

**e-Training: Refreshing your Purchasing Card Knowledge at your Own Pace**

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## **Abstract**

*In the current economy, many Universities are realizing the benefits of utilizing a credit card payment system, also referred to as a Purchasing Card Program. Some benefits include: prompt pay to the vendor, cost savings from reducing data entry and check payments, convenience to the purchaser, and a percentage of rebate from the dollars spent. Unfortunately with such benefits there are also potential issues to watch for; namely items that are deemed inappropriate for purchasing using this method, or keeping documentation for every purchase. To combat this vulnerability, the proper training of every cardholder is integral.*

*Our current policy only requires one mandatory training session with each cardholder prior to releasing the card to the individual. As program changes come about, we notify cardholders via mass email and announce the changes in both a monthly fiscal meeting, as well as our quarterly newsletter. However, we realize that additional training would greatly reduce incorrect purchases made by cardholders who have held their account for over a year.*

*Logistical problems came with the idea of “ongoing” retraining sessions due to the size of our program; we maintain approximately 1500 accounts. We needed to come up with a retraining program that didn’t require the time of an instructor and could be flexible with when the cardholder could attend. Our solution: A PowerPoint based online training session.*

*The benefits are quite evident; it’s available whenever the cardholder has 30 minutes to spare, no instructor is needed, and it moves as quickly or slowly as the cardholder chooses. In addition, we placed a “Certificate of Completion” at the end of the program that is time and date stamped with when the training was completed. The cardholder can then choose to receive credit for taking the training.*

*Our online training program can be found at:*

*<http://www.procurement.virginia.edu/main/departments/PCardRefresherTraining.ppt>*

## **Introduction of the Organization**

The University of Virginia is distinctive among institutions of higher education. Founded by Thomas Jefferson in 1819, the University sustains the ideal of utilizing education to develop leaders who are well prepared to help shape the future of the nation. The University of Virginia (U.Va.) remains public, supported by both the Commonwealth of Virginia and the generosity of its alumni.

The University of Virginia has ranked number 2 (in a tie with the University of Michigan) among public universities, according to the 2005 *U.S. News & World Report*. Since *U.S. News* began ranking public schools in 1998, U.Va. has never been lower than No. 2. In its 2005 edition of "America's Best Colleges," *U.S. News* also ranked U.Va. as No. 22 in its Top National Universities category, which includes public and private institutions.

Enrollment for the 2003-04 school year showed 19,643 students, comprised as 65 percent undergraduate, 24 percent graduate, 8 percent as first-professional (law and medicine), and 3 percent on-grounds continuing education. The University offers forty-eight bachelor's degrees in forty-six fields, ninety-four master's degrees in sixty-four fields, six educational specialist degrees, two first-professional degrees (law and medicine), and fifty-five doctoral degrees in fifty-four fields.

As a member of the highly competitive Atlantic Coast Conference, U.Va. fields twelve intercollegiate sports for men and thirteen for women. The intercollegiate athletic program ranked 30<sup>th</sup> in the final 2003-04 Division I United States Sports Academy Directors' Cup standings. U.Va. had 224 student-athletes named to the 2003-04 Atlantic Coast Conference Honor Roll, which is comprised of student-athletes who participated in a varsity-level sport and registered a grade point average of 3.0 or better for the full academic year.

The mission of our Procurement Services Department is to support the purpose and goals of the University of Virginia -- its educational, research, patient care, and public service missions -- by purchasing and providing quality goods and services at competitive prices, proper financial stewardship for payments, and providing responsive and responsible service to all University departments.

We achieve our mission by dedication to excellence in customer service, providing avenues of access to businesses, processing orders in a timely manner, streamlining operations, pursuing cost savings, identifying new sources of supply, developing relationships with small, minority, and women-owned vendors, and complying with all laws of the Commonwealth of Virginia.

### **Statement of the Initiative**

In the current economy, many Universities are realizing the benefits of utilizing a credit card payment system, also referred to as a Purchasing Card Program. Unfortunately there are issues to watch for; namely items that are deemed inappropriate for purchasing using this method, or keeping documentation for every purchase. To combat this vulnerability, the proper training and re-training of every cardholder is integral. We needed to come up with a retraining program that didn't require the time of an instructor and could be flexible with when the cardholder could attend.

## **Design**

Our current policy only requires one mandatory training session with each cardholder prior to releasing the card to the individual. As program changes come about, we notify cardholders via mass email, announce the changes in both a monthly fiscal meeting, as well as our quarterly newsletter, and then we post the changes on our website. However, we realize that additional training would greatly reduce incorrect purchases made by cardholders who have held their account for over a year.

Logistical problems came with the idea of “ongoing” retraining sessions due to the size of our program; we maintain approximately 1500 accounts. We needed to come up with a retraining program that didn’t require the time of an instructor, could be flexible with when the cardholder could attend, and was economical to develop and maintain. Our solution: A PowerPoint based online training session.

Once we determined the method to use for training, we needed to put the material together. Our goal was to provide the right mix of information and avoid repeating all of the information already posted on our website. We then found that much of the information in our training manual had not been posted on our website, so we needed to balance what we had and what we absolutely needed. cardholders’

While it sounds like this process of choosing the data took awhile, it actually took a relatively short period of time, mainly because the presentation was written by our Purchasing Card Administrator who directs training sessions at least once per month. After we gathered all of our data and the proposed idea for the template, the next step was to meet with our Information Technology (IT) group to determine their requirements for such a program.

Their largest concern was to ensure we duplicated the least amount of information already on our site as possible. This would aid in limiting the time needed to update policy changes, as you would only need to update one location instead of multiple times. In addition, directing users back to our site would assist them in locating the information at a later point without needing the detailed information in the training program.

The other questions that arose were how we would know that the user had in fact taken the training, and whether or not we would keep track of those completions.

We determined that a certificate should be placed as the last slide in the presentation, but it should also have the time and date stamp of when the training was completed. This would help us know the user had finished the training and when, but we found that we could also use the certificate to keep track of the cardholders trained. By placing blank lines for the user to enter in their name, email address, and signature and then faxing the certificate to us, we could place that document in their file to note they had taken the training.

## **Implementation**

Once we had the PowerPoint presentation ready for viewing by the University community, there were only two steps to implement it: placing it on our website and promoting it. Our IT group placed it on our website for us without any difficulties. We found the best part about having a PowerPoint project online is that it is automatically protected against change, so data integrity is preserved well.

We started promoting the tool by using a mass email announcement to the University community, then followed up with an announcement at our monthly Fiscal meeting. As another

chance to reach the cardholders, we wrote an article in our quarterly Purchasing Card Newsletter about the new training available.

## **Benefits**

The benefits of having this program available are quite numerous. For our current cardholder base, it's available whenever the cardholder has approximately 30 minutes to spare, no instructor is needed, and it moves as quickly or slowly as the cardholder chooses. Additionally, the cardholder has the chance to familiarize himself with the locations of useful information on our website for future reference.

Another benefit to this availability of information is that supervisors or fiscal administrators can also utilize this to refresh themselves of the policies and procedures of the program. Since the supervisors are required to approve the transactions of their cardholders, it is just as important that they are as familiar with the regulations as the cardholders themselves.

Once we began using this in conjunction with the other aspects of our program, we found that this was also useful for recommending to particular cardholders. For example, if the Purchasing Card Administrator audited the documentation of a cardholder and found that retraining would be useful. The Administrator could then explain the deficiency that was found and request the certificate by a certain date. Without any extra effort on the part of the Administrator, the cardholder could refresh himself on the policies he needed some help with at a time that is most convenient to his schedule.

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