Issue

3

SCATERS PURCHASING

System User Guide

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System User Guide

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Version

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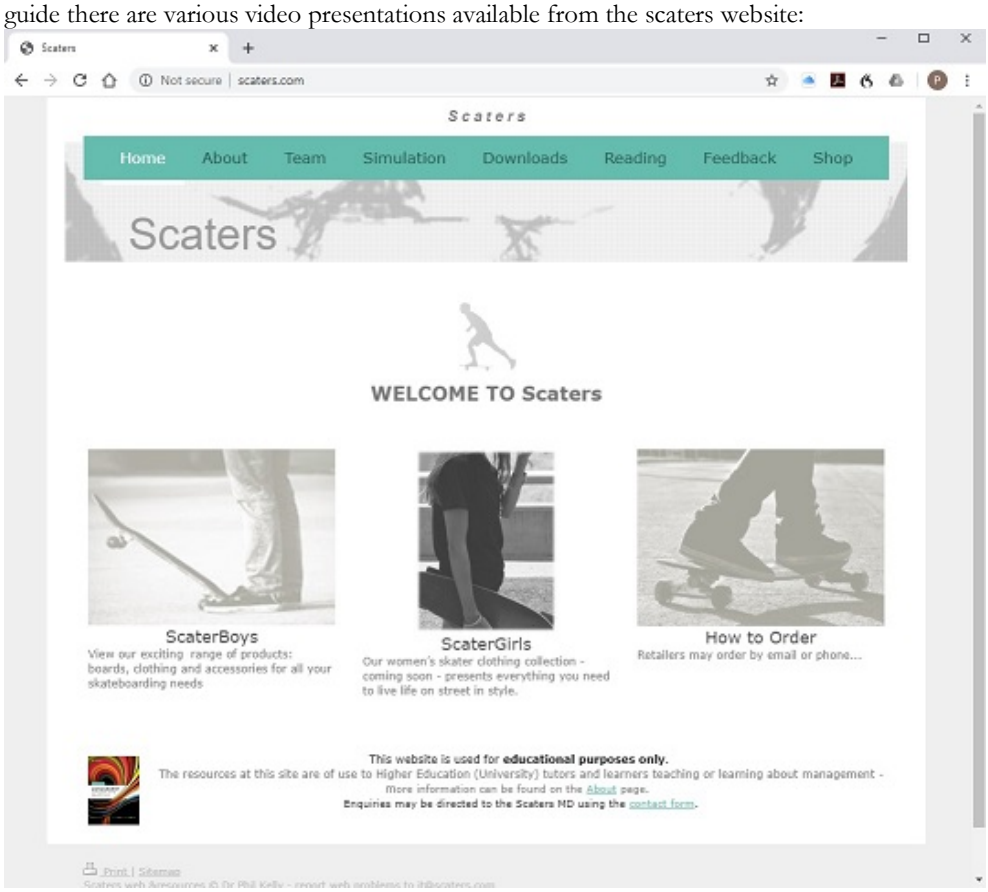
This user guide is for Scaters employees with a responsibility for purchasing. Aside from this user guide there are various video presentations available from the scaters website:



Presentation	Comments	Link
Simulation Briefing	Watch this (5 minute) video first to learn about the simulation	https://www.scaterboys.com/simulation/briefing/
Downloads	Learn how to download and configure the software by watching the five minute video.	https://www.scaterboys.com/downloads/
Scater's Sales Manager role	This film will show you how to use the Scaters system if you have been allocated the sales manager role.	https://www.scaterboys.com/team/sales/
Management team roles	View the video user guide by clicking on your role	https://www.scaterboys.com/team/
Help	The (<5min) video presentation shown will explain how to use the help facility	https://www.scaterboys.com/simulation/help-during-the-simulation/
Ending stage 1	You can watch the following video which explains what to do when stage 1 of the simulation comes to an end. The video also discusses how to start stage 2.	https://www.scaterboys.com/simulation/stage-1/ending-stage-1/
Learn from the simulation experience	Watch this 25 minute video to learn how to reflect on your Scater's experiences	https://www.scaterboys.com/simulation/learning-from-the-simulation/

Table 1 Table of video presentations

Logging in

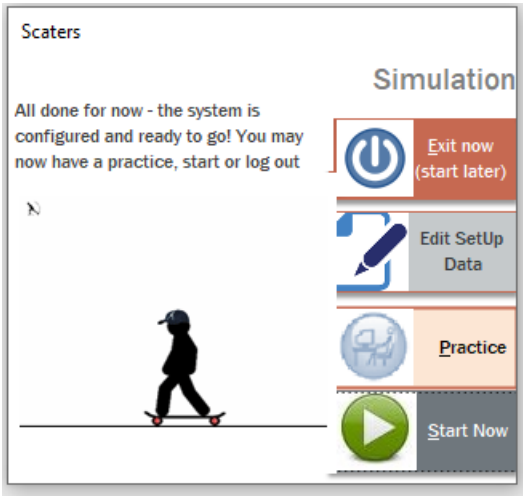


Figure 1 Start screen

You must first launch the Scaters application by double clicking on it. You should only need to do this once at the start of the simulation.
Once you click the "Start" button, see Figure 1 Start screen, the log-in screen will appear.

Each user should take turns to log-in when they have a task to perform. Simply click the drop down to select the relevant employee. The Home form, discussed next will then load.

Home form

This is your main form.

When you log in the Home form will load.

Use this form to navigate to everything you need.

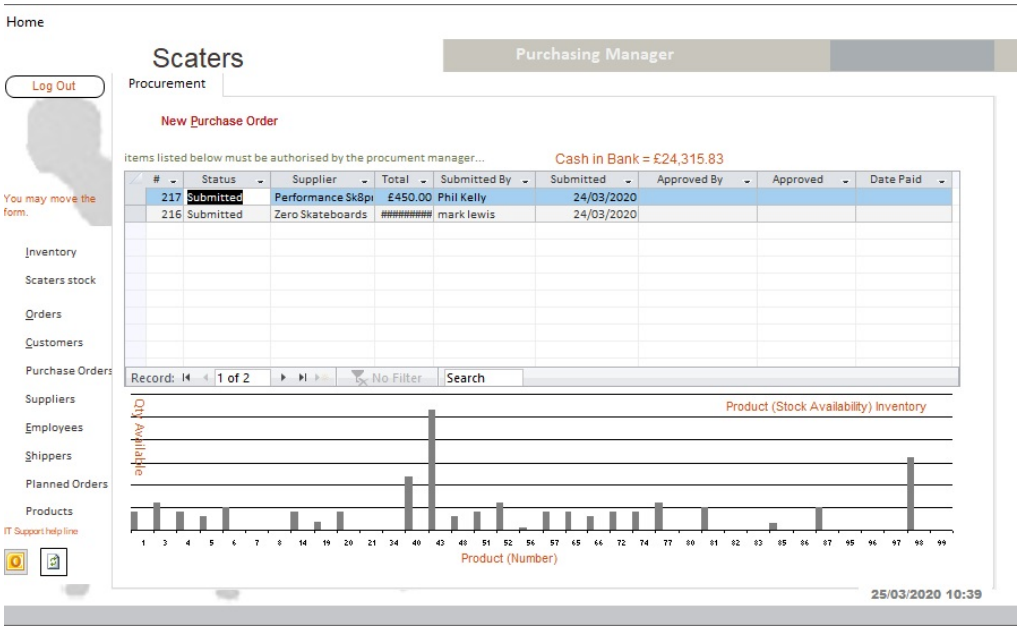


Figure 2 Home form

The home form shows any Purchase Orders waiting to be authorized and the quantities of product in the warehouse (chart below PO table on home form)

When you close the Home form (by clicking the "Log out" button in the top left corner, the Log-in form will reload for the next user.

New Purchase Order (PO)

When Scaters places an order (normally by sending a purchase order PO) with a supplier you must open a new purchase order and enter the PO data.

Note

Sales and other staff can raise a PO but cannot authorize it in stage 1 of the simulation

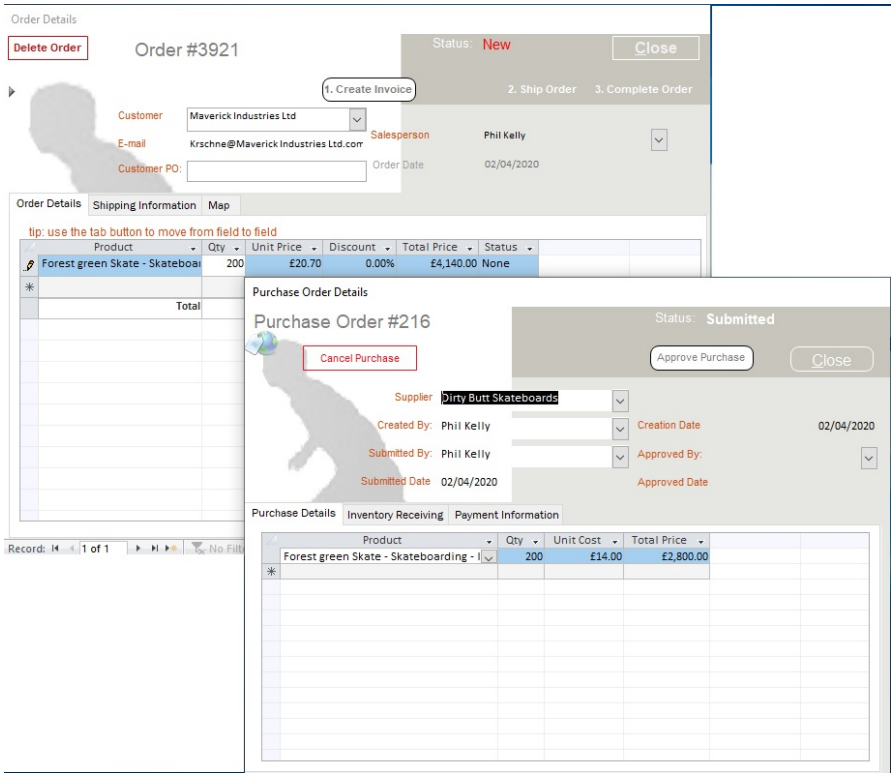


Figure 3 Purchase Order (From sale)

Use the tab to move from field to field after you enter a product
Enter the quantity
Some fields will be automatically populated

What next.

Submitted POs must be authorized

The warehouse will receive the inbound goods sometime later.

Approving POs

Submitted POs will be listed on the Home (procurement) form until authorized.

Double click the relevant PO to authorise.

Click the "Approve Purchase" at the top of the form (menu)

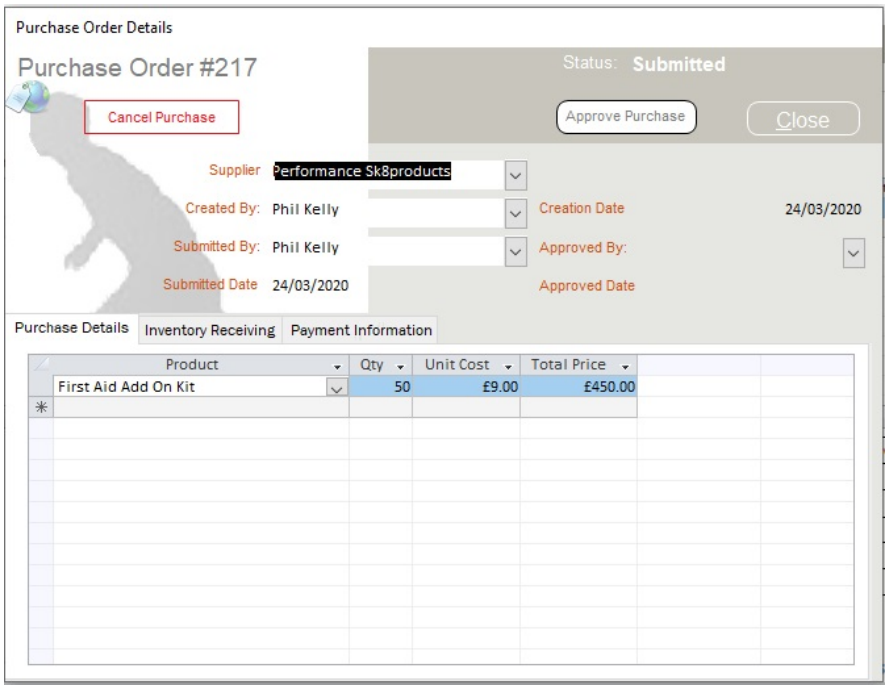


Figure 4 PO approval

An approval form will load:

You will be given an option to fast track delivery, possibly at an extra shipping cost.

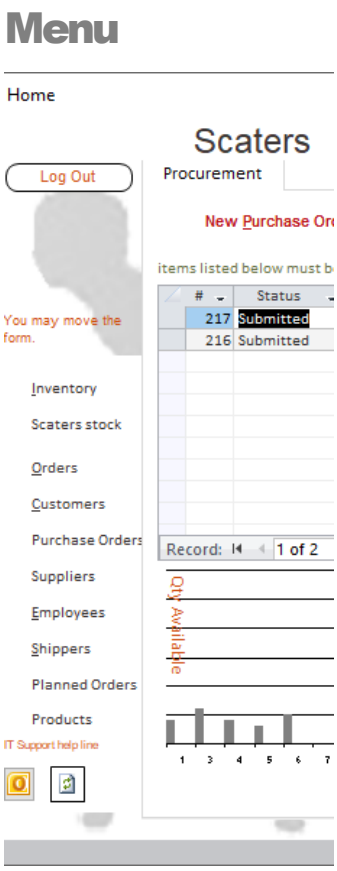


Figure 5 Home form menu

From the menu bar you can:

1. Manage Inventory
2. View all **Purchase Orders** (open or closed and from all employees)
3. View **Suppliers**
4. Open Scaters **Outlook**

   Emails will periodically drop in but you may wish to either check for new emails yourself or re-open old mail.

5. Check stock levels using **Inventory**

It's the purchasing manager's job to order stock and authorize purchase order.

Inventory Management (Ordering Direct goods)

The purchasing manager may choose to control stock levels in the warehouse.
Click on the word "Inventory" on the home form menu bar to open the inventory list, see Figure 6 Inventory List

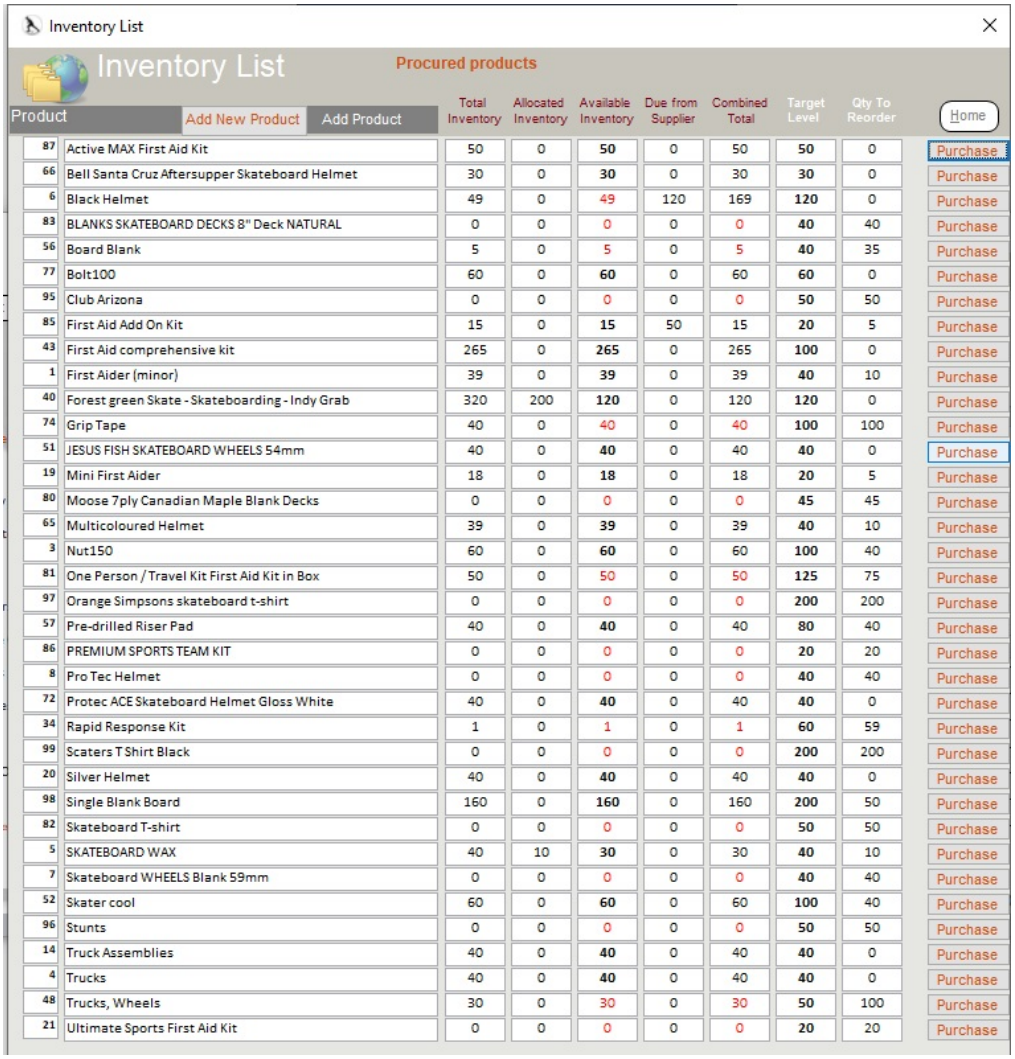


Figure 6 Inventory List

All Scaters procured products are shown in the list. You will also see:

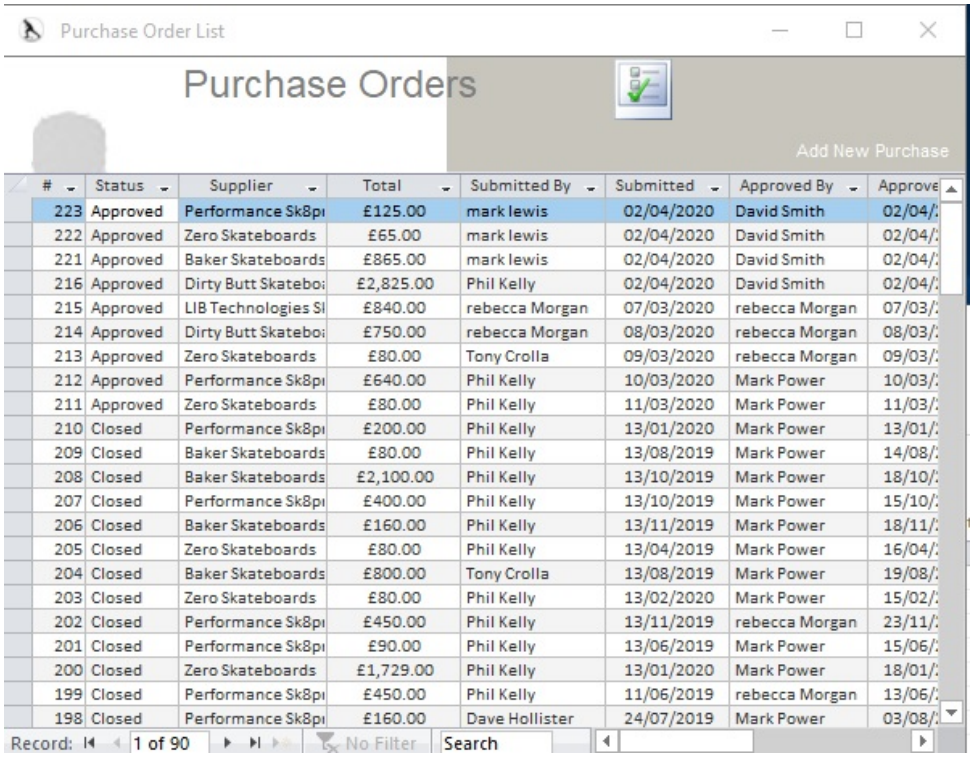
- The Total inventory
- Allocated Inventory
- Available inventory
- Stock due from a supplier
- Combined total (Available + Due)
- Target level, and
- Quantity to reorder (reorder level – set on the product details form)

You may consider ordering products where the "Qty to Reorder" > 0.
You do this simply by clicking the respective "Purchase" button.

Note that you will still have to authorize the purchase from the home form afterwards.
Note also that you can add new products (made available by suppliers) to the Scaters portfolio by clicking he "Add New Products" button at the top of the inventory list form.

Purchase Order list

As noted previously, you can view all POs (regardless of employee) by opening the list from the home form menu.



#	Status	Supplier	Total	Submitted By	Submitted	Approved By	Approve
223	Approved	Performance Sk8pı	£125.00	mark lewis	02/04/2020	David Smith	02/04/:
222	Approved	Zero Skateboards	£65.00	mark lewis	02/04/2020	David Smith	02/04/:
221	Approved	Baker Skateboards	£865.00	mark lewis	02/04/2020	David Smith	02/04/:
216	Approved	Dirty Butt Skateboa	£2,825.00	Phil Kelly	02/04/2020	David Smith	02/04/:
215	Approved	LIB Technologies Sl	£840.00	rebecca Morgan	07/03/2020	rebecca Morgan	07/03/:
214	Approved	Dirty Butt Skateboa	£750.00	rebecca Morgan	08/03/2020	rebecca Morgan	08/03/:
213	Approved	Zero Skateboards	£80.00	Tony Crolla	09/03/2020	rebecca Morgan	09/03/:
212	Approved	Performance Sk8pı	£640.00	Phil Kelly	10/03/2020	Mark Power	10/03/:
211	Approved	Zero Skateboards	£80.00	Phil Kelly	11/03/2020	Mark Power	11/03/:
210	Closed	Performance Sk8pı	£200.00	Phil Kelly	13/01/2020	Mark Power	13/01/:
209	Closed	Baker Skateboards	£80.00	Phil Kelly	13/08/2019	Mark Power	14/08/:
208	Closed	Baker Skateboards	£2,100.00	Phil Kelly	13/10/2019	Mark Power	18/10/:
207	Closed	Performance Sk8pı	£400.00	Phil Kelly	13/10/2019	Mark Power	15/10/:
206	Closed	Baker Skateboards	£160.00	Phil Kelly	13/11/2019	Mark Power	18/11/:
205	Closed	Zero Skateboards	£80.00	Phil Kelly	13/04/2019	Mark Power	16/04/:
204	Closed	Baker Skateboards	£800.00	Tony Crolla	13/08/2019	Mark Power	19/08/:
203	Closed	Zero Skateboards	£80.00	Phil Kelly	13/02/2020	Mark Power	15/02/:
202	Closed	Performance Sk8pı	£450.00	Phil Kelly	13/11/2019	rebecca Morgan	23/11/:
201	Closed	Performance Sk8pı	£90.00	Phil Kelly	13/06/2019	Mark Power	15/06/:
200	Closed	Zero Skateboards	£1,729.00	Phil Kelly	13/01/2020	Mark Power	18/01/:
199	Closed	Performance Sk8pı	£450.00	Phil Kelly	11/06/2019	rebecca Morgan	13/06/:
198	Closed	Performance Sk8pı	£160.00	Dave Hollister	24/07/2019	Mark Power	03/08/:

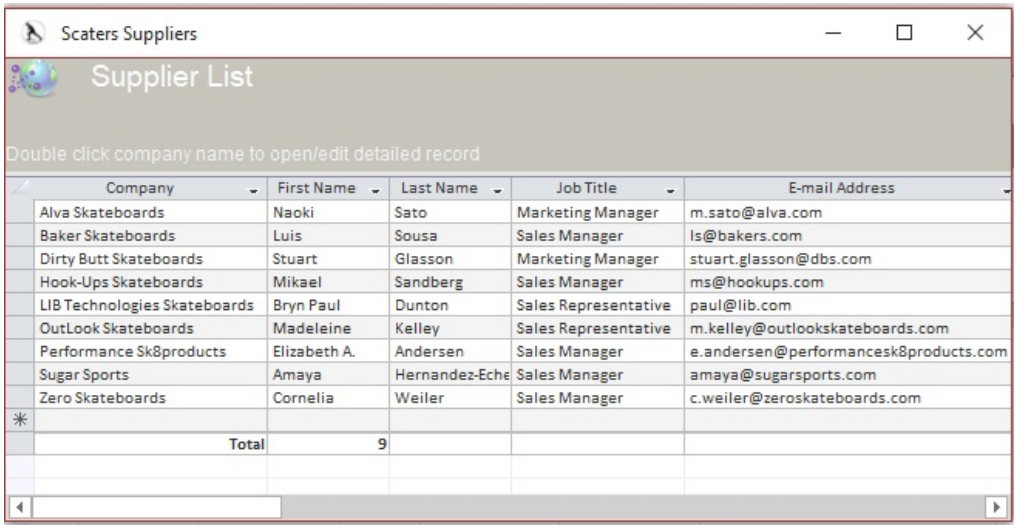
Figure 7 Purchase Order list

From the list (see Figure 7 Purchase Order list) it is possible to view the status of any PO. This functionality can help with customer service but also when you are approaching the end of simulation to ensure all orders have been closed.

You can open a specific order by double clicking on it.

Suppliers

From the home form menu you can access the Supplier list, Figure 8 Supplier list



Company	First Name	Last Name	Job Title	E-mail Address
Alva Skateboards	Naoki	Sato	Marketing Manager	m.sato@alva.com
Baker Skateboards	Luis	Sousa	Sales Manager	ls@bakers.com
Dirty Butt Skateboards	Stuart	Glasson	Marketing Manager	stuart.glasson@dbs.com
Hook-Ups Skateboards	Mikael	Sandberg	Sales Manager	ms@hookups.com
LIB Technologies Skateboards	Bryn Paul	Dunton	Sales Representative	paul@lib.com
OutLook Skateboards	Madeleine	Kelley	Sales Representative	m.kelley@outlookskateboards.com
Performance Sk8products	Elizabeth A.	Andersen	Sales Manager	e.andersen@performancesk8products.com
Sugar Sports	Amaya	Hernandez-Eche	Sales Manager	amaya@sugarsports.com
Zero Skateboards	Cornelia	Weiler	Sales Manager	c.weiler@zeroskateboards.com
Total	9			

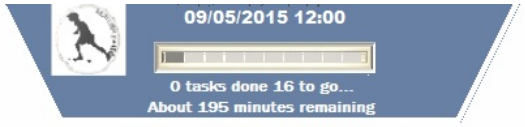
Figure 8 Supplier list

From the list you can (1) edit supplier information and (2) add a new supplier to the Scaters database. Double click on a supplier from the list to open the supplier form. Aside from contact data you can also view the purchase history (past POs placed by Scaters with the supplier). You can also view the products they sell.

Note

Add a new supplier by clicking "New Supplier" at the top of the form (menu)

Advanced Inventory Management



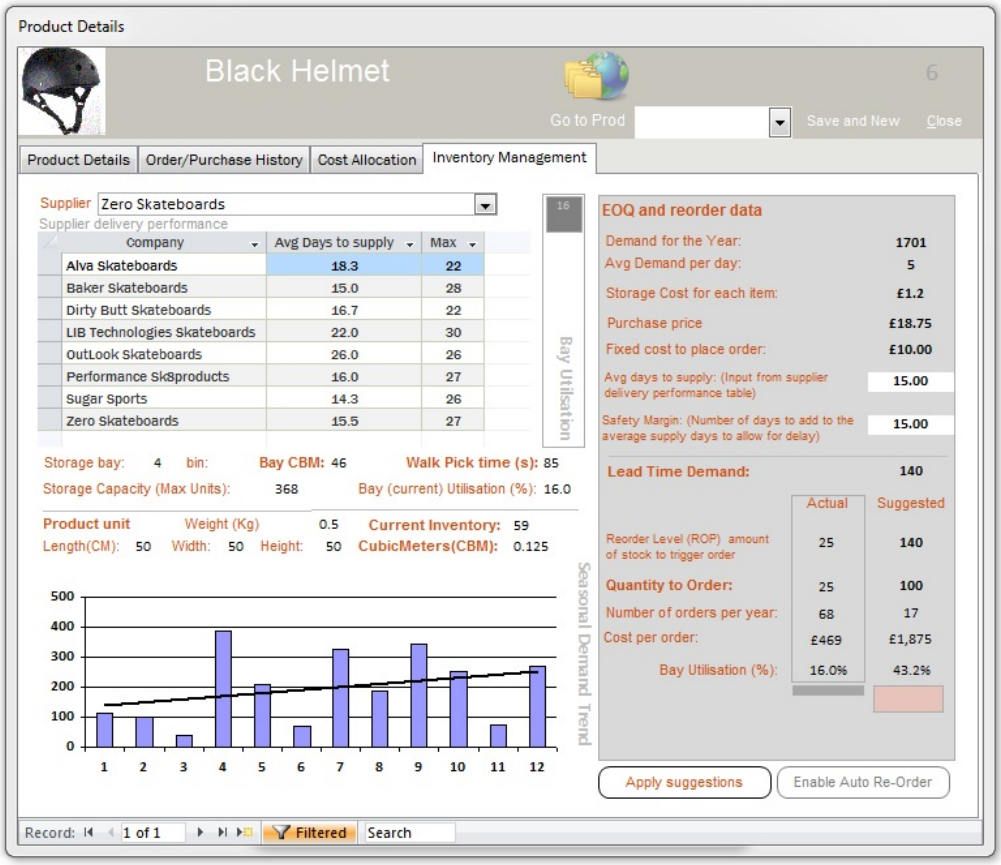


Figure 9 Product Details: Inventory Management

When logged in as the purchasing manager you will be able to see the inventory management tab (Figure 9) of the product details form though you will not be able to apply suggestions until stage 2 begins. The tab shows:

- Supplier delivery performance – the average days it takes a supplier to fulfil an inbound order to Scaters (note the supplier for the displayed product – black helmet – is shown as Zero Skateboards)

- The bay used in the Scaters warehouse for this product, its capacity in cubic meters and the time taken for a picker to collect an item from this bay when they start their journey from the packing location of the warehouse

- The current inventory (59) is shown and because the bay can hold 368 of this product it is 16% utilized.

- Finally, the quantity sold by month (over one year) is shown in the graph which includes a trend line. We can see a trend of product sales increasing as the year progresses.

All of the aforementioned data and information can be used to help determine how much of the item should be stored by Scaters, when to place orders with suppliers and the quantity to order.

In order to derive suggested changes to the management of this item you will need to enter two values: (1) the average days to supply and (2) the amount of safety stock

To determine the average days to supply you must look up the supplier (Zero in this case) on the supplier delivery performance data table (Avg days to supply) as 15.5 (15) and enter this value in the white cell on the right hand side of the form (where it has already been entered in this case).

To determine the safety margin (data to enter into the second white cell) you must look up the second column of the aforementioned table (Max) i.e. 27 and subtract the Avg days to supply. We have rounded this to 15 given a trend of growth in demand.

Having entered the second value press the tab key and the system will calculate relevant fields.

Compare the suggested order quantity with the actual. Consider the cost of the new order and potential impact on cash flow, the storage capacity (i.e. could the bay hold the new quantity), and trends. Consider the impact on stockouts, customer service and supply responsiveness metrics i.e. impact on fulfilment and production performance.

Finally, decide whether to implement the suggestion (based on the EOQ) formula. Critically evaluate the usefulness of the formula in this case – what are the limitations and drawbacks. If you decide the suggestions make sense then click the apply suggestions button.

You could also consider the supplier performance at this stage.

Finally, you may make use of data to influence decisions as to whether this item (Black Helmet in this case) is being stored in the most ideal bay (size and warehouse location).

Emails

From the Home form menu (left) you can access your simulated emails by clicking on the button. This will open the inbox (see below). Any delivered emails will be visible in your inbox. You can wait for emails to arrive on a timer or 'pull' them through by clicking on the send receive button.

Note

This is a simulated version of email and many of the buttons will not function – with the exception of the "send receive" button located in the top left corner and in the ribbon area

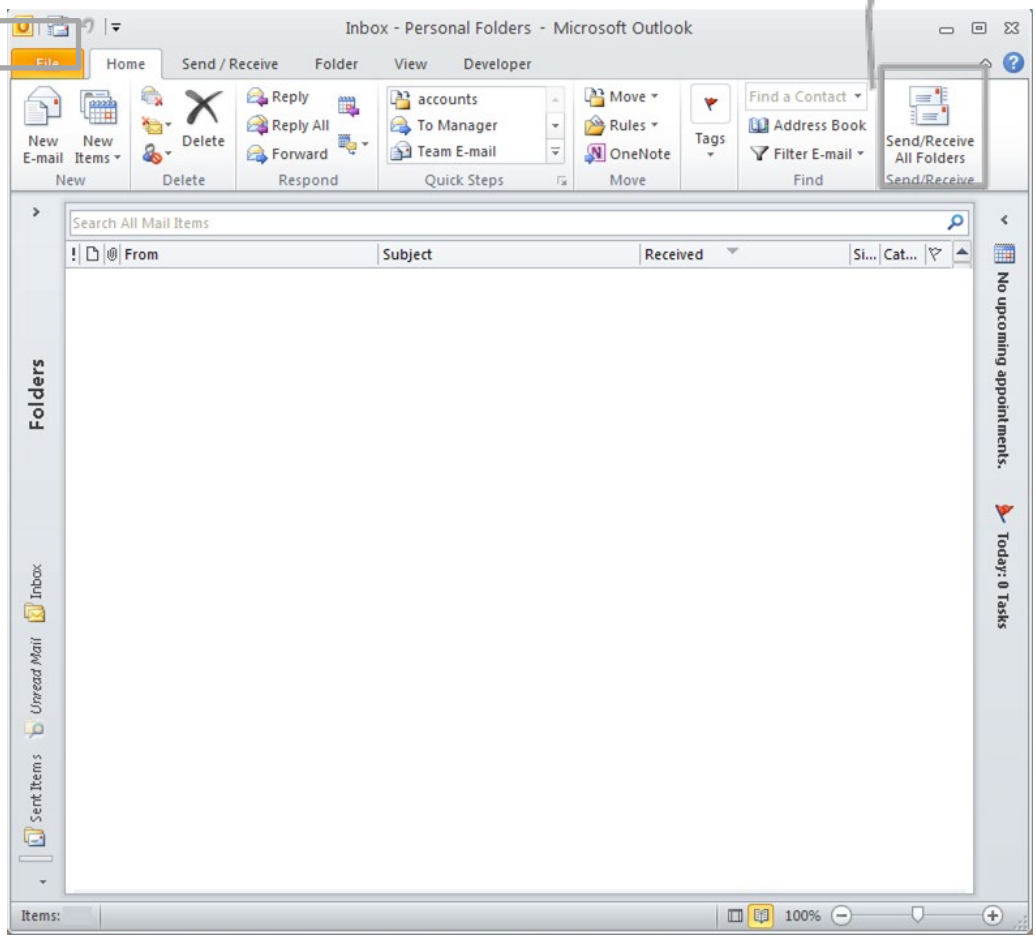


Figure 10 Email inbox

Post Simulation – Analytics

Ending stage 1: You can watch the following video which explains what to do when stage 1 of the simulation comes to an end. The video also discusses how to start stage 2.
https://www.scaterboys.com/simulation/stage-1/ending-stage-1/

In this section we outline a feature that allows you to understand a wide range of activity related to your simulation, a compilation of data and statistics which may be used to analyze and report on the performance of the company. This section concerns the using of existing Scaters company data to gain insights into the company and its operations. For example, the data may be used to benchmark, identify problems, opportunities and strengths. Data can be exported from the application as a series of Excel spreadsheets, through the Analytics form. Data exists for many aspects of the (core) Fulfillment, production and procurement processes and about current employees and their reporting lines (to aid the creation of organization designs/ structure charts). You may extract ALL available data.

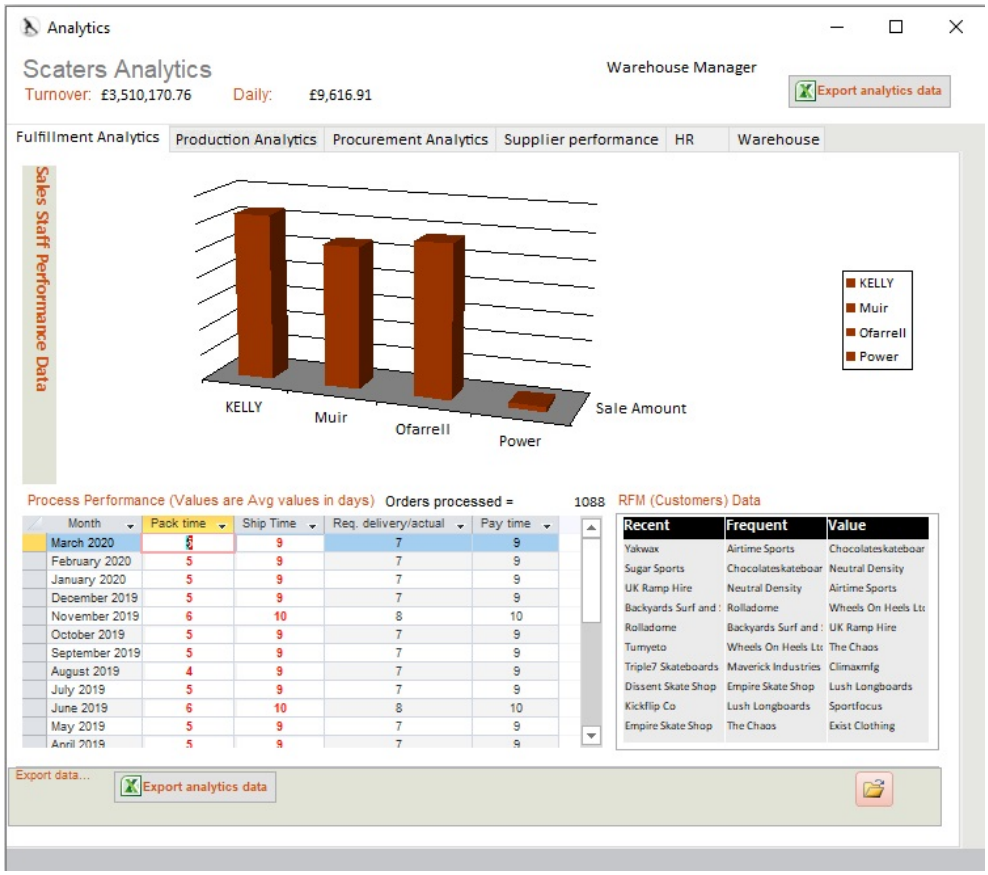


Figure 11 Analytics form

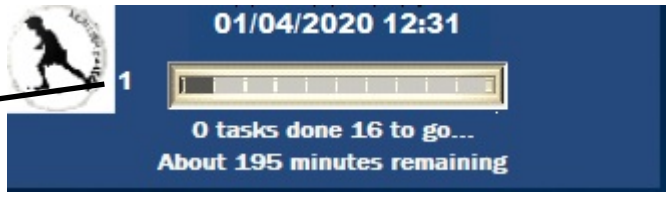
Extracting ALL available data

1. Open the analytics form (from the home form or the simulation end form)
2. Near the top right of the form you will see a shaded box "Export analytics data", simply click this button!
3. The system will then process your request and create the relevant spreadsheet(s) in the preferred location.
4. You may then view and edit the spreadsheets. Consider applying statistical functions to summarize/ analyze the data; compare with benchmark data (see https://www.scaterboys.com/about-1/benchmarks/) etc.

Stage 1 performance

Your performance in stage 1 is judged, in part, by how many times you log-in and out as different roles (sales, warehouse etc) and this is used to indicate if you were aware of the relevant business processes and have an understanding of operations. The log-in count is shown on the Scater's clock. You can reduce your log-in count i.e. improve your performance (and therefore revenue for stage 1) by doing additional tasks. These can be found by clicking the button on the simulation task progress form (see Figure 13).

Help



Performance score – lower the better (aim for <40 by the end of stage 1

Figure 12 Scater's clock

The main help functions are accessible from the Scaters Clock. Click the text "tasks" below the progress bar. This will open a form "Simulation task manager". This form shows the stage 1 tasks you have and have not done. You may also fast track through the simulation by clicking on the buttons at the foot of the form. Clicking the "20%" button will move you on approximately 20% of the simulation – marking the first two simulation tasks as complete. You can use these buttons to automatically progress through the simulation if time is constrained or you do not know what to do or simply want to fast track to the end of stage 1 so that you can access stage 1 data and stage 2. However, use of these buttons will reduce your performance score significantly.

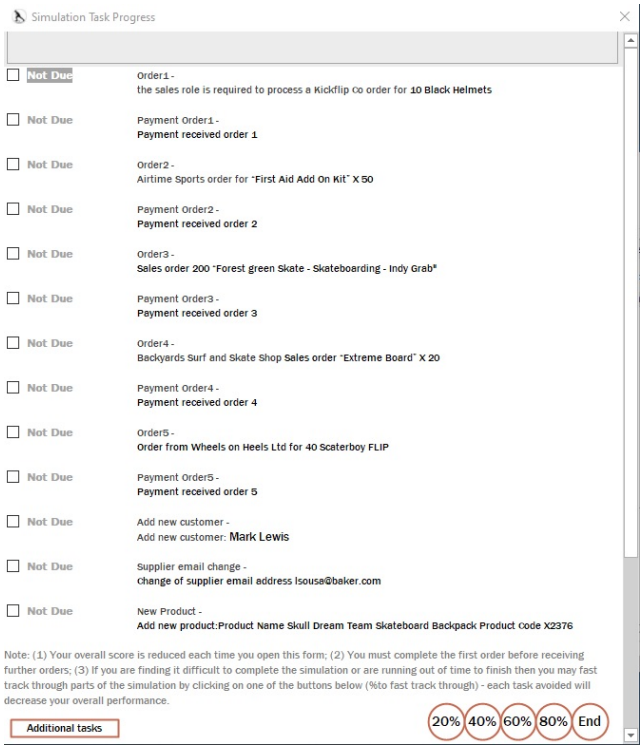


Figure 13 Simulation task progress form

You can watch a video presentation explaining help here: https://www.scaterboys.com/simulation/help-during-the-simulation/

Practice Mode

Practice Mode

The system now comes with a practice mode.
Anything you do in practice mode will NOT affect the main simulation.
It therefore presents an opportunity for you to learn how to use the system.
In this section we describe how to use the system in practice mode.

Practice mode may be selected before you start the simulation.

The start screen (see Figure 1 Start screen) will appear once you have configured the system for your group.
Upon clicking the 'Practice' button you will be given the opportunity to print a set of user guides if you have not done so already.

Next, the practice mode menu bar will load:

Figure 14 Practice mode menu bar

Pre-programmed practices

In this mode you can select up to 4 preset practice scenarios:

1. Simple (Sales) order
2. Sales (resale item) order plus Purchase Order
3. Sales (manufactured item) order

Start the session by clicking the green 'play' button in the menu bar.

Next, select the preferred adjacent preset practice button.

You will then be informed of a scenario e.g. an order has just been placed by…

Details of the practice scenario will be shown in the text box located around the middle of the practice bar.

The Home form will load in practice mode.

You must then enter details in the correct way to process the order.

Some help is provided in the form of context specific message boxes.

When you have successfully processed the order, the home form will close, returning you to the practice mode menu bar.

You may then select another preset practice or redo a practice scenario already attempted. You can attempt the practices as many times as you like. Records are deleted when you finish.

Spontaneous practice

It is also possible for you to determine your own practice scenarios enabling you to freely interact with the system.

In order to enter this mode you should simply click on the padlock button which will launch the home form in practice mode. As with the pre-programmed practices, all records will be deleted when you exit this mode.

Returning to the simulation

When you have finished practicing you may return to the simulation start screen (as shown in **Error! Reference source not found.**) by clicking the button 'Start Simulation'

A2

Stage Two (Management)

Stage 2

In some cases your tutor will ask you to complete certain tasks associated with stage 2 (*Management stage*).

The main purpose of stage 2 will be to either (1) provide a context for identifying and selecting areas of business improvement Or (2) to practice tactical and strategic management decision making.

In the case of the first objective, you will be provided with data such as sales forecasts etc. enabling the immediate creation of a master budget for Scaters. This will then act as a context for investment and improvement decisions.

Having gained experience of the Scaters company and core processes you are now well placed to apply management theory to practice and determine where you may make the company more efficient and effective. Decisions about improvements are investment decisions and need to be made in the context of available capital and strategic priorities and targets/ goals.

Stage 2 (automatically) follows on from stage 1.
Whereas stage 1 enables users to gain familiarity with operations (executing core business processes), stage 2 is more about Managing for improvement and the attainment of goals.

The task requirements of stage two will vary from course to course and will be predetermined by your tutor. Examples of stage 2 tasks include: (1) strategic tasks: environmental analysis (PESTLE, SWOT etc.), target and goal setting and the identification of improvement projects. In some cases you may be required to conduct investment appraisal of such projects; and (2) Budget tasks: forecasting sales, expenses and labour costs.

You may also be allocated a specific (individual) role such as secretary, budget or strategic and may be given a department to manage (specifying the departmental mission and goals etc.).

Finally, you may be informed of a Budget date and possibly an MD presentation date.

The main outcomes of stage 2 are as follows:

1. Creation of a master budget for Scaters
   this provides a context for investment decisions
2. Presentation (verbally and/or in writing) to the MD of ideas to improve the company.

In this section of the user guide we explain how stage two data is generated, analysis and projects entered and the master budget prepared and printed.

Ending stage 1

Upon completion of all (required) simulation tasks, stage 1 will end. A message box will automatically inform the user of this. Stage 1 represents a year of trading. During the first year of your simulation the company turnover is set around £3M. The second year of simulation witnesses growth and a turnover of around £5M. Consequently, at the end of stage 1 the system must generate orders to reflect the next year (£5M). After the message box informing you that the simulation (stage 1) is ending a data processing form will load as shown in the figure below.

Figure 15 Data Processing (stage 1 end)

Data processing will take several minutes so please be patient!
Do not worry if there are short periods (2-3 mins) of apparent inactivity – this is normal. When processing is complete the title text will change to 'Finished' and a button will become visible to move on. Click the button to proceed. The simulation (stage 1) end screen will then load as shown in Figure 16.

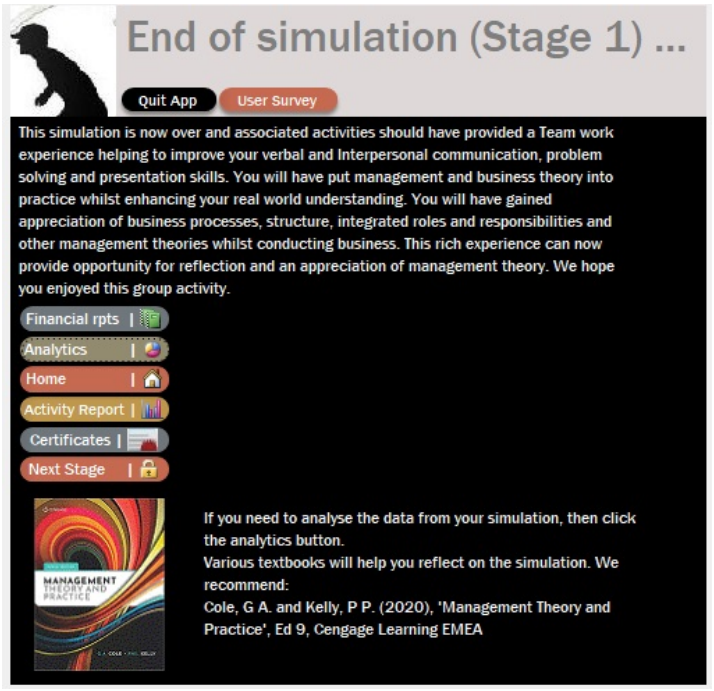


Figure 16 Stage (1) end screen/ form

Shortly after this form has loaded the system may load details of your assessment and may email various documents to your tutor. Before moving into stage 2 you may wish to explore the analytics (refer back to Figure 11 Analytics form). YOU SHOULD THEN ONLY CLICK THE 'NEXT STAGE' BUTTON IF TOLD TO DO SO BY YOUR TUTOR.

Entering stage 2

Upon clicking the 'Next Stage' button a 'Scaters Stage 2 Briefing for Students' document will load. This document explains what your tutor (and the Scaters MD!) is expecting you (and your group) to do next.

The main form for stage 2 (Scaters Manager) as shown below then loads.

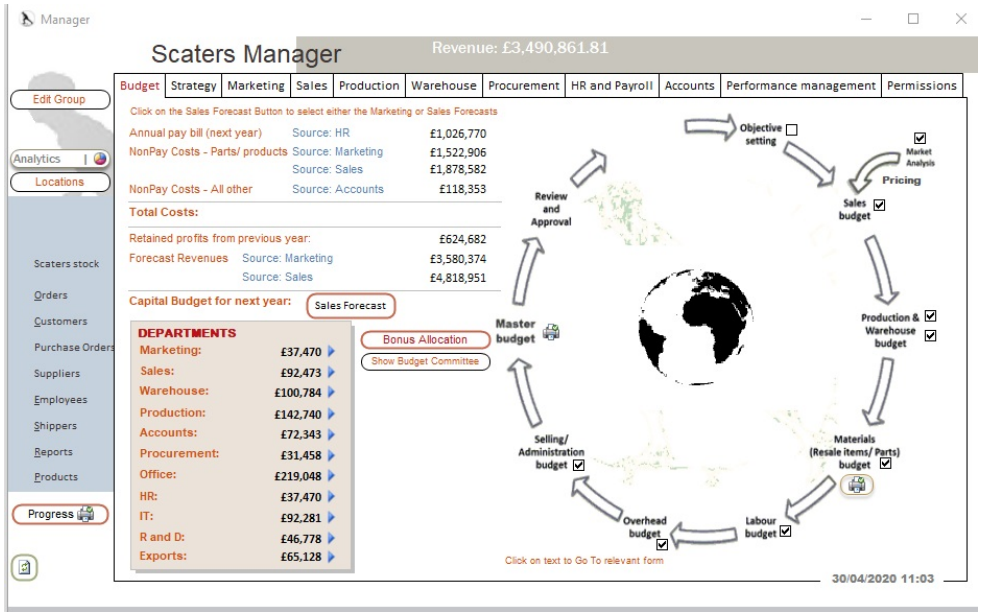


Figure 17 Manager form (stage 2)

As discussed earlier, dependent upon how your tutor has configured the simulation you may or may not be required to enter data in different parts of this form. The data will already be present if you are not expected to enter data. Similarly, some buttons will have been disabled if you are not required to enter data in certain areas.

Your main tasks will be to

1. Assure the correct data is in place (reviewing/ populating the form)
2. Add ideas for improvements (strategic projects/ capital investments)
3. Print a master budget
4. Prepare for meetings, presentations or report writing tasks

Each of the main tasks will be outlined next.

Reviewing/ populating the management form

You should first review the information presented on the various tabs, sub and main form.

Next, if appropriate, review the aforementioned 'Scaters Stage 2 Briefing for Students' and identify tasks where you may need to populate the form.

You may be asked to populate data on the strategy forms or by a specific business function such as sales etc. Each will be considered next.

If you are unable to enter data in parts of the Scater's Manager form then you may not have been given the appropriate permission – check with your tutor if you are completing the simulation under their guidance. If you are completing the simulation independently then click the permissions tab of the manager form and then click the button "Unlock All" – this will give you permission to edit data on the Manager form.

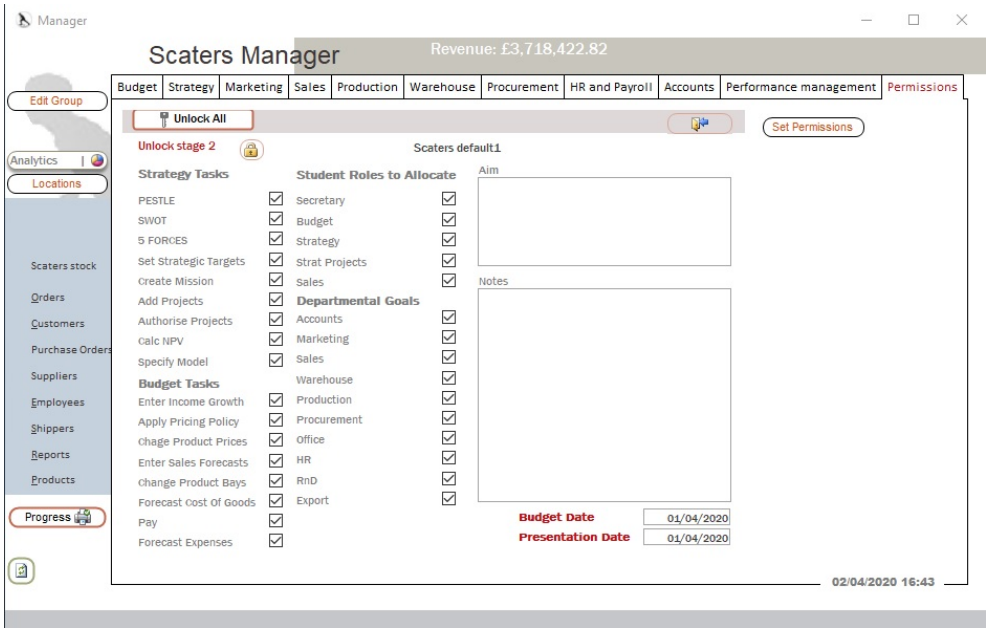


Figure 18 Manager privileges

By Function e.g. Sales

The budget process (see later) involves forecasting, setting goals and conducting analysis, prior to investment decision making. The company needs to estimate income and costs.

Scaters management will need to know how much revenue it is expected to generate in the forthcoming year. Either the marketing or sales (or both departments) contribute to such forecasts.

There is a need to estimate price changes and the number of sales. This can either be done at a high level (marketing) or on a detailed product by product basis (sales forecast).

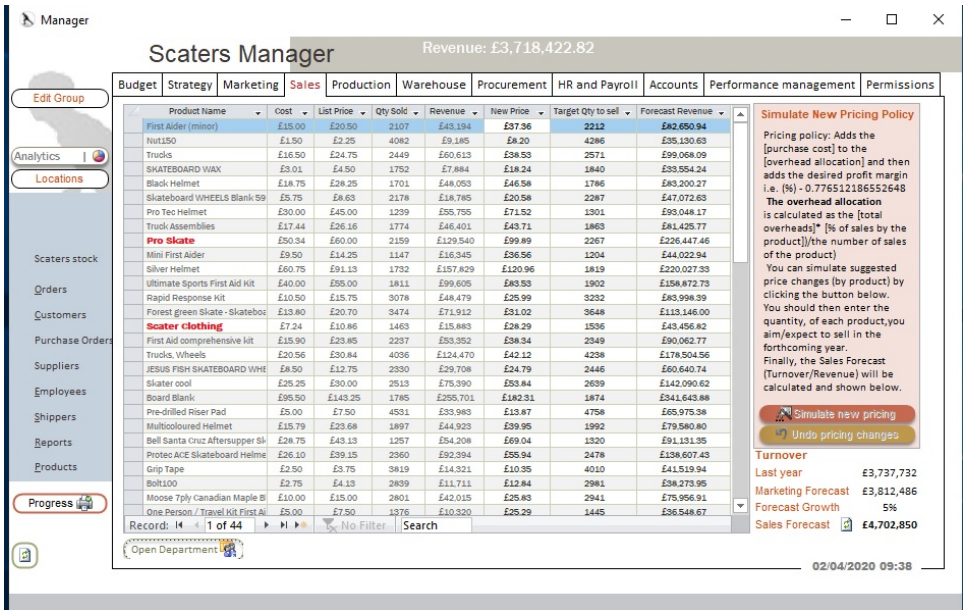


Figure 19 Manager form: Sales tab

The sales forecast data is entered on the manager form sales tab as shown in Figure 19.

If required to do so you may enter the new price and target quantity to sell directly into the form – for each product. Alternatively you can, based on entered assumptions, automatically enter new pricing and quantity data by clicking the 'simulate new pricing' button.

A similar approach is taken for other business functions.

You may also be required to enter various assumptions on a defaults form for a given department – see Figure 20.

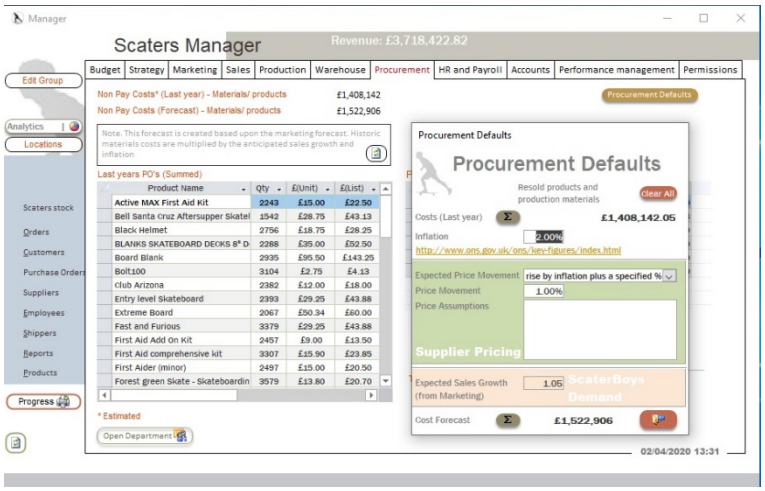


Figure 20 Defaults

If the relevant defaults button has been disabled you are not expected to enter this data.

Finally, if your role includes managing a specific department you may be asked to complete tasks such as writing a departmental mission statement, objectives and so on. You can view/enter such data on the departmental form, see Figure 21.

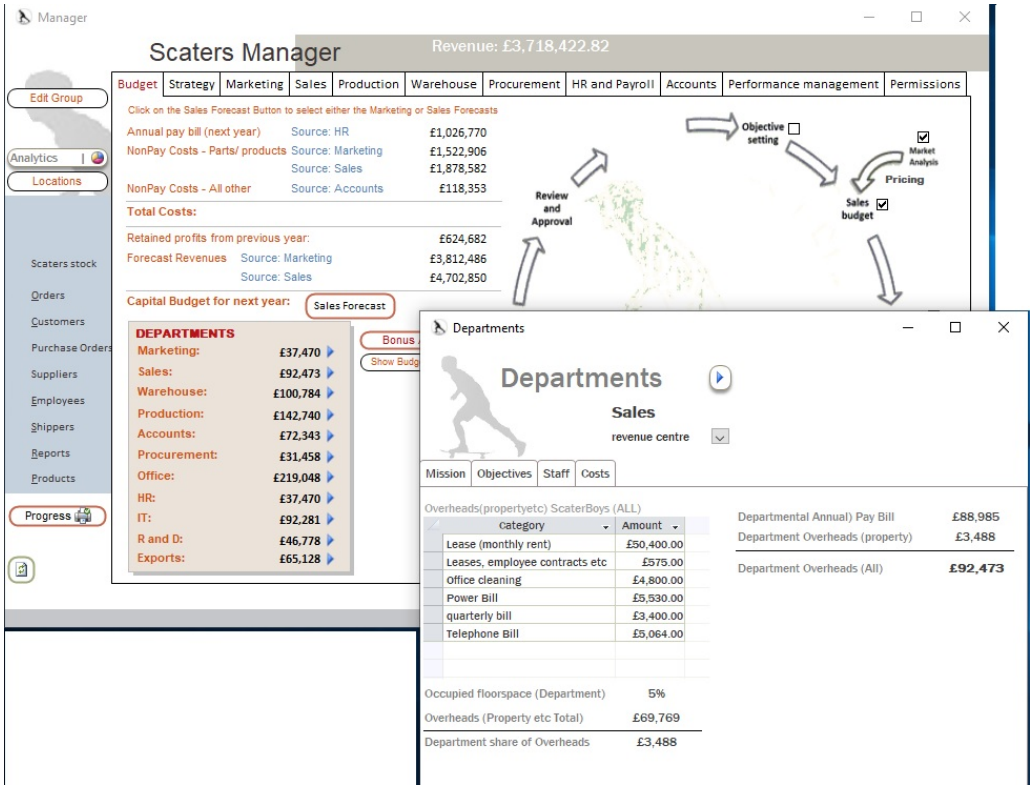


Figure 21 Departmental data

Aside from considering departmental data you may also enter/view strategic data on the strategy tab of the manager form.

Strategy

There are several tabs on the strategy sub form (Analysis, Targets etc.).
Empty boxes (fields) should be populated if enabled.
Use the information on Scaters strategy to provide a context for improvement project investment.

Strategic projects

The strategic projects tab shows a list of strategic (capital) investment opportunities identified by the management team. Projects aim to assure strategic goals are accomplished. They represent major areas for improvement (arising from a commitment of resources in the future).

Based upon your experiences in stage 1 and your reading of management theory to date you may be expected to identify improvement opportunities. Significant changes (improvement initiatives) will normally be managed as a strategic project (see examples).
If required to do so, you can add your ideas for improvement projects by clicking the 'Add New Project' button on the tab.

This will launch the strategic projects form which should then be populated by you and your group.

Strategic projects typically have future cash flows associated with them i.e. costs and benefits may be incurred and witnessed over more than one year. Consequently, you may be required to appraise the investment using a technique like NPV.

There is a function to help you estimate this. Simply enter your forecast of costs and income over the next 4 years and then the NPV (using a 10% cost of capital) will be calculated. The NPV should then be copied and pasted into the 'Benefit' field of the strategic projects form.

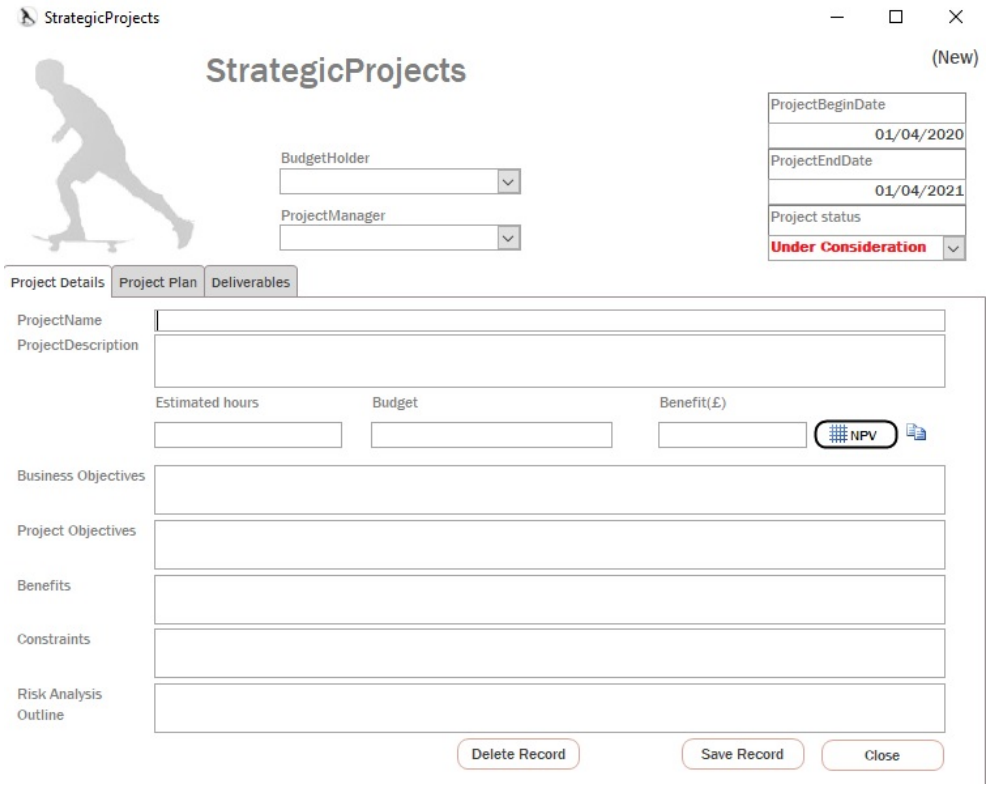


Figure 22 Strategic projects

Strategic spend

The next tab along (strategic spend) identifies those projects that have been authorized (by the MD) – their aggregated cost and benefit.

You will normally introduce ideas for strategic spend (projects) at the budget meeting and may be asked to present them in detail to the MD.

You should consider how the investment will be funded.

In order to self-fund new investment/ improvement initiatives Scaters must formulate a budget. The process by which it does this is discussed next.

The budget process

In the broadest sense, a budget is an allocation of money for some purpose. Budgeting has always been part of the activities of any business organization of any size. Scaters is no exception. The Scaters budget not only limits expenditures; it also predicts income, profits, and returns on investment a year ahead.

Budgeting in Scaters is a collective process in which operating units (functions) prepare their plans in conformity with Scaters goals. Each unit plan is intended to contribute to the achievement of the Scaters goals. Unit managers prepare forecasts of sales, operating costs, overhead costs, and capital requirements. They calculate operating profits and returns on the investment they intend to use. The (master) budget itself is the projection of these values for the next year. As part of this process, each unit presents its plans and budget to the MD and management team (budget committee) and may, thereafter, make whatever changes result from instructions from or negotiations with the budget committee. Approved budgets then become the road-map for operations in the coming year.

Ideally monthly or quarterly budget reviews track performance against the budget. As part of such reviews, changes to the budget may be approved. At year-end Scaters managers may be judged by their performance against the budget.

An overview of the Scaters budget process is presented within Figure 23.

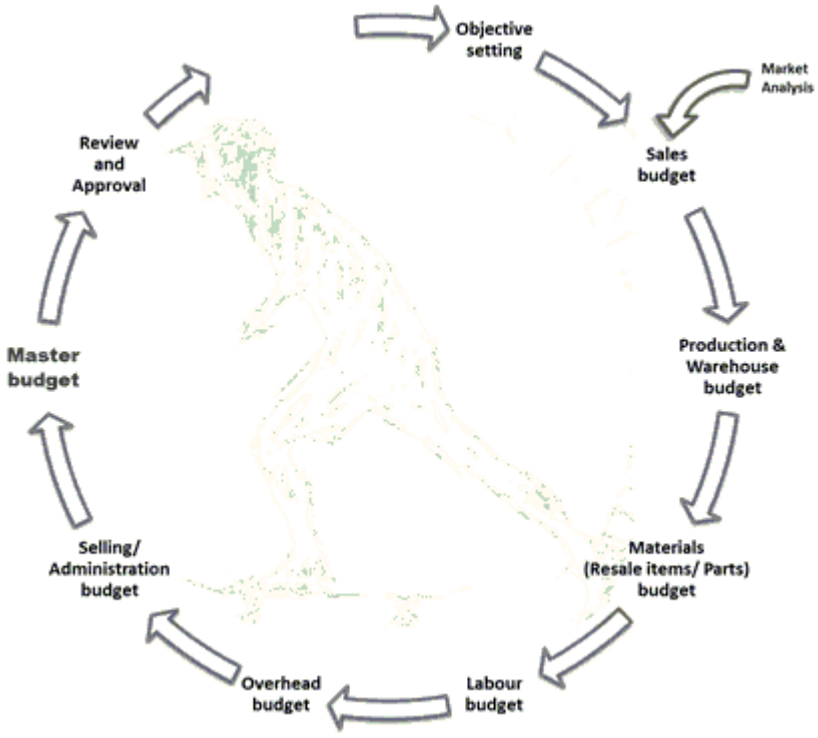


Figure 23 Scaters Budget Process

Once all activities have been completed you should print the master budget and explain it at the budget meeting if one is set. If there is no scheduled meeting you should use the master budget as a context to

generating and evaluating strategic investment opportunities. Such opportunities may be presented to the MD.

Running in parallel with the master budget process is the capital investment process. This is outlined within Figure 24.

Having completed this stage, the company may then focus on implementation and operating in the New Year. Thus the cycle is repeated.

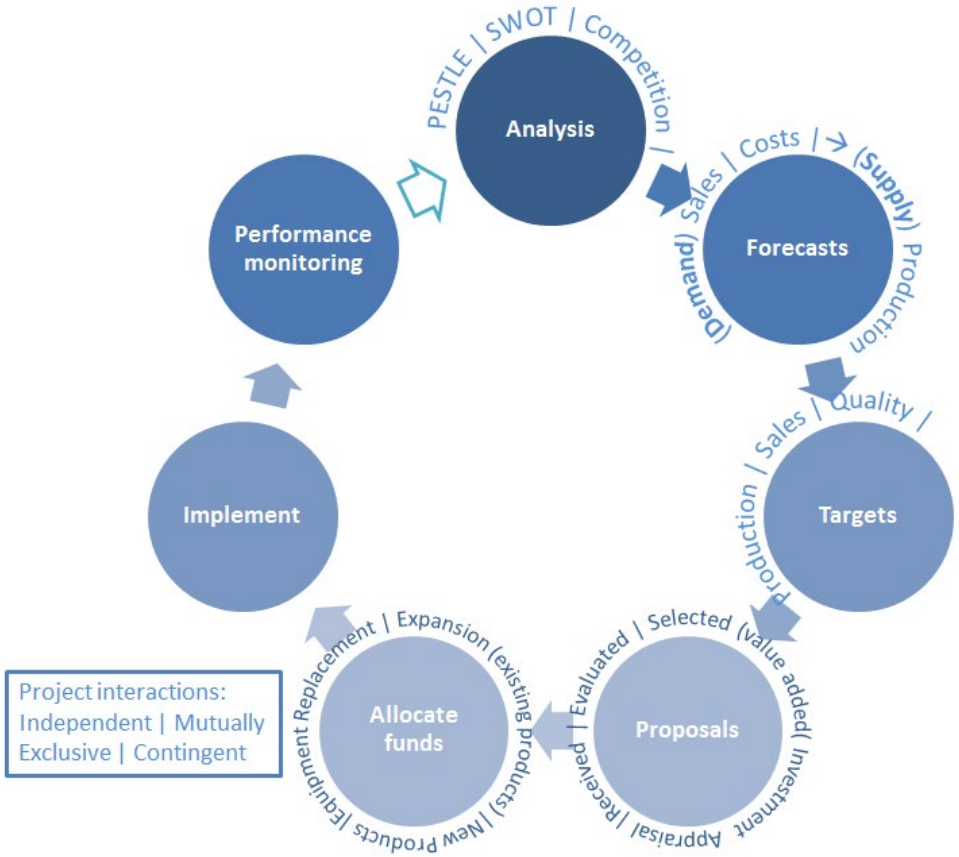
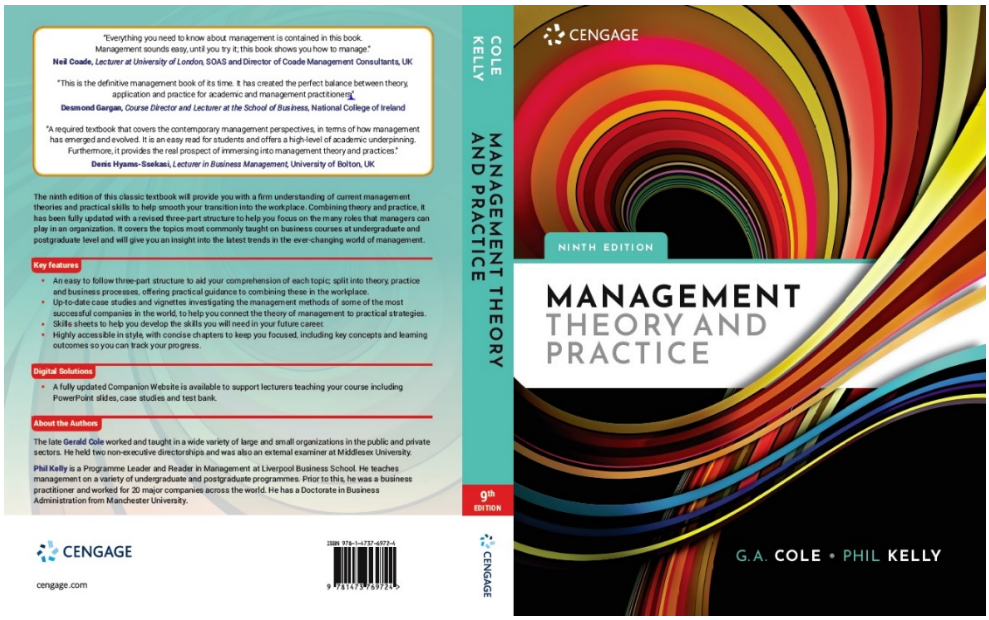


Figure 24 Capital investment

Simulation End

When the simulation is over you should reflect on what you have learnt. The Management textbook will help you to do this.



Learn from the simulation experience
Watch this 25 minute video to learn how to reflect on your Scater's experiences
https://www.scaterboys.com/simulation/learning-from-the-simulation/

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