

ERP Process and Systems Trainer (MCIPD)



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ERP Training

<http://Stevemorganerptraining.com>

Experience Summary

- 30 Years' experience of full training lifecycle: Data analysis, system testing, workshops, classroom pilots, user acceptance testing, training delivery, post training/floor walking support.
- Experience of business change/improvement and stakeholder management. Clarifying and mapping business processes. Software testing, analysing and validating business data. Many mobile device rollouts.
- Multiple project implementations on:
 - **MS AX (2009 / 2012 R2 & R3/ D365 & CE)**
Human Resources | Finance – AR AP GL | Supply Chain Management | Enterprise Asset Management | Service and Rentals | Trade and Logistics
CE - Project Operations | Field Service | CRM |
 - **SAP (R3 and ECC 6.0 and Hana)**
HR | SD | MM | FICO | BW
 - **Agresso (Unit4 Business World)**
Human Resources | Payroll
 - **Bespoke ERP systems**
HR | Finance | Utilities | Highways | Telecoms | MOD | Building Maintenance |
 - **MS Office and Windows**
Excel | Word | Outlook | PowerPoint | SharePoint | CRM | Windows 7 10 & 11 |
- I Create full training packs (reference guides, quick cards, lesson plans, exercises, presentations) including e-learning (Captive 11 and Articulate Storyline 2)

CAREER SUMMARY

December 25 - Present **Cheshire West and Chester Councils**
Governance and Support Officer

Short term contract updating training documentation. CWC use Unit4 (Agresso).

August – September 2025 **BR1 Consulting**
D365 Finance Trainer

Trained Norse Group AR Ops staff remotely on AR processes.

July - August 2025 **OCU Digital (Preston)**
PMO Training Consultant

UAT testing, and preparation for training, for all OCU telecoms back office staff and operatives (500) with utilities management system OCU One.

May – June 2025

BR1 Consulting
D365 Finance Trainer

Trained OCS Utility staff on AP, PMA, and GL processes.

Aug 2024 – March 2025

Insights Dundee
D365 Finance Trainer

SIT and UAT testing, while creating quick reference guides and eLearning content using Storyline 360. Training users in Germany on finance processes, while preparing for training in France, Belgium and Netherlands.

Created videos on: Financial Dimensions, PO & SO Financial Vouchers Posting, Month End Processes, FIFO, Revenue Recognition, Bank Reconciliation, and Intercompany Financial Vouchers Posting.

Jan 2024 – Mar 2024

OCU Stockport
D365 AP Trainer

Trained all AP clerks and managers on AP processes for supplier maintenance, invoicing, and payments. Created documentation using Scribe.

Feb 2022 – Dec 2023

SCC Birmingham
CE/D365 Project Operations / P2P Trainer

Worked as part of a project implementation team working through workshops, and CRP sessions. I delivered a 12 week training programme followed by drop-in sessions leading up to UAT. I designed Project Operations training documentation and videos for 340 users ranging from contract/project creation to project manager/resource scheduling, actuals and invoicing from Project Operations through dual write into Fin Ops.

Created training documentation and videos for Purchase Ledger team. Delivered training for all AP staff.

Nov 2021 – Jan 2022

Calor Gas
Senior SAP Trainer

Part of a small team of trainers preparing to rollout SAP across 8 Customer Operation Centres (COC) and 40 Cylinder Distribution Centres (CDC). I am supporting the Demand-to-Stock work stream that transport gas to the production plants, fill cylinders, and then transport the cylinders to CDC's.

Feb 2021 – Nov 2021

Vestas Offshore Wind
Ops Support Consultant

I supported UK construction and service sites, resolving Dynamics AX system issues, including time recording problems, scheduling and work orders, inventory movement and asset management. I delivered training to new technicians, warehouse coordinators and supervisors.

Apr 2020 – Feb 2021

NHS Test & Trace
Customer advisor T2 and T3

I was part of a team of advisors working from home calling confirmed cases of Covid-19 to complete a questionnaire and backwards trace events and dates to identify the possible transmission source. I advised them of the isolation process and recorded their details on NHS systems CTAS and Synergy.

Jan 2020 – Mar 2020

Leggett & Platt Canada
D365 AR Consultant

Working remotely, I created training guides for a planned rollout in June.

Oct 2018 – Dec 2019 **SCC Birmingham**
D365 CE Field Service Trainer

Working closely with Business Development and Implementation team, working through Sprint sessions with Hitachi developing and identifying processes. Creating role-based training documentation for 10 separate roles with five levels of security. Conducted TTT sessions with 45 users who have been identified as trainers and super users. Prepared for training the following:

- Moving stock internally, between warehouses, and to ByBox locations and engineers van stock
- Create warehouses, locations, and bins
- Create products and product master/variants
- Pick and ship
- Set re-order levels and adjust/replenish stock
- RMA products back into stock, or move to repair centre

Apr 2018 – Aug 2018 **Arrow ECS**
Iasset.com Training Consultant

I delivered training to 80 Arrow Sales representatives in Newmarket, Harrogate and Poland on a cloud-based quote renewals tool – Iasset.com. This is a third-party add-on to Dynamics AX. I developed the training materials: training manuals, quick reference cards, exercises, lesson plans, and PowerPoint.

Sep 2017 – Jan 2018 **SCC Birmingham**
D365 HR Trainer

I delivered D365 training to 18 HR and Recruitment users. I conducted 14 MSS navigation sessions to managers and ESS sessions to employees, including remote users over WebEx. I provided post training support helping users with process and functional issues. I created all training documentation and videos using Captivate 9.

Jul 2017 – Sep 2017 **LGSS**
Agresso HR & Payroll Consultant

I delivered Unit4 (Agresso) training to 32 HR and Payroll staff in Northampton, Milton Keynes, and Cambridge. I also conducted MSS navigation sessions to 34 managers. I created full training packs: user guides, lesson plans, exercises and quick reference guides.

Dec 2016 – Jul 2017 **Arrow ECS**
AX2012 AR Training Consultant

I delivered Sales quotes, Sales orders and EDI training in Harrogate, Poland and Newmarket to 130 Sales staff. I delivered training on the Product catalogue, Buffer management and creating SKU requests. The NetSec division (Newmarket), retained Navision to create Sales quotations, so I trained them on how to export quotations from Navision to Dynamics AX, including field setup. I created full training packs: training manuals, quick reference cards, lesson plans and exercises.

Feb 2016 – Dec 2016 **Interserve**
AX2012 Training Consultant (HR / Purchase 2 Pay)

I delivered training to 90 Shared Service Centre HR users and 80 Procurement users on multiple sites across the UK. I carried out business analysis, data gathering, TNA, and process mapping. I was heavily involved in UAT training, performing end-to-end testing and resolving process fixes. Full training material development, including quick reference cards for 5000 managers in readiness for the introduction of MSS (Manager Self Service). I created a number of short presentations using Captivate 9.

Oct 2015 – 24 Dec 2015 **Kodak Alaris Rochester NY**
AX2012 Training Consultant

I developed full training packs for the North American implementation in Sales order management. Kodak used internal trainers to deliver the training. The content included raising Sales orders, Customer consignment, Intercompany Sales order, back to back Sales orders, shipping and Return orders.

Jul 2015 – Sep 2015 **AQA Manchester**
AX CRM 2015 Training Consultant

I trained 40 Sales, Marketing, and Support staff on CRM in multiple locations around the UK. The content included Case management, Event management, Sales management, Marketing and advanced find & view, charts and reports. I developed full training packs for implementation.

Mar 2015 – Jun 2015 **AMEC Foster Wheeler Knutsford, Cheshire**
AX HR 2012 Training Consultant

I developed full HR training packs for AFW North America implementation. AFW used internal trainers to deliver training. I updated and added new content to the training packs I created for AFW in 2014. I also created short videos using Articulate Storyline.

Feb 2015 – Mar 2015 **Wyevale GC, Brentford**
AX2012 Trainer (Trade & Logistics)

I trained Wyevale Buyers and SCM admin staff on creating and maintaining SKU's, Category hierarchy, Store assortments, and Stock/price checks. I created full training packs for the project.

Jan 2015 – Feb 2015 **Hanson Building Products, Derby**
Business Process Analyst

Hanson BP required their operating procedures to be updated before being sold to new owners. I performed TNA on six staff in six departments, analysed and mapped business processes. I fully documented operating procedures for Sales/design, Procurement, Production, Despatch, Finance, and QC.

Oct 2014 – Nov 2014 **Corillion/Amey, Leyland**
IT (MOD) Trainer

Corillion Amey building maintenance division was moving MOD staff onto a bespoke ERP system. As part of a team of three trainers, we trained 140 staff on bespoke back-office building maintenance system and hand-held devices.

Jun 2014 – Sep 2014 **Assa Abloy, Finland**
AX HR 2012 Consultant

Assa Abloy required HR and Time & Attendance system processes documented and training documentation for internal trainers to deliver. I created HR and T & A training packs, including video in English using Captivate. I reconstructed screenshots in Finnish and Swedish ready for text translation into Finnish and Swedish.

May 2014 – Jun 2014 **Strike Energy, Canada**
AX HR / EAM 2012 Trainer

Strike Energy required the development of training documentation for internal trainers to deliver. I created full training packs for HR (hire to retire), and Enterprise Asset Management – including creating the project, maintenance and equipment services.

Mar 2014 – May 2014 **AMEY, Cambridge**
SAP Operations and Commercial Trainer (SAP ERP 6)

As part of a team of three trainers, we trained 80 highways staff, including planners, operations staff and field service engineers. Delivering training on the creation of work orders, sales orders, project builder, billing and planning board. I created training guides for the Operations staff and quick reference guides for the field service engineers.

We trained field service engineers to complete work orders and incidents on mobile solutions, including adding crew members, time sheets, plant and components.

Jan 2014 – Mar 2014 **AMEC Group Knutsford, Cheshire**
AX HR 2012 Consultant

Provided roll-based HR training for 18 HR end users following UAT. Full training pack: training manuals, quick reference cards, exercises, lesson plans, and PowerPoint presentations.

Aug 2013 – Nov 2013 **Kuoni GTS, Barbican, London (Travel & Leisure)**
AX AP 2009 Consultant

Working with Assima (UK), I created full Finance AP training packs – training manuals, slide packs, exercises, lesson plans, and course outlines (including Captivate) for a worldwide implementation.

May 2013 – Aug 2013 **Proserv, Aberdeen (Oil and Gas)**
AX 2012 Consultant

I developed training material only as Proserv used internal trainers to deliver training. I created full training packs – training manuals, quick reference cards, exercises, lesson plans, and PowerPoint presentations for:

Finance: AR, AP, GL, Fixed Assets, Bank Reconciliation

Stock and Warehouse Management

CRM – Cases, event management, marketing, advanced find and views

Customer service orders, maintenance orders, external repairs and invoicing

Rental quotations and orders, sub-hire orders and invoicing

Human Resources – Jobs and positions, onboarding, benefits, transfers and terminations

Nov 2012 – Feb 2013 **CEDA International, Calgary, Canada (Oil)**
AX 2012 HR / CRM Consultant

Worked with Hitachi developer, project manager and CEDA business expert to develop training material and course design. I trained 24 HR end users in Calgary and Edmonton following CRP and UAT. Created full roll-based training pack: training manuals, quick reference cards, exercises, lesson plans, and PowerPoint presentations.

Aug 2011-Oct 2012 **Hanson Aggregates**
SAP Process & Systems Contract Trainer (SAP ERP 6)

Member of a national implementation team of six trainers. We delivered two-day SAP courses to 400 staff employed in quarries, asphalt and concrete plants. Trained plant staff on Sales orders, Purchase orders, scheduling materials, goods movement, cash sales, stock counting and inventory reporting (SD & MM).

Aug 2004-Mar 2011

(Redundancy)

Enterprise plc, Leyland, Lancashire

Business Improvement Process & Systems Trainer

Employed as a BI Process and Systems Trainer by Enterprise, a multi-billion-pound service company with major contracts in all sectors of the UK's infrastructure, utilities, housing maintenance, MOD, highways and telecoms. They have developed an in-house bespoke ERP system 'WorkManager,' a suite of 80 core applications – on many of which I delivered training.

- Trained end users on Dynamics AX 2009 - HR module / CRM
- Conducted TNA in line with departmental and business strategy
- System tested new bespoke applications, identifying/ logging code errors and liaising with developers
- Managed End user application testing (UAT) environment, provided functional test scripts
- Delivered training and floor walking support to diverse audience of end users from gangs to directors
- Delivered train the trainer (TTT) sessions across divisions
- Clarified business process and mapped current as-is and to-be processes for Sales Ledger, Purchase Ledger, Treasury and Payroll.
- Managed Finance/Payroll training projects, supporting the implementation of third-party applications
- Project managed the implementation of Sales Invoice & Credit Note Intranet application
- Implemented Readsoft Invoice scanning application, including testing, optimizing & training PL staff
- Part of a Business Improvement and Change Management team (2009-2011)
- Trained large conversion to MS Office 2010 (Excel / Word to advanced level) and Windows 7.
- Delivered hand-held device training for Utilities, MOD, Telecoms and Public Sector Divisions
- Member of an implementation team integrating newly acquired companies onto Enterprise applications, revising their processes and providing ops support until they were fully integrated
- Analysed, validated / purged customer legacy data prior to upload onto Enterprise systems
- Managed a team of 26 trainers as Deputy Training Manager (2005 – 2009)
- I deliver classroom led training, 1-to-1, multimedia and WebEx/Skype - directly or over VPN/Citrix. I provide floor walking support aided with e-learning packages (KS Tutor), training manuals, and quick reference cards that accommodate different learning styles

Mar 2000-Aug 2004

(Redundancy)

Burton's Foods, Blackpool, Lancashire

Group SAP Computer Trainer (SAP 4.6)

- Designed & delivered training programme for major SAP 4.6 rollout including training in SD, MM, FICO, BW and HR / Payroll transactions.
- Configured SAP Payroll and HR transactions, creating shift patterns, adding positions to the organisational structure and creating qualifications transactions.
- Worked through test scripts working closely with the Functional Consultant to ensure thorough understanding of end to end HR & Payroll processes.
- Developed role-specific training manuals, quick reference cards and PowerPoint slides.

Jun 1990-Feb 2000

Burton's Foods, Cwmbran, Gwent
HR Officer

- Generalist HR role, hiring in excess of 200 employees each year due to high turnover. Supported line managers in movement and promotion selection. Guided line managers in employment law when assisting in disciplinary interviews and dismissals.
- Trained new HR staff in the Company's HRIS PS2000 prior to the implementation of SAP.
- Assisted with the implementation of the Payroll Time & Attendance system - Time Manager. Created shift patterns, tested calculations, ran simulations alongside legacy system before go-live.

EDUCATION AND QUALIFICATIONS

Professional: Chartered Member of the Institute of Personnel & Development
Senior Associate, Institute of I.T. Training
IITT TAP certified
IITT Certificate in Training Design & Development
European Computer Driving Licence

Further Education: NVQ4 Business Improvement
Training Certificate Part I (City & Guilds 7303)

KEY I.T. SKILLS

- ERP: SAP, WorkManager Suite, Dynamics AX, Agresso, Dynamics 365
- Microsoft: SharePoint, CRM, Visio, Outlook, Project, Office 2007/2010/2013/2016/365
- Image Capture: Paint Shop Pro, SnagIt, UPerform
- eLearning: KS Tutor (Knowledge Solutions), Captivate 11 (Adobe), Adobe Storyline 360
- Databases: Access, Approach, Dbase, Delta 5
- Developer: Excel VBA, Power Automate