

REQUISITIONS

Lesson Plan - October 13, 2021

At the end of the *Requisitions* lesson, the customer and targeted users will be able to perform all the necessary configurations and actions to make requisitions in **maestro***, as well as their follow-ups and inquiries.

Unit REQ01 - Preliminary Analysis and Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>The objective of this lesson is to clarify the needs, requirements, and conditions to make requisitions and to perform the basic configurations related to their use in maestro*.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none">• Security;• Stock Order from Catalogue;• Accounts Payable (AP);• Projects. <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none">• Document Management;• Contact Management;• Define Resources by project;	<ul style="list-style-type: none">• Analysis• Configurations - Requisitions;• Configurations - Forms.	<ul style="list-style-type: none">• Discussion on the current and futur process (strengths and weaknesses);• Discussion on the types of transactions that can be entered in maestro* (specific cases);• Set up of the required configurations for the implementation;• Decision-making. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none">• Reflect on the discussions.	30 min.	<ul style="list-style-type: none">• Training document REQ01¹	Pilot

¹This training document is under development.

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<ul style="list-style-type: none"> • <i>Catalogue Management;</i> • <i>Inventory Management.</i> 					

Unit REQ02 - Operations - Requisitions

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
The objective of this lesson is to give the user the needed tools to make and close requisitions in maestro* , as well as manage inventory outputs.	<ul style="list-style-type: none"> • Requisitions; • Requisitions; Supplier Order; • Inventory Issue (Inventory - optional); • Closing a Requisition; • <i>Excel</i> Import. 	<ul style="list-style-type: none"> • Explanation and completion of the different requisition windows, in accordance to the client's needs and software requirements; • Explanation of the different requisition types, according to the client's modules: <ul style="list-style-type: none"> • Requisitions with a supplier stock order; • Requisitions - Inventory Issue (optional); • Requisitions - Many purchase orders; • Compile Requisitions. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • <i>Test the various scenarios and processes.</i> 	3h	<ul style="list-style-type: none"> • Training document REQ02¹ • Template for Excel file import (FI) 	Pilot and/or Super Users

¹This training document is under development.

Unit REQ03 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer and identified user will be able to use maestro* 's analysis and report tools to find the information they need to follow-up on requisitions.	<ul style="list-style-type: none"> Requisition Progress; Requisition Inquiry. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Validation and configuration of the Requisition Progress Report. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Validate the data entered in maestro*.</i> 	30 min.	<ul style="list-style-type: none"> Training document REQ03¹ 	Pilot Super Users and/or Users

Unit REQ04 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson the customer will be able to use the standard maestro* forms defined to meet their needs.	<ul style="list-style-type: none"> Requisitions; Incomplete Requisition. 	N/A	To be Determined		Pilot

¹This training document is under development.

Unit REQ05 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer 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.	<ul style="list-style-type: none"> Validation of the requisition process. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Test Assistance; Transaction Validations; Validation of reports and inquiries; Review of configurations, if needed; Review of the processes, if needed. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Complete integrated tests. 	2h		Pilot Users

Unit REQ06 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer will have shown the necessary knowledge and skills to complete requisitions in maestro *.	<ul style="list-style-type: none"> Validate learnings; Review the security settings applied to the module. 	<ul style="list-style-type: none"> Preparation of the next training lessons. 	30 min.	Acquired competencies form - REQ ^I	Pilot

^IThis training document is under development.