

# PROCUREMENT

## Lesson Plan - September 18, 2021

At the end of the *Procurement* lesson, the client and targeted users will be able to perform all the necessary configurations and actions to use the catalogue in **maestro\***, enter orders, use the accrued costs management, and receipts of goods.

### Unit PRO01 - Preliminary Analysis and Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson the user will be able to differentiate order types in <b>maestro*</b> and will have made the configurations specific to the procurement cycle.</p> <p><i>PREREQUISITE</i></p> <ul style="list-style-type: none"> <li>• Security</li> <li>• General Ledger</li> <li>• Project Management</li> <li>• Accounts Payable</li> </ul> <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none"> <li>• Contact Management</li> <li>• Document Management</li> <li>• Accrued Costs (Inventory and Project)</li> </ul>	<ul style="list-style-type: none"> <li>• Analysis;</li> <li>• Configurations (Purchasing);               <ul style="list-style-type: none"> <li>• General</li> <li>• Inventory</li> <li>• Stock Orders from Catalogue</li> <li>• Return of Merchandise</li> <li>• Receipt of Goods</li> </ul> </li> <li>• Discussion on the three types of orders (regular, project, and catalogue);</li> <li>• Discussion on accrued costs - project.</li> </ul>	<ul style="list-style-type: none"> <li>• Discussion on the current process (strengths and weaknesses);</li> <li>• Discussion on the types of transactions to enter (particular cases);</li> <li>• Explanation and basic configurations, which will guide the implementation;</li> <li>• Discussion on the use of the catalogue;</li> <li>• Decision-making.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>• Reflect on the discussions</li> </ul>	1.5h	<ul style="list-style-type: none"> <li>• Concept - <a href="#">The Procurement Cycle</a></li> <li>• Concept - <a href="#">The maestro*</a> <a href="#">Catalogue</a></li> <li>• Training Document APP01</li> </ul>	Pilot

## Unit PRO02 - Catalogue Management

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the designated users will be able to complete all the necessary configurations to use the <b>maestro*</b> catalogue.	<ul style="list-style-type: none"> <li>Define Item Types</li> <li>Define Categories</li> <li>Define Item Classifications</li> <li>Define Characteristics</li> <li>Define Units of Measure</li> <li>Define Bill of Materials</li> <li>Define Manufacturers</li> <li>Define Kind of Items</li> <li>Catalogue Management</li> <li>Supplier Discounts Table</li> </ul>	<ul style="list-style-type: none"> <li>Review of previous notions and validation of homework;</li> <li>Explanation and completion of the different catalogue management windows, according to the client's needs and software requirements, to automate data entry;</li> <li>Import of the different catalogue databases as <i>Excel</i> files in needed;</li> <li>Decision making.</li> </ul> <p>HOMEWORK</p> <ul style="list-style-type: none"> <li><i>Finalize configurations and data entry, if needed.</i></li> </ul>	<p>3h +</p> <p>6 x 1.5h</p> <p>(to plan during the implementation, if needed)</p>	<ul style="list-style-type: none"> <li>Training Document APP02</li> <li>Concept - <a href="#">The maestro*</a> <a href="#">Catalogue</a></li> </ul>	Pilot and/or Super Users

## Unit PRO03 - Configurations - Orders

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>At the end of this lesson, the designated users will be able to complete all the necessary configurations required for orders entry the approval workflow in <b>maestro*</b>.</p>	<ul style="list-style-type: none"> <li>• Item Management</li> <li>• Define Addresses</li> <li>• Define Abbreviations</li> <li>• Define Specifications</li> <li>• Define Discount Codes</li> <li>• Early Payment Discount Codes</li> <li>• Order Status Codes Table</li> <li>• Approval Workflow</li> </ul>	<ul style="list-style-type: none"> <li>• Review of previous notions and validation of homework;</li> <li>• Explanation and completion of the different catalogue management windows, according to the client's needs and software requirements, to automate data entry;</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>• <i>Finalize databases</i></li> </ul>	<p>1.5h</p>	<ul style="list-style-type: none"> <li>• Training document APP03</li> </ul>	<p>Pilot and/or Super Users</p>

## Unit PRO04 - Operations - Orders

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson, the designated users will be able to complete the order cycle in <b>maestro*</b>.</p>	<ul style="list-style-type: none"> <li>• Purchase Order</li> <li>• Project Order</li> <li>• Stock Order from Catalogue</li> <li>• Print Purchase Orders</li> <li>• Reprint Purchase Orders</li> <li>• Activate Orders</li> <li>• Request for Delivery</li> <li>• Receipt of Goods</li> <li>• Quantities on Order</li> <li>• Order Invoicing</li> </ul>	<ul style="list-style-type: none"> <li>• Review of previous notions and validation of homework;</li> <li>• Implementation of the established procurement process;</li> <li>• Explanation and demonstration of the different procurement workflow windows, according to the client's needs and system requirements.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>• Practice entering transactions</li> </ul>	<p>3h</p>	<ul style="list-style-type: none"> <li>• Training document APP04</li> </ul>	<p>Pilot and/or Super Users</p>

## Unit PRO05 - Operational Training - Orders

### Optional Session - Training of the client's employees with the implementation specialist

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, users will be able to use <b>maestro*</b> to complete the order cycle.	<ul style="list-style-type: none"> <li>• Purchase Order</li> <li>• Project Order</li> <li>• Stock Order from Catalogue</li> <li>• PrintPurchase Orders</li> <li>• Reprint Purchase Orders</li> <li>• Activate Orders</li> <li>• Request for Delivery</li> <li>• Receipt of Goods</li> <li>• Quantities on Order</li> <li>• Order Invoicing</li> </ul>	<ul style="list-style-type: none"> <li>• Review of previous concepts and validation of completed tasks as homework;</li> <li>• Explanation and demonstration of the different procurement workflow windows, according to the client's needs and system requirements.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>• <i>Practice entering transactions</i></li> </ul>	3h	<ul style="list-style-type: none"> <li>• Training document APP04</li> </ul>	Pilot Super Users Users

## Unit PRO06- Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson, the client will have shown they have the necessary knowledge and skills to complete the purchase cycle in <b>maestro*</b>.</p>	<ul style="list-style-type: none"> <li>• Order Inquiry</li> <li>• Supplier Inquiry</li> <li>• Project Inquiry</li> <li>• List of Orders</li> </ul>	<ul style="list-style-type: none"> <li>• Review of previous concepts and validation of completed tasks as homework;</li> <li>• Validation and configuration of reports and procurement inquiry.</li> </ul> <p><i>HOMEWORK</i></p> <p><i>Validate data entries.</i></p>	<p>3h</p>		<p>Pilot</p> <p>Super Users</p> <p>Users</p>

## Unit PRO07 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson, the designated users will be able to use the <b>maestro*</b> forms linked to the purchasing cycle, which will have been customized to their needs.</p>	<ul style="list-style-type: none"> <li>• Orders(according to the type used)</li> <li>• Return of Merchandise</li> <li>• Order Estimate</li> <li>• Request for Delivery</li> <li>• Receipt of Goods</li> <li>• Receipt - Return of Merchandise</li> <li>• Labels</li> <li>• Receipt confirmation by email</li> </ul>	<ul style="list-style-type: none"> <li>• Review of previous concepts and validation of completed tasks as homework;</li> <li>• Validation and definition of modifications to be made to the required procurement forms.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>• <i>Validate forms</i></li> </ul>	<p>To be determined</p>		<p>Pilot</p>

## Unit PRO08 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>By the end of this lesson, the client and designated users will have carried out the tests and verifications to validate the configurations made beforehand, and will be able to attest to the adequacy of these configurations with the established processes.</p>	<ul style="list-style-type: none"> <li>• Validation of the process</li> <li>• Validation of accrued costs</li> <li>• Validation of stock shortages</li> <li>• Validation of accounting entries</li> <li>• AP List</li> </ul>	<ul style="list-style-type: none"> <li>• Review of previous concepts and validation of completed tasks as homework;</li> <li>• Test Assistance;</li> <li>• Validation of transactions;</li> <li>• Validation of reports and inquiries;</li> <li>• Review of configurations, if needed;</li> <li>• Review of the process, if needed.</li> </ul> <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <li>• <i>Complete Integrated Tests.</i></li> </ul>	<p>5h</p>		<p>Pilot Users</p>



## Unit PRO09 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the client will have shown the necessary knowledge and skills to complete the purchasing cycle and use the catalogue in <b>maestro*</b> .	<ul style="list-style-type: none"> <li>• Validate learnings;</li> <li>• Review of the security settings applied.</li> </ul>	<ul style="list-style-type: none"> <li>• Preparation of future training lessons                             <ul style="list-style-type: none"> <li>• Subcontracts</li> <li>• Inventory (Catalogue Management)</li> <li>• Requisitions</li> <li>• Shop Drawings</li> </ul> </li> </ul>	1h	Acquired competencies list	Pilot