

Purchasing Tutorial Prototype Design Summary

Target Audience

This tutorial is designed for adult employees of a business who are new to Purchasing processes. It is expected that these employees know how to use a computer but may be unfamiliar with business processes.

Objectives

After completing this tutorial, learners will be able to:

- Identify the five phases of the Purchasing process.
- Explain the difference between a purchase requisition and a purchase order.
- Explain the difference between the approvals required to request, order, and pay for items.
- Identify the forms and documents used in the Purchasing process.

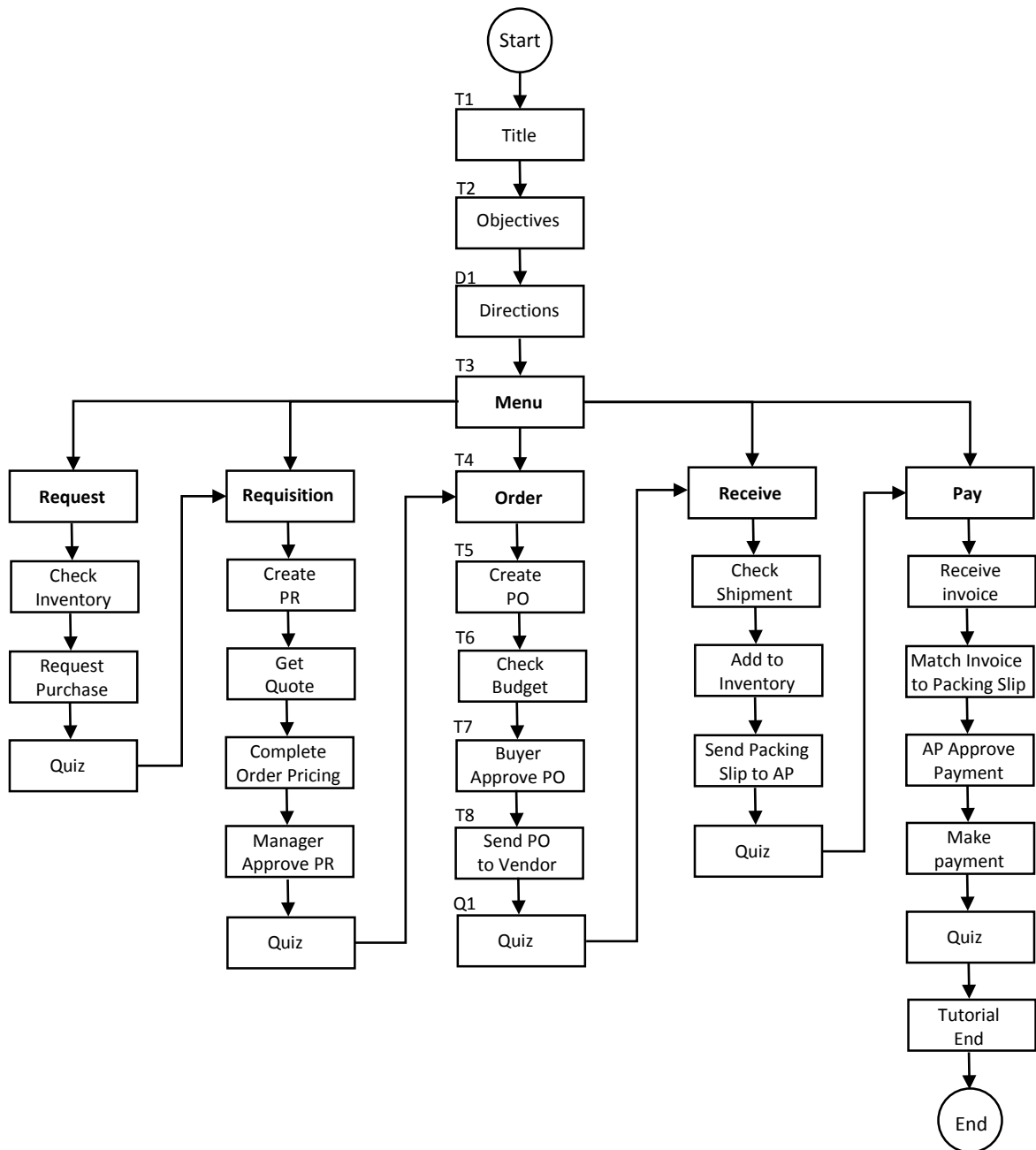
Assessment

Learners will be assessed by taking a short quiz at the end of every topic in the tutorial. The quiz will provide feedback to indicate whether or not the learner answered questions correctly and will provide an analysis of the percentage of questions answered correctly. Learners can review information learned and re-take quizzes as often as they like.

Instructional Value

After the initial costs of developing the tutorial, it will run at minimal cost by any learner who needs to access the tutorial. The tutorial is self-paced and can be run on any day, at any hour. The tutorial can be published to run as a Web application or as a standalone application on desktop computers. The tutorial is designed to be quickly read with coordinating graphics to convey ideas and concepts. The quizzes are designed to provide instant feedback and to allow the learner to go back and review misunderstood concepts.

Purchasing Process Tutorial Structure



Purchasing Tutorial

ManWithBoxes.png

Learn about the basic
purchasing process
used in business

Your Name:

Click **Next** to start this tutorial

Next

Formatting

Title text: Sans serif, 48 pt, blue.

Display text: Sans serif, 24 pt, black.

Instruction text ("Click **Next** to..."): Sans serif, 14 pt,, red. Display 3 seconds after slide appears.

Navigation

Next to Board T2.

Graphics/Media

ManWithBoxes.png: Insert this or similar picture here to show an order being received.

All graphics suggested for this tutorial are provided with this set of storyboards.

See **Notes** below for global format requirements.

Notes:

For entire tutorial, background should be white or a very pale pastel, perhaps with a slight texture. All instances of "red" are RGB 155-45-42, "blue" are RGB 23-55-94, and "light gray" are 242-242-242. Ornamental graphics along the sides or corners are left to developer's discretion but, if used, the ornamentation must coordinate with the specified red and blue colors and the styling must be consistent with a presentation for a business audience. No sound or narration to be implemented for this prototype. Navigation buttons (Next, Back, Home, etc.) are 3-dimensional blue with light gray text. Use a wipe transition (left to right) when opening each page.

Objectives

By the end of this tutorial, you will be able to:

- Identify the five phases of the purchasing process.
- Explain the difference between a purchase requisition and a purchase order.
- Understand the approvals required to request, order, and pay for items.
- Identify the forms and documents used in the purchasing process.

[Exit](#)[Help](#)[Home](#)[Back](#)[Next](#)

Formatting

Title text: Sans serif, 40pt, blue.

Display text: Sans serif, 20pt, black.

Navigation

Next to Board D1.

Back to Board T1.

Home to Board T1.

Help to Board D1.

Exit is inactive for this prototype.

Graphics/Media

Notes:

Display the first objective 2 seconds after the slide appears. Display each bullet point 2 seconds after the previous bullet point.

Directions

- This tutorial is divided into five topics, one for each phase of the Purchasing process.
- Choose a topic from the Menu on the next page.
- After you review a topic, take a short quiz before reviewing another topic.
- Click buttons from any page to navigate:
 - Exit** to end the tutorial.
 - Help** to return to this page.
 - Home** to return to the first page of this tutorial.
 - Back** to go to the previous page.
 - Next** to go to the next page.

Exit

Help

Home

Back

Next

Formatting

Title text: Sans serif, 40pt, blue.

Display text: Sans serif, 20pt, black.

Button names in text should be **bold** font.

Navigation

Next to Board T3.

Back to Board T2.

Home to Board T1.

Help is inactive on this slide.

Exit is inactive for this prototype.

Graphics/Media

Notes:

Display the first objective 2 seconds after the slide appears. Display each bullet point 2 seconds after the previous bullet point. The descriptions of the navigation buttons should appear at the same time as the corresponding bullet. If the learner clicks the Help button on this page, display a message in red text explaining that the page is currently displayed.

Menu

Click the Menu buttons below to learn about each Purchasing process phase.

Request

Needed items are identified.

Requisition

Requisition is created, priced, and approved.

Order

Order is created, checked, approved, and sent to vendor.

Receive

Items are received and verified.

Pay

Invoice is verified, approved, and paid.

Exit

Help

Home

Back

Next

Formatting

Title text: Sans serif, 40pt, blue.

Display text: Sans serif, 18pt, black.

Navigation

Next to Board T4 for this prototype.

Back to Board D1.

Home to Board T1.

Help to Board D1.

Exit is inactive for this prototype.

Purchase to T4.

Request, Requisition, Receive, and Pay are inactive for this prototype

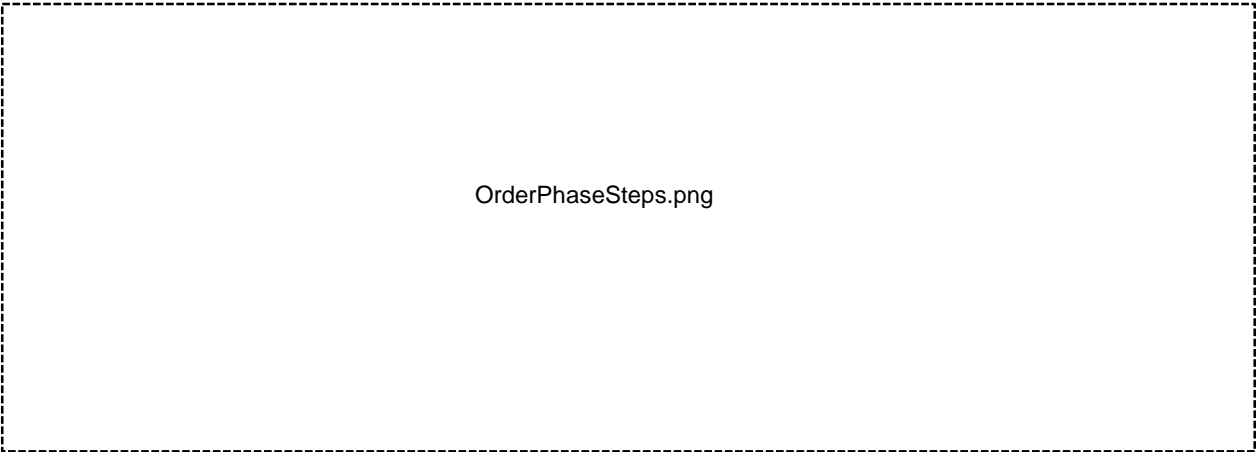
Graphics/Media

Menu buttons should be 3-dimensional and red. Text on buttons should be light gray.

Notes:
Display all buttons and text as soon as slide appears.

Order

The Order phase of the Purchasing process is handled by the Purchasing Department after an approved Purchase Requisition is received. The Order phase ends when a completed Purchase Order is sent to the Vendor.



Exit

Help

Home

Back

Next

Formatting

Title text: Sans serif, 40pt, blue.

Display text: Sans serif, 18pt, black.

Navigation

Next to Board T5.
Back to Board T3.
Home to Board T1.
Help to Board D1.
Exit is inactive for this prototype.

Graphics/Media

OrderPhaseSteps.png: Insert this or similar graphic here to show the sequence of steps in the Order phase.

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Notes:

Display graphic 2 seconds after slide displays. If possible, progressively display the graphic from left to right using a wipe effect.

Purchase Order

- A Purchase Order (PO) is a document that specifies the details of an order:
 - Items to purchase, quantities, and quoted prices.
 - Instructions such as where to mail the invoice and to whose attention.
 - Terms such as when payment is due and percentage discounts if paid early.
- A PO is a written document that becomes a contract between the buyer and the seller.
- The Purchasing Department generates the PO, starting with information from the Purchase Requisition.

PurchaseOrder.png

Formatting

Title text: Sans serif, 32pt, blue.

Display text: Sans serif, 18pt, black.

Navigation

Next to Board T6.

Back to Board T4.

Home to Board T1.

Help to Board D1.

Exit is inactive for this prototype.

Graphics/Media

PurchaseOrder.png: Insert this or similar picture to convey the idea of an order.

Exit

Help

Home

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Next

Notes:

Budget Check

- The Purchasing Department forwards the PO to the Finance Department.
- The Finance Department checks to see if funds are available to pay for the order.
- Depending on the need for the items ordered, the Finance Department may need to transfer money between accounts to accommodate the order.
- The Finance Department lets the Purchasing Department know if money is or is not available for the purchase.

Money.png

Formatting

Title text: Sans serif, 32pt, blue.

Display text: Sans serif, 18pt, black.

Navigation

Next to Board T7.

Back to Board T5.

Home to Board T1.

Help to Board D1.

Exit is inactive for this prototype.

Graphics/Media

Money.png: Insert this or similar picture to convey the idea of money.

Exit

Help

Home

Back

Next

Notes:

Buyer Approval

- A final check is made to ensure all information on the PO is correct.
- If funds are available for the order, the Purchasing Department approves the PO.
- The person who signs the PO is known as the “buyer.”



Formatting

Title text: Sans serif, 32pt, blue.

Display text: Sans serif, 18pt, black.

Navigation

Next to Board T8.

Back to Board T6.

Home to Board T1.

Help to Board D1.

Exit is inactive for this prototype.

Graphics/Media

Signature.png: Insert this or similar picture to convey the idea of signature approval.

Exit

Help

Home

Back

Next

Notes:

Forward to Vendor

- POs can be forwarded electronically to vendors, if the Buyer has a valid electronic signature.
- POs can also be printed and mailed to the Vendor.

Mailbox.png

Formatting

Title text: Sans serif, 32pt, blue.

Display text: Sans serif, 18pt, black.

Navigation

Next to Board Q1.

Back to Board T7.

Home to Board T1.

Help to Board D1.

Exit is inactive for this prototype.

Graphics/Media

Mailbox.png: Insert this or similar picture to convey the idea of mailing something.

Exit

Help

Home

Back

Next

Notes:

Order Phase Quiz

Test your knowledge of the Purchasing process Order phase.

Which document specifies the items to purchase, payment terms, and invoicing instructions?

- A. Invoice
- B. Packing Slip
- C. Purchase Order
- D. Purchase Requisition

[Exit](#)[Help](#)[Home](#)[Back](#)[Next](#)

Formatting

Title text: Sans serif, 32pt, blue.

Display text: Sans serif, 18pt, black.

Navigation

Next is inactive for this prototype.

Back to Board T8.

Home to Board T1.

Help to Board D1.

Exit is inactive for this prototype.

Graphics/Media

Notes:

This quiz question is multiple choice. Allow learner to click or select their answer. The correct answer is C, Purchase Order.