being part of this process we can ensure you are paying a competitive price for the goods and services you need

2.5 What are some ways the Global Sourcing team can help Mindy with her next purchase? Knowledge Check
 (Multiple Response, 10 points, 2 attempts permitted)

Knowledge Check

What are some ways the Global Sourcing team can help Mindy with her next purchase?

Select the best options below

- ☒ They can help with supplier negotiations and contracts
- ☐ They can help with creating a Purchase Requisition
- ☒ They can help with identifying if an existing supplier can be used for a purchase or if a new supplier should be used
- ☐ They can help with overriding approvals in the purchasing system when my manager is out of the office
- ☒ They can help with creating the PO for my purchase and delivering it to the supplier



Correct	Choice
X	They can help with supplier negotiations and contracts
	They can help with creating a Purchase Requisition
X	They can help with identifying if an existing supplier can be used for a purchase or if a new supplier should be used
	They can help with overriding approvals in the purchasing system when my manager is out of the office
X	They can help with creating the PO for my purchase and delivering it to the

supplier

Feedback when correct:

That's right! You selected the correct response.

Feedback when incorrect:

You did not select the correct response. Please review this section again.

Notes:

Assessment Question 1

Correct (Slide Layer)

Knowledge Check

What are some ways the Global Sourcing team can help Mindy with her next purchase?


Select the best options below

- ☒ They can help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with overriding approvals in the purchasing system when my manager is out of the office
- ☒ They can be used to help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with creating the PO for my purchase and delivering it to the supplier

Correct

That's right! You selected the correct response.

Continue



Incorrect (Slide Layer)

Knowledge Check

What are some ways the Global Sourcing team can help Mindy with her next purchase?


Select the best options below

- ☒ They can help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with overriding approvals in the purchasing system when my manager is out of the office
- ☐ They can help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with creating the PO for my purchase and delivering it to the supplier

Incorrect

You did not select the correct response. Please review this section again.

Continue



Try Again (Slide Layer)

Knowledge Check

What are some ways the Global Sourcing team can help Mindy with her next purchase?


Select the best options below

- ☒ They can help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with overriding approvals in the purchasing system when my manager is out of the office
- ☐ They can help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with creating the PO for my purchase and delivering it to the supplier
- ☐ They can help with creating the PO for my purchase and delivering it to the supplier

Incorrect

That is incorrect. Please try again.

Try Again



2.6 Section 1 Conclusion



Notes:

Now that you know what global sourcing is and how they can help you with purchasing your goods and services, next we will review the two methods for purchasing.

This concludes Section 1. Select the button below to move on to Section 2.

Screen Notes:

- Box/Font fade in and move to top of screen
- Button to fade in at end of slide

3. SECTION 2

3.1 SECTION 2 - Purchasing at Equi International

SECTION 2

Purchasing at Equi International

Notes:

Section 2 - Purchasing at Equi International

In this section we will be reviewing why the purchasing process is important to you and the company, the two methods you can use to purchase goods and services through Sourcing, and when to use each.

Screen Notes:

- Section fade in

3.2 Why does our procurement process matter?



Notes:

Why does our purchasing process matter?

Screen Notes:

- Font writes on white wall and automatically moves to next slide

3.3 Why it matters to you and Equi International



Notes:

Our purchasing process matters because it provides transparency, efficiency, reduces risk, and ensures proper financial approvals for requested goods and services prior to any commitment to purchase by Equi International.

It matters to you because not only does it make it easier and faster to get the goods and services you need by streamlining the process of purchasing, but it also ensures you are getting the best value for your purchases.

Screen Notes:

- Images fade in

3.4 The two methods of purchasing



Notes:

You can engage the Global Sourcing team to buy goods and services through one of two methods depending on amount and or type of purchase.

The first type of purchase is directly with a supplier using your Company Purchasing Card, or for suppliers that do not accept our company cards you can use Paperless Payment Requests also known as PPRs.

The second type of purchase is via a Purchase Requisition through iProcurement

Select each type of purchasing method on this screen to learn more about when you should use each of these methods to purchase.

Screen Note:

- Images fade in
- Both methods are buttons

The two methods of purchasing (Slide Layer 1)

1

Purchase Directly With a Supplier

Employee places order with Company Purchasing Card or PPR

When an employee purchases directly with a supplier

- Payment is made with their Company Purchasing Card or through a Paperless Payment Request (PPR)
- These types of purchases **must fall within the Purchasing Card Policy**
- This is for purchases below your card limit at **\$500 or less**

2 Methods of Purchasing

The two methods of purchasing (Slide Layer 2)

When an employee creates a PR in iProcurement

- it is to purchase pre-negotiated items, managed categories, or purchases greater than their \$500 purchasing card limit

Pre Negotiated Items Examples	Managed Category Examples
Office Supplies Staples	Data Hardware & Software
Stationery & business cards Graphics International	Outsourcing & Offshoring
	Marketing

2

Purchase Requisition in iProcurement

Employee places order in iProcurement

2 Methods of Purchasing

3.5 Knowledge Check

(Drag and Drop, 10 points, 2 attempts permitted)



Drag Item	Drop Target
Conference tickets \$200	Company Purchasing Card Method
A new computer for \$1000	iProcurement Purchase Requisition
Development books \$500	Company Purchasing Card Method

Drag and drop properties
Snap dropped items to drop target (Stack random)
Delay item drop states until interaction is submitted

Feedback when correct:

That's right! You selected the correct response.

Feedback when incorrect:

You did not select the correct response.

Correct (Slide Layer)



Incorrect (Slide Layer)



Try Again (Slide Layer)



3.6 Section 2 Conclusion



Notes:

Now that you know why the purchasing process matters and the two methods for purchasing and when to use each, next we will introduce the iProcurement System and the 7 step purchasing process.

This concludes Section 2.

Click the button below to continue to Section 3.

Screen Notes:

- Box/Font fade in and move to top of screen
- Button to fade in at end of slide

4. SECTION 3

4.1 SECTION 3 - Introduction to iProcurement



Notes:

Section 3 - Introduction to iProcurement

In this section we will be reviewing what iProcurement is and the 7 step purchasing process through iProcurement.

Screen Notes:

- Section fades in

4.2 What is iProcurement?



Notes:

What is iProcurement?

iProcurement, also known as Procurement Express, is a web based shopping system connected to Oracle that streamlines your purchasing by empowering you to create, manage, and track your own purchasing orders in one location.

Screen Notes:

- "What is iProcurement" text fades in center and moves to top
- White box with text fades in little by little

4.3 7 Step Purchasing Process in iProcurement



Notes:

How does it work?

To purchase a product or service through iProcurement there is a 7 step purchasing process.

Select next to investigate what these process steps are, what happens in each step, and who the key players are within each step.

4.4 Timeline Interaction – The 7 Step Process



Notes:

As mentioned on the previous screen, the purchasing process in iProcurement consists of 7 steps.

In each step, a different team member will play a key role.

Can you identify who is responsible for each step and what they are responsible for?


Click on each step to the left to investigate.

Screen Notes:

- Each step is clickable and opens a different layer

Step 1 (Slide Layer)


- Step 1 Access iProcurement
- Step 2 – Create a PR
- Step 3 – Receive Manager Approval
- Step 4 – Sourcing Process
- Step 5 – PO Created
- Step 6 – Product Delivered
- Step 7 - Payment



Step 1 – Accessing iProcurement

When you have identified that an item needs to be purchased through a purchase requisition, the initial step is for you to sign into Oracle and access your iProcurement home page.

We'll be going through the details of this login process in the second module of this training series.



Step 2 (Slide Layer)

- Step 1 Access iProcurement
- Step 2 – Create a PR
- Step 3 – Receive Manager Approval
- Step 4 – Sourcing Process
- Step 5 – PO Created
- Step 6 – Product Delivered
- Step 7 - Payment



Step 2 – Creating a PR

Once you are in iProcurement, you start the second step by creating a purchase requisition (or PR) to purchase this item or service.

A purchase requisition is a formal request sent to the Global Sourcing team letting them know that you intended to purchase this item or service.



Step 3 (Slide Layer)

- Step 1 Access iProcurement
- Step 2 – Create a PR
- Step 3 – Receive Manager Approval
- Step 4 – Sourcing Process
- Step 5 – PO Created
- Step 6 – Product Delivered
- Step 7 - Payment



Step 3 – Manager Approval

In the third step, your purchase requisition is sent for approval to either your **direct manager** in Oracle or to **someone else** (that you have identified with equal approval authority in Oracle).

Once it is approved, the approval will be captured on your PR in Oracle.



Step 4 (Slide Layer)

- Step 1 Access iProcurement
- Step 2 – Create a PR
- Step 3 – Receive Manager Approval
- Step 4 – Sourcing Process
- Step 5 – PO Created
- Step 6 – Product Delivered
- Step 7 - Payment



Step 4 – Sourcing contract and negotiations

In the fourth step your PR will go to the **Global Sourcing team** for final contracting and negotiation.

Once the terms are agreed between the Sourcing buyer and the supplier, the buyer will work with you and the supplier to finalize documents prior to placement of your order.



Step 5 (Slide Layer)

- Step 1 Access iProcurement
- Step 2 – Create a PR
- Step 3 – Receive Manager Approval
- Step 4 – Sourcing Process
- Step 5 – PO Created
- Step 6 – Product Delivered
- Step 7 - Payment



Step 5 – Purchase Order is Created

In the fifth step a purchase order (PO) is created by Global Sourcing and sent to the buyer.

The PO indicates the specifics of your purchase request such as types, quantities, and agreed prices for products and services.



Step 6 (Slide Layer)

- Step 1 Access iProcurement
- Step 2 – Create a PR
- Step 3 – Receive Manager Approval
- Step 4 – Sourcing Process
- Step 5 – PO Created
- Step 6 – Product Delivered
- Step 7 - Payment



Step 6 – Product delivered or service is rendered

After the supplier accepts the purchase order, in the sixth step the supplier proceeds to ship the order or render services.



Step 7 (Slide Layer)



4.5 Knowledge Check

(Drag and Drop, 10 points, 2 attempts permitted)

Knowledge Check

Drag the first 6 steps in the iProcurement Purchasing process below on to the primary team member who is responsible for that step.

Step 1
Access iProcurement

Step 2
Create a PR

Step 3
PR Approval

Step 4
Contract & Negotiation

Step 5
PO Creation and delivery

Step 6
Product delivery

Step 7
Payment
Applies to all – do not drag.



Mindy the Buyer



Laura Sourcing



Mike the Manager



The Supplier

Drag Item	Drop Target
Step 1 Access iProcurement	Character 1
Step 2 Create a PR	Character 1
Step 3 PR Approval	Character 3
Step 4 Contract & Negotiation	Character 2

Step 5 PO Creation and delivery	Character 2
Step 6 Product delivery	Character 4

Drag and drop properties
Return item to start point if dropped outside the correct drop target
Snap dropped items to drop target (Stack random)
Delay item drop states until interaction is submitted

Feedback when correct:

That's right! You selected the correct response.

Feedback when incorrect:

You did not select the correct response. Please review the previous slide.

Correct (Slide Layer)

Knowledge Check

Drag the first 6 steps in the iProcurement Purchasing process below on to the primary team member who is responsible for that step.

Step 1: Access iProcurement
Step 2: Create a PP
Step 3: PP Approval
Step 4: Contract & Negotiation
Step 5: PO Creation and delivery
Step 6: Product delivery

Correct

That's right! You selected the correct response.

Continue

Mindy the Buyer
Laura Sourcing
Mike the Manager
The Supplier

Incorrect (Slide Layer)

Knowledge Check

Drag the first 6 steps in the iProcurement Purchasing process below on to the primary team member who is responsible for that step.

Step 1
Access
iProcurement

Step 2
Create a RF

Step 3
RF Approval

Step 4
Contract &
Negotiation


PO and

to 7
ment
do not drag.


Mindy the
Buyer


Laura
Sourcing


Mike the
Manager


The
Supplier

Incorrect

You did not select the correct response. Please review the previous slide.

Continue

Try Again (Slide Layer)

Knowledge Check

Drag the first 6 steps in the iProcurement Purchasing process below on to the primary team member who is responsible for that step.

Step 1
Access
iProcurement

Step 2
Create a RF

Step 3
RF Approval

Step 4
Contract &
Negotiation

PO and

to 7
ment
do not drag.


Mindy the
Buyer


Laura
Sourcing


Mike the
Manager

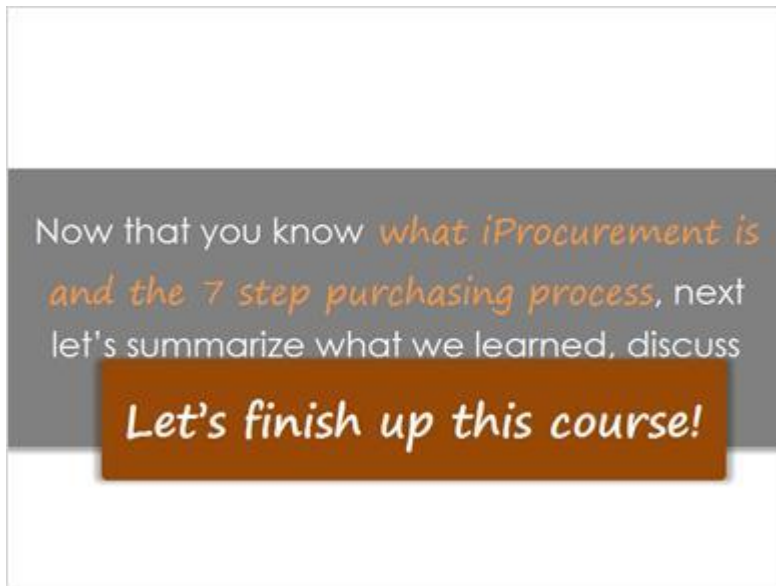

The
Supplier

Incorrect

That is incorrect. Please try again.

Try Again

4.6 Section 3 Conclusion



Notes:

Now that you know what iProcurement is and the 7 step purchasing process, next let's summarize what we learned, discuss next steps and finish up this course.

This concludes Section 3.

Select the button below to continue.

Screen Notes:

- Box/Font fade in and move to top of screen
- Button to fade in at end of slide

5. MODULE CONCLUSION

5.1 The importance of creating a PR correctly & Next Steps



Notes:

Before we summarize what we've learned in this module, please remember before you start creating your next purchase requisition in iProcurement, in order for you to get the full benefit of using iProcurement it is critical for you to use it correctly.

If requisitions are done incorrectly, PO creation can be delayed, purchases may be paid for out of the wrong business unit, approvals might be given by the wrong person, or your product may be delayed or not even delivered to the right location.

When you are done with this module, to learn the steps for correctly creating, submitting, and approving a purchase requisition in iProcurement, please review the second module in this purchasing learning series - *"Getting Started with iProcurement"*.

You will find a link to Module 2 at the end of this training.

As a reminder, if you are a new user of iProcurement in order to gain access to Oracle iProcurement you will need to pass the quiz at the end of Module 2.

5.2 Module 1 Summary



Notes:

As a final summary of this module, we reviewed the role of the Global Sourcing team, how they support you in the purchasing process, the two methods for purchasing using a purchasing card or iProcurement, and when to use both methods, and we introduced iProcurement and the 7 step purchasing process.

This concludes module 1, an Introduction to Purchasing at Equi International.

To mark this training as complete and to access a link to Module 2, please select 'Next'.

Screen Notes:

- Text fades in

5.3 Helpful Resources

Thank you for completing module 1

RESOURCES

 **Still have questions?** Reach out to your regional team using the emails listed in the regional resource document located in the resources above.

 Want a refresher on these topics later on? Download the training notes from this module using the resource button above.

Ready to move on to Module 2? Click below!

Module 2 – Getting Started with iProcurement

This link does not work in this version of the training.

Notes:

No audio

Screen Notes:

- Module 2 button when link to module 2 training

PROJECT SIGNOFF

Sponsor

Project Manager / Planner

CHANGE LOG

Editor	Date Edited	Notes on changes
Deanna Fischer	8/21/2015	Updated version of Instructional Design document