

EE1: IVM In and Out of Scope Requirements Detail

Req ID	Requirement Description	PS Fit/Gap		Recommended Solution		Scope	
	Statewide Requirement Description	Fit/Gap	Solution Comment	Solution Comments/Assumptions	Solution Full/Partial	Final Requirement Scope (In Scope or Out of Scope)	Gap In-Scope & Out-of-Scope Sub-classification
INV-1	Database to allow for the upload of data from external source including conversion and validation as required (e.g. Legacy system, Excel)	Gap	PeopleSoft allows the upload from an external source. Data source, data target and data mapping must be defined.	Effort required for one-time data conversion is in-scope, on-going ability is not in-scope.	Full	In-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-2	Source data validation controls to ensure data quality, accuracy and consistency on specific fields including text vs. numerical, digits, dashes	Fit	Standard PeopleSoft field edit validation	Delivered functionality	Full	In-Scope	
INV-3	Database will have the identified fields listed in the Data fields tab ; data fields will be labeled with standard NIMS resource typing	Gap	NYS uses the UNSPSC category codes to classify items. A 254 character free text field is provided, to enter a descriptive item information.	NYS uses the UNSPSC category codes to classify items. A 254 character free text field is provided, to enter a descriptive item information.		Out-of-Scope	7 Charter - Outside of Charter Scope (Gap Out-of-Scope)
INV-4	Ability to provide functionality for various types of assets through extensibility including but not limited to: equipment, vehicles, consumables	Fit	Item configuration	Delivered functionality is achieved through Item configuration.	Full	In-Scope	
INV-5	Ability to accommodate and support the inclusion of new or pre-existing bar codes, QR codes or other proprietary codes that will be associated with the asset tracking	Gap	NYS established Item ID must be included in the barcode. Hand Held Unit using the existing barcode program in 9.0 has the ability to scan any barcode format.	PO: Current, in-use process will be used. Any expectation that existing barcodes would be mapped to Items would be out-of-scope.	Partial	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)
INV-6	Ability to track status of adherence to required maintenance for scheduled per user defined schedule.	Fit	Delivered PeopleSoft Maintenance Management supports user defined maintenance schedule. PeopleSoft Inventory does not include Item maintenance	PeopleSoft Inventory does not include Item maintenance. Delivered PeopleSoft Maintenance Management supports user defined maintenance schedule.	Full	Out-of-Scope	6 Charter - Met by Post-EE1 Module (Gap Out-of-Scope)
INV-7	Ability to track categories of GPS (Global Positioning System) enabled assets	Fit	Delivered PeopleSoft AM supports GIS integration. This is out of scope per EE1 Project Charter	Delivered PeopleSoft AM supports GIS integration. This is out of scope per EE1 Project Charter.	Full	In-Scope	

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INV-8	Ability to record details related to a specific transaction for future audit reference	Fit	Transaction information is recorded for all inventory transactions.	Delivered functionality .	Full	In-Scope	
INV-9	Ability to accommodate owned, rented, leased, borrowed and donated equipment, consumables and vehicles	Fit	Delivered functionality allows for items to be established as owned and identified item as consumable. The Inventory Comments page can be used to enter specific item information while in inventory.	Delivered functionality .	Full	In-Scope	
INV-10	Ability to support defined units of measure for consumables (e.g. 1 pallet of water = 100 cases = 1,000 12oz bottles)	Fit	Delivered functionality allows for Unit of Measure conversion to be established	Delivered functionality.	Full	In-Scope	
INV-11	The database will have the ability to store expiration dates for consumables	Fit	Delivered Lot Control Information allows for the Lot expiration date to be recorded.	Delivered functionality .	Full	In-Scope	
INV-16	The system shall provide the ability to be utilized with, or without, network connectivity with the capability of syncing back up with the database once connectivity has been re-established	Gap	Existing 9.0 transaction file created, can remain on hand held until connectivity is re-established.	Existing 9.0 transaction file created, can remain on hand held until connectivity is re-established.	Full	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)
INV-17	The system shall allow for the printing of unique bar code tags	Gap	Business process must be defined. P-Touch printer and barcode printing software may be used.	Business process must be defined. P-Touch printer and barcode printing software may be used.	Full	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)
INV-18	Ability to display mapping data to allow for the tracking and monitoring of deployed equipment with GPS devices	Fit	PeopleSoft Inventory does not have the ability to display mapping data. PeopleSoft Asset Management supports this requirement. This is Out of Scope per EE1 Project Charter	PeopleSoft Inventory does not have the ability to display mapping data. PeopleSoft Asset Management supports this requirement. This is Out of Scope per EE1 Project Charter		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)

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INV-19	Ability to attach, print and forward documents to asset records / inventory transactions (such as issuances) (e.g. PDF, JPG, GIF file formats)	Gap	Delivered PeopleSoft Inventory does not provide attachments at issue time. These transactions are recorded and can be accessed in read only mode.	Delivered PeopleSoft Inventory does not provide attachments at issue time. These transactions are recorded and can be accessed in read only mode.		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-23	Inventory, asset management, maintenance and mobile management modules will all be integrated	Gap	The system has a delivered integration between INV and AM. Existing custom Maintenance page on 9.0 will be used as the integration between INV, AM and Maintenance.	The system has a delivered integration between INV and AM. Existing custom Maintenance page on 9.0 will be used as the integration between INV, AM and Maintenance.	Full	Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-24	The system will integrate with Incident Management at the State EOC (Emergency Operations Center)	Gap	This requirement is the same as Requirement INV-204	This requirement is the same as Requirement INV-204		Out-of-Scope	10 Duplicate Requirement (Gap Out-of-Scope)
INV-25	The system will integrate with Responder Credentialing	Gap	This interface would require coordination with Responder Credentialing system staff	This interface would require coordination with Responder Credentialing system staff		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-26	Ability to integrate with the AVL (Automatic Vehicle Locator) vendor, at a minimum, at the Asset ID level	Gap	This interface would require coordination with Automatic Vehicle Locator system staff	This interface would require coordination with Automatic Vehicle Locator system staff		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-27	Ability to limit access to authorized users only by Item and Category of Item, or based on limited role-based access for specific Business Units and within a Business Unit	Gap	Business Process must be defined. Security access can be designed to be role-based at the business unit level and/or at the item classification level.	PO: Rely on Business Unit security only for EE1 - Partial Fit	Partial	In-Scope	1 Partially Met, Delivered Only (Gap In-Scope)

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INV-29	Ability to allow users to manually enter item information directly into a user interface.	Fit	The Item Master Control staff will enter item information and Item updates as requested.	The Item Master Control staff will enter item information and Item updates as requested.		In-Scope	
INV-30	Ability to spell check critical for text fields (e.g. Names, descriptions)	Fit	Delivered spell check functionality is applicable to comments field.	Delivered functionality .	Full	In-Scope	
INV-31	The system shall support the ability to classify, inventory, track and deploy donated consumables and equipment **Contact Individual Assistance Program within the Recovery Office of DHS01 to clarify 'donations'**	Fit	The delivered Inventory Comments page can be used to enter donation information.	Delivered functionality .	Full	In-Scope	
INV-32	Ability to classify, inventory, track and deploy rented equipment	Fit	Delivered inventory comments field can be used to enter information for rented equipment while in Inventory	Delivered functionality .	Full	In-Scope	
INV-33	Ability to classify, inventory, track and deploy loaned equipment	Fit	Delivered inventory comments field can be used to enter information for loaned equipment while in Inventory	Delivered functionality .	Full	In-Scope	
INV-34	Ability to export and import inventory information via an external resource to support a mass change (e.g. Items)	Gap	PeopleSoft allows the upload of data from external resources. Data source, data target and data mapping must be defined.	PO: Will be met through an Incident to SFS and potential Change Request after go-live to further refine the requirement	Full	Out-of-Scope	7 Charter - Outside of Charter Scope (Gap Out-of-Scope)
INV-35	Ability to acknowledge the receipt of serialized inventory items to accommodate the purchases of quantities of items (e.g. ten 16" chain saws were purchased)	Fit	Serial ID is required for individual item when serial controlled items are received into inventory	Serial ID is required for individual item when serial controlled items are received into inventory	Full	In-Scope	
INV-36	The system will support the ability of municipality based EOC's (Emergency Operation Centers) to also use the application	Gap	State Application security design limits access to user accessibility	State Application security design limits access to user accessibility		Out-of-Scope	9 Contrary to Best Practice Design (Gap Out-of-Scope)

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INV-37	Ability to perform en masse editing of inventory items e.g. If the name of a manufacturer changes	Gap	The Item Master Control staff will enter item information and Item updates as requested.	PO: Will be met through an Incident to SFS and potential Change Request after go-live to further refine the requirement.	Full	Out-of-Scope	7 Charter - Outside of Charter Scope (Gap Out-of-Scope)
INV-38	Ability to provide alert messaging through e-mail	Fit	Assuming that this requirements relates to material/equipment deployment. The system has the ability to sent a notification via workflow when the Material Stock Request functionality is used.	Assuming that this requirement relates to material/equipment deployment. The system has the ability to sent a notification via workflow when the Material Stock Request functionality is used.	Full	In-Scope	
INV-39	Ability for reorder thresholds to be configured for consumables	Fit	Delivered Functionality	Delivered Functionality	Full	In-Scope	
INV-40	The system will allow for the remote deployment of consumables and equipment	Fit	System allows for remote access granted user has the proper security access	System allows for remote access granted user has the proper security access	Full	In-Scope	
INV-42	Ability to search using pre-populated examples of potential search terms	Fit	Delivered search functionality allows for Inventory items be search using description and/or Item ID	Delivered search functionality allows for Inventory items be search using description and/or Item ID	Full	In-Scope	
INV-43	Add search criteria: Serialized, Item ID, Grant or other chart fields or departmental rollup, Components, Kits, Parent/Child relationships drill down to capture aging of the Inventory.	Fit	Assuming that this requirement is to manage aging inventory PeopleSoft has a delivered report that will support that need.	Assuming that this requirement is to manage aging inventory PeopleSoft has a delivered report that will support that need.	Full	In-Scope	
INV-43a	Ability to track what agency owns the Item	Fit	Items will be established in the agencies Inventory Business Unit. State Application security design limits user access	Items will be established in the agencies Inventory Business Unit. State Application security design limits user access	Full	In-Scope	

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INV-45	Ability to save search criteria in the application for future use	Fit	Delivered functionality allows search criteria to be saved	Delivered functionality	Full	In-Scope	
INV-46	Ability to export the search results as a pdf or Excel file.	Fit	Search results can be exported to Excel on delivered pages.	Search results can be exported to Excel on delivered pages.	Full	In-Scope	
INV-47	Ability for users to scan an item and the associated record will display scanned information (e.g. Storage Location, Description of Item, Item #, Issued To, On Hand Balance, Cost)	Gap	An inquiry page may be added to the barcode program to display desired item information. This information will need to be extracted from the database in a file format and loaded to the scanner at sync time.	An inquiry page may be added to the barcode program to display desired item information. This information will need to be extracted from the database in a file format and loaded to the scanner at sync time.	Full	Out-of-Scope	9 Contrary to Best Practice Design (Gap Out-of-Scope)
INV-48	Ability for users to assign items to first responders - integration with responder credentialing	Gap	Responder Credentialing effort is on hold	Responder Credentialing effort is on hold	Full	Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-49	Ability to record physical transferred items without changing ownership, excluding capitalized equipment from one agency to another agency in and out of an emergency. Inter/Intra Unit transfer	Fit	Emergency Inventory system assumes that items do not change ownership. Physical possession and ownership are two different things. Emergency Inventory deals with physical possession.	Emergency Inventory system assumes that items do not change ownership. Physical possession and ownership are two different things. Emergency Inventory deals with physical possession.	Full	In-Scope	
INV-50	Ability to assign assets from one agency to another agency e.g. DOT assigns OEM a light tower	Fit	Delivered Inventory InterUnit Transfer application can be used to transfer assets from one agency to another	Delivered Inventory InterUnit Transfer application can be used to transfer assets from one agency to another	Full	In-Scope	
INV-51	The system shall provide the capability to manage the decrement of consumable quantities as items are deployed and to capture the location/person of deployment	Fit	Delivered functionality decreases quantities once the fulfillment process is completed	Delivered functionality decreases quantities once the fulfillment process is completed	Full	In-Scope	

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INV-52	The system shall provide the capability to manage the increment of consumable quantities as items are ordered and restocked	Fit	Delivered functionality increases quantities once the fulfillment process is completed	Delivered functionality increases quantities once the fulfillment process is completed	Full	In-Scope	
INV-53	Ability to calculate how many units are associated with the object e.g. pallet of water = 100 cases of water with 24 bottle/case	Fit	System allows for Unit of Measure conversion to be established for each item	System allows for Unit of Measure conversion to be established for each item	Full	In-Scope	
INV-54	The system shall provide the ability to capture the location of the equipment if/when the equipment moves to another location without passing through a staging area or stockpile	Gap	This activity will be policy decision. System does not prevent asset movement without passing through Stockpile	This activity will be policy decision. System does not prevent asset movement without passing through Stockpile		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-55	Ability for a user to select an item from a search results list and deploy that item to a particular location.	Fit	Delivered search functionality allows for Inventory items be search using description and/or Item ID	Delivered search functionality allows for Inventory items be search using description and/or Item ID	Full	In-Scope	
INV-56	Ability for a user to manually enter the location to where the item will be deployed, a contact name associated with that location, day and time of deployment of that item and estimated return of that item or note item as perishable and not to be returned	Fit	The delivered Express Issue function has the ability to enter ship to, contact, item id, day and time of deployment. This functionality does not have	The delivered Express Issue function has the ability to enter ship to, contact, item id, day and time of deployment.	Full	In-Scope	
INV-57	Ability for a user to scan the bar code of an item and provide the location to where the item will be deployed, a contact name associated with that location and estimated return of that item	Gap	Existing 9.0 Issue Transaction on the hand held application will be used. This transaction does not include a field to enter the estimated return date.	PO: Potential to document via existing handheld fields.	Partial	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)

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INV-58	Ability for an alert to be sent to the requestor that the item has been received at the incident and/or staging area.	Gap	Requestor information is not entered in the database. This will need to be a manual process	Requestor information is not entered in the database. This will need to be a manual process		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-59	Ability for an alert to be sent to the requestor that the consumables have hit the pre-determined threshold and an order needs to be placed (if not already automated)	Fit	Assuming this relates to replenishment. A report will be developed to list item inventory balance. The report results will assist to determine inventory to be replenished.	Assuming this relates to replenishment. A report will be developed to list item inventory balance. The report results will assist to determine inventory to be replenished.	Full	In-Scope	
INV-60	Ability for a user to easily generate a report that will provide a listing of those items still deployed, names associated with those deployed items, Location and estimated return of that item (expected return date).	Gap	A Query report will be created listing all deployed items not returned along with recipient information on record, less expected return date.	PO: Business process could be developed to capture and report this info	Partial	In-Scope	5 New Enhancement - Report Solution (Gap In-Scope)
INV-61	Ability for a user to manually enter into the user interface the actual date when an item has been returned to the inventory, what location the item has been returned to and the condition in which it was returned	Fit	Delivered functionality allows the return information to be entered when an item is returned and received using the Express Put away page. A comments field is available on the page.	Delivered functionality	Full	In-Scope	
INV-62	Ability for the user to scan the bar code of an item upon return to the stockpile and provide additional information as to location in which the item was returned and condition of the item	Gap	Software on the hand held will be updated to include receiving functionality for returned items. This transaction will be added to the hand held transaction file and uploaded to the database via tumbleweed and Bulkload	PO: Will be met by 9.0 customization.	Full	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)

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INV-63	Ability for users to select any of the fields in the database for reporting purposes	Fit	Delivered Query tool allows for reports to be developed ad-hoc. However, NYS security policy does not grant users the ability to create these reports. Report development is to be requested by providing report requirements.	Delivered Query tool allows for reports to be developed ad-hoc. However, NYS security policy does not grant users the ability to create these reports. Report development is to be requested by providing report requirements.	Full	In-Scope	
INV-64	Ability for one or more database fields to be selected	Fit	Delivered Query tool allows for reports to be developed ad-hoc. However, NYS security policy does not grant users the ability to create these reports. Report development is to be requested by providing report requirements.	Delivered Query tool allows for reports to be developed ad-hoc. However, NYS security policy does not grant users the ability to create these reports. Report development is to be requested by providing report requirements.	Full	In-Scope	
INV-65	Ability to use advanced reporting features that will allow users to select any of the fields in the database for reporting purposes	Fit	Delivered Query tool allows for reports to be developed ad-hoc. However, NYS security policy does not grant users the ability to create these reports. Report development is to be requested by providing report requirements.	Delivered Query tool allows for reports to be developed ad-hoc. However, NYS security policy does not grant users the ability to create these reports. Report development is to be requested by providing report requirements.	Full	In-Scope	
INV-66	Ability to filter and/or sort search results	Fit	Query report results can be downloaded into an excel spreadsheet where filters can be applied and the data can be sorted using any of the columns.	Query report results can be downloaded into an excel spreadsheet where filters can be applied and the data can be sorted using any of the columns.	Full	In-Scope	
INV-67	Ability to save, download, print or email reports	Fit	Query report results can be downloaded into an excel spreadsheet, the file can be saved, print and/or emailed	Query report results can be downloaded into an excel spreadsheet. The file can be saved, print and/or emailed.	Full	In-Scope	
INV-68	Ability to date and time stamp reports	Fit	Once report is saved, windows timestamps the record at saved time. The date and time can also be included in the file name	Once report is saved, windows timestamps the record at saved time. The date and time can also be included in the file name.	Full	In-Scope	

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INV-69	Ability to run ad hoc reports using SQL query builder	Fit	SQL application can be used to create SQL reports. However, NYS limits its usage.	SQL application can be used to create SQL reports. However, NYS limits its usage.	Full	In-Scope	
INV-71	Roles will include: 1) View Only 2) Logistics/OEM 3) Stockpile Manager 3) Admin 4) Super Admin 5) Storehouse	Fit	User Roles will be created to meet user needs	User Roles will be created to meet user needs.	Full	In-Scope	
INV-72	Train-the-trainer sessions will be scheduled for each segment of the end user population - in-person and web based.	Fit	This is an EE1 project requirement	This is an EE1 project requirement.	Full	In-Scope	
INV-77	Service Level Agreement with XXXX for the support and maintenance of this module	Fit	This is an EE1 project requirement	This is an EE1 project requirement.	Full	In-Scope	
INV-78	User guides will be written and easily accessible online for end users of the system	Fit	This is an EE1 project requirement	This is an EE1 project requirement.	Full	In-Scope	
INV-79	Must support Return to Vendor Transactions for Credit and for Replacement	Fit	Delivered functionality on the Purchasing Module supports return to vendor transactions and integrates with Inventory.	Delivered functionality on the Purchasing Module supports return to vendor transactions and integrates with Inventory.	Full	In-Scope	
INV-79a	Ability to support Return to Stock transactions (i.e. RMA)	Fit	Delivered functionality supports return to stock transactions	Delivered functionality supports return to stock transactions.	Full	In-Scope	
INV-80	Must support random storage approach for maximum space utilization	Fit	System supports multiple storage location approach	System supports multiple storage location approach.	Full	In-Scope	
INV-81	Must support multi level storage (Aisle, Row, Rack, Bin)	Fit	System allows Storage Location be established that include a Storage Area and up to 4 levels	System allows Storage Location be established that include a Storage Area and up to 4 levels.	Full	In-Scope	

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INV-82	Must allow a single item to be stored in more than one location within a facility	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-83	Must support bulk storage areas	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-84	Must support location management to reduce the number of storage locations for a single item.	Fit	Delivered	Delivered Functionality	Full	In-Scope	
INV-85	Ability to support locations for dedicated use (i.e.. inspection, hold, quarantine, reservations, etc.)	Fit	Delivered	Delivered Functionality	Full	In-Scope	
INV-86	Ability to allow for location management (addition of new storage locations, inactivate of old storage locations)	Fit	Delivered	Delivered Functionality	Full	In-Scope	
INV-87	Must support prioritized picking based upon storage location	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-88	Must support fixed-pick storage locations	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-89	Must support Par Carts	Fit	Delivered Par Location (formerly Par Carts)	Delivered Functionality	Full	In-Scope	
INV-90	Must allow items to be moved from one storage area within a facility to another within the same facility.	Fit	Delivered	Delivered Functionality	Full	In-Scope	
INV-91	Must support inventory replenishment for all stockpiles combined or individual storage facilities	Fit	System supports replenishment per requirement. However, the Stockpile system design does not support replenishment for individual storage facility.	System supports replenishment per requirement. However, the Stockpile System design does not support replenishment for individual storage facility.	Full	In-Scope	

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INV-92	Must support the concept of Safety Stock.	Fit	System support a safety Stock quantity to be entered for each item	System support a Safety Stock quantity to be entered for each item.	Full	In-Scope	
INV-93	Must support replenishment based upon inability to satisfy existing demands (Reservations). Consider total demand and lead time.	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-94	Must have the ability to set Re-Order Point and Re-Order Quantity on an item/facility basis.	Fit	Delivered Functionality	Delivered Functionality	Full	In-Scope	
INV-95	Must automatically create replenishment requirements when the on-hand balance drops below the established Order Point	Fit	A system process must be set up to run per user defined schedule	A system process must be set up to run per user defined schedule.	Full	In-Scope	
INV-96	Must support Fixed Bin Replenishment	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-97	Must be able to automatically replenish one facility from inventory that is availability at another facility within the state system.	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-98	Must be able to run replenishment for state defined groups of items	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-99	Must provide for review and approval (and possible revision) of replenishment requisitions before they are processed.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-100	Must support Re-Order Point Range Checking as a way to reduce total ordering costs	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	

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INV-101	Ability to calculate replenishment parameters based upon transactional experience.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-102	Must support Annual Physical Inventory	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-103	Must support Cycle Counting	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-104	Must support A-B-C Classifications for determination of count frequency	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-105	Must have the ability to create counting sheets based upon individual parameters of individual items.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-106	System must provide a method to reconcile the actual count to the system count.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-107	System must calculate and report inventory accuracy over time.	Fit	Delivered report	Delivered report	Full	In-Scope	
INV-108	System must support 'blind counting' where the person performing the count does not know the expected result.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-109	System must provide for recording the count activity when no count error is found.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	

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		Fit/Gap	Solution Comment	Solution Comments/Assumptions	Solution Full/Partial	Final Requirement Scope (In Scope or Out of Scope)	Gap In-Scope & Out-of-Scope Sub-classification
INV-110	System must have ability to generate lists of items to be counted based upon item parameters	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-111	System must be able to generate count sheets based upon storage location within a given facility.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-112	System must provide an audit trail including the date/time that a count was performed and the person who did the count.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-113	System must have the ability to determine count frequency based upon unit cost and annual volume.	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-114	When an adjustment is made to the on-hand balance for an item, the system must create an appropriate accounting entry.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-115	Count data must include serial number and lot number where appropriate	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-116	Must support average costing, Standard Costing and actual costing for inventory valuation	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-117	Must have ability to report the value of inventory at any given time	Fit	Delivered report. Inventory unit cost must be established in database	Delivered report. Inventory unit cost must be established in database.	Full	In-Scope	
INV-118	Must have the ability to charge the costs of items issues to the recipient	Fit	Delivered functionality. Requires Cost Management be implemented	Delivered functionality. Requires Cost Management be implemented.	Full	In-Scope	

EE1: IVM In and Out of Scope Requirements Detail

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INV-119	Must be able to charge the costs of items to work orders	Fit	Delivered functionality. Requires Cost Management be implemented	Delivered functionality. Requires Cost Management be implemented.	Full	In-Scope	
INV-120	Must be able to track the value of inventory when items are transferred between facilities	Fit	Configuration. Requires unit costs be established	Configuration. Requires Unit costs be established.	Full	In-Scope	
INV-121	Must be able to associate costs with every inventory transaction that can occur within the system.	Fit	Configuration. Requires unit costs be established	Configuration. Requires unit costs be established.	Full	In-Scope	
INV-122	Must support reservations (support for future demands)	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-123	Must provide support for backorder demand processing	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-124	Must support adjustments to demand lines over time	Fit	Delivered functionality. Demand Lines must be in 'unfulfilled' or 'unreserved' status	Delivered functionality. Demand Lines must be in 'unfulfilled' or 'unreserved' status.	Full	In-Scope	
INV-125	Must have the ability to process orders based upon priorities that support reservations	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-126	Must have the ability to streamline the issue process when conflicting demand does not exist.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-127	Must be able to report against the status of orders in the fulfillment process.	Fit	Delivered report	Delivered report	Full	In-Scope	

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INV-128	Ability to generate Pick Documentation that has the ability to guide the work of warehouse employees. The documentation should include Item Number, Quantity, Lot Number, Serial Number, Storage Location and accounting details.	Fit	Delivered functionality using the multi-step fulfillment process	Delivered functionality using the multi-step fulfillment process	Full	In-Scope	
INV-129	System should allow automated processing of demand lines when specific conditions exist.	Fit	Delivered functionality using the multi-step fulfillment process	Delivered functionality using the multi-step fulfillment process	Full	In-Scope	
INV-130	System must allow rule based backorder (Shortage) processing.	Fit	Delivered functionality using the multi-step fulfillment process	Delivered functionality using the multi-step fulfillment process	Full	In-Scope	
INV-131	System must be able to create shipping documentation including Packing Lists and Bills of Lading	Fit	Delivered Reports	Delivered Reports	Full	In-Scope	
INV-132	The system must support Lot Controlled items with or without expiration dates	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-133	The system must have the ability to track and control Serialized items.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-134	The system must have the ability to track and manage items by staged dates.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-135	The system must prevent issuance and/or usage of expired lots -	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-136	The system must perform edits to insure that serial numbers are valid before a transaction is accepted by the system.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	

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INV-139	The system must support a variety of inventory costing approaches including Average Costing, Standard Costing and Actual Costing.	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-140	When items are moved between operational units with different accounting rules, the system must be able to create appropriate variance entries.	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-141	The system must be able to track scrap and obsolescence costs.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-143	System must have the ability to track and manage owned as well as non-owned items.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-144	System must have the ability to track and manage consigned items.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-145	System must be able to track and report incoming inspection results against Item Numbers	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-146	System must be able to track and report price changes and prices paid over time for individual Item numbers.	Fit	Delivered functionality	Delivered functionality	Full	In-Scope	
INV-200	Ability to alternatively name inventory items to support an external categorization (e.g. FEMA standardized terminology)	Fit	Item description field is free text	Delivered functionality Item description field is free text	Full	In-Scope	
INV-201	Item naming convention needs to be generally understandable	Fit	Item description field is free text	Delivered functionality Item description field is free text	Full	In-Scope	
INV-202	Ability to interface with DLAN (Disaster Local Area Network)	Gap	This requirement is the same as Requirement INV-204	PO: Use free form field provided on handheld	Full	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)

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INV-203	Ability to interface with FEMA system	Gap	A field, labeled 'FEMA No.' will be added to the Express Issue page. A field, labeled 'FEMA No.' will be added to the Issue transaction entry screen on the handheld unit.	PO: Use free form field provided on handheld	Full	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)
INV-204	Ability to interface with ICS (Incident Management System)	Gap	A field, labeled 'DLAN No.' will be added to the Express Issue page. A field, labeled 'DLAN No.' will be added to the Issue transaction entry screen on the handheld unit	PO: Use free form field provided on handheld.	Full	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)
INV-205	Ability to map existing identifiers from legacy system into SFS	Fit	PeopleSoft allows the upload from an external source. Data source, data target and data mapping must be defined.	PeopleSoft allows the upload from an external source. Data source, data target and data mapping must be defined.	Full	In-Scope	
INV-206	Capability to synchronize additions/deletions/status changes/location changes into Inventory from external system (e.g. FEMA, SAMS-Z, PBUS-E)	Fit	Items can be added, modify and item status can be changed using the online pages to match other systems as desired.	Delivered functionality	Full	In-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-207	Ability to convert in defining attributes of data from legacy system (ACTION ITEM: OMH01 & DMN01 providing details from current system)	Gap	PeopleSoft allows the upload from an external source. Data source, data target and data mapping must be defined.	PO: One-time data conversion will map legacy fields to delivered, standardized, in-scope fields.	Full	Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-208	Ability to maintain inventory by size attribute (e.g. Clothing)	Fit	An Item ID can be established for each size	Delivered functionality	Full	In-Scope	
INV-209	Ability to track who has been issued material and who has returned material to support individual accountability	Fit	A query report can be developed to list issue recipient and when equipment was returned.	A query report can be developed to list issue recipient and when equipment was returned.	Full	In-Scope	
INV-210	Ability to forecast demand and minimum inventory levels	Fit	Delivered process can calculate demand and reorder point using the replenishment parameters established	Delivered functionality	Full	In-Scope	
INV-211	Ability to support maintenance execution on planned and unplanned maintenance including tracking activity, date, performer.	Gap	Existing custom page on 9.0 can be used to enter and record maintenance performed.	PeopleSoft Maintenance Management must be implemented to fully meet requirement.	Partial	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)

EE1: IVM In and Out of Scope Requirements Detail

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		Fit/Gap	Solution Comment	Solution Comments/Assumptions	Solution Full/Partial	Final Requirement Scope (In Scope or Out of Scope)	Gap In-Scope & Out-of-Scope Sub-classification
INV-212	Ability to track who added/modified/inactivate a record (Accountability audit record)	Fit	Username is recorded for all inventory transactions	Delivered functionality .	Full	In-Scope	
INV-213	Not allow configuration or transactions to be deleted without proper security	Fit	Configuration pages cannot be accessed without the proper security role. Saved transactions cannot be modified.	Delivered functionality .	Full	In-Scope	
INV-214	Ability to accept inputs and review information from non-PC based devices (e.g. smart phones, tablets)	Gap	Existing 9.0 process can be used to process the transactions file received from the hand held unit	Existing 9.0 process can be used to process the transactions file received from the hand held unit.	Partial	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)
INV-215	Ability to identify, based on user-defined business rules, if a new item being added to the system requires GPS tracking unit	Gap	Business process must be defined on this requirement.	Business process must be defined on this requirement.		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-216	Have the ability to record upon issuance of an item that the credentials of the issue were validated.	Gap	Dependency upon approval of requirement INV-25	Dependency upon approval of requirement INV-25.		Out-of-Scope	10 Duplicate Requirement (Gap Out-of-Scope)
INV-217	Ability to classify, inventory, track and deploy consigned equipment	Fit	Delivered functionality can classify item as consigned. A supplier must be established.	Delivered functionality .	Full	In-Scope	
INV-218	Ability to classify inventory with the status of "surplus"	Fit	A Storage Location can be established within the Stockpile to store Surplus inventory	Delivered functionality.	Full	In-Scope	
INV-219	Ability to classify inventory as "surplus" via workflow at multiple levels (e.g. At the agency and OGS01)	Gap	Delivered PeopleSoft Inventory does not include workflow to classify inventory items. A Storage Location can be established to store Surplus items.	No workflow, use Location to indicate "Overstock"	Partial	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)

EE1: IVM In and Out of Scope Requirements Detail

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	Statewide Requirement Description	Fit/Gap	Solution Comment	Solution Comments/Assumptions	Solution Full/Partial	Final Requirement Scope (In Scope or Out of Scope)	Gap In-Scope & Out-of-Scope Sub-classification
INV-220	Ability for inventory classified as "surplus" to be visible statewide	Gap	State Application security design limits access to user accessibility.	PO: Discussion on "Surplus" v. "Overstock" needed.	Partial	Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-221	Ability for inventory classified as "surplus" to be requested for transfer	Fit	Surplus Inventory can be deployed while in Inventory	Delivered functionality .	Partial	In-Scope	
INV-222	Ability for inventory classified as "surplus" to be disposed of	Fit	An Express Issue transaction can be performed. Entered the disposal site as the Ship To Customer field.	Delivered functionality .	Full	In-Scope	
INV-223	Approval for disposal of inventory via workflow at multiple levels (e.g. At the agency and OGS01)	Gap	Delivered PeopleSoft Inventory does not include workflow to classify inventory items.	Delivered PeopleSoft Inventory does not include workflow to classify inventory items.		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-224	Ability to request approval from OGS01 for inventory to be surpluses or disposed of (e.g. CS201 form)	Gap	Delivered PeopleSoft Inventory does not include workflow to classify inventory items.	Delivered PeopleSoft Inventory does not include workflow to classify inventory items.		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-225	Ability to designate inventory as functionally obsolete	Fit	A Storage Location can be established within the Stockpile and inventory status type be set as Obsolete.	A Storage Location can be established within the Stockpile and inventory status type be set as Obsolete.	Full	In-Scope	
INV-226	Allow disposal of inventory when inventory is functionally obsolete	Fit	An Express Issue transaction can be performed. Enter the disposal site as the Ship To Customer field.	An Express Issue transaction can be performed. Enter the disposal site as the Ship To Customer field.	Full	In-Scope	
INV-227	Ability to capture the useful life of an item	Fit	Assuming that this is referring to Lot controlled item - the expiration date can be captured.	Assuming that this is referring to Lot controlled item - the expiration date can be captured.	Full	In-Scope	

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INV-228	Ability to confirm disposal of the inventory	Gap	Delivered PeopleSoft Inventory does not include workflow to classify inventory items.	Delivered PeopleSoft Inventory does not include workflow to classify inventory items.		Out-of-Scope	9 Contrary to Best Practice Design (Gap Out-of-Scope)
INV-229	Ability to add items to inventory outside of the procurement process	Fit	An Express Put away transaction can be performed to update the inventory balance	An Express Put away transaction can be performed to update the inventory balance	Full	In-Scope	
INV-230	Ability for system to update on hand balance based up on receipt of items	Fit	Inventory balance is updated after the Put away process is complete	Delivered functionality	Full	In-Scope	
INV-231	Ability to issue item out of inventory	Fit	Delivered functionality allows the issue of items up to the available quantity in inventory	Delivered functionality System allows the issue of items up to the available quantity in inventory.	Full	In-Scope	
INV-232	Ability to capture personally identifiable information for individuals issued items out of inventory	Fit	Information can be entered in the Sold To Customer field	Delivered functionality	Full	In-Scope	
INV-233	Ability to return item to alternative location than where it was issued	Fit	Items can be received at alternative location	Delivered functionality	Full	In-Scope	
INV-234	Identify a return due date when an item is past due based on business rules	Fit	Delivered functionality when the Create/Update Stock Request page is used to issue items. The Return Date is an optional field on the Comments page.	Delivered functionality	Full	In-Scope	
INV-235	Ability to issue the first expiration dated items first upon issue of inventory,	Fit	Delivered functionality allows the ability to issue items by earliest expiration date (FEFO)	Delivered functionality	Full	In-Scope	
INV-236	Ability for automatic notification to initiate transfers of inventory items when not level (i.e. Inventory leveling)	Gap	Query report can be used to view inventory balances.	PO: Out-of-scope - The essence of the requirement can be fulfilled with current tools.	Full	Out-of-Scope	9 Contrary to Best Practice Design (Gap Out-of-Scope)

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INV-237	Ability to automatically or manually update status of consumable item with approaching expiration date so others can request swap	Fit	Delivered Inventory Status page can be used to update item status	Delivered Inventory Status	Full	In-Scope	
INV-238	Ability to report by Expiration Date Range	Fit	Delivered report INSS450 list all items and its expiration dates. Custom Query report NY_INV_DIM_LOT_EXPIRATION_DATE has also been developed	Delivered report INSS450 list all items and its expiration dates. Custom Query report NY_INV_DIM_LOT_EXPIRATION_DATE has also been developed.	Full	In-Scope	
INV-239	Ability to purchase equipment with Federal Funding and identify it thru the funding source.	Fit	This is a delivered PeopleSoft Purchasing functionality, part of the existing core solution, and not part of the EE1 scope per Charter.	This is a delivered PeopleSoft Purchasing functionality	Full	Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-240	Support Federal Grant audit with a report of inventory assets purchased with Federal Money from that grant.	Gap	A report may be developed to list Item Procurement funding source. Purchase Orders will have to reference Item id	A report may be developed to list Item Procurement funding source. Purchase Orders will have to reference Item id.		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-241	We also have the need to search for inventory items purchased related to a federal grant.	Fit	Business Process Policy should state that all Inventory purchase must be made with a Purchase Order	Business Process Policy should state that all Inventory purchase must be made with a Purchase Order.	Full	In-Scope	
INV-242	Any Inventory Item designated as a capital asset must be transferred by OGS	Gap	AM Requirement	This may be moved to the Asset Management Module	Full	Out-of-Scope	7 Charter - Outside of Charter Scope (Gap Out-of-Scope)
INV-243	Ability to record physical transferred items with changing ownership, excluding capitalized equipment from one agency to another agency in and out of an emergency	Fit	Emergency Inventory system assumes that items do not change ownership. Physical possession and ownership are two different things. Emergency Inventory deals with physical possession.	Emergency Inventory system assumes that items do not change ownership. Physical possession and ownership are two different things. Emergency Inventory deals with physical possession.	Partial	In-Scope	

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INV-244	Ability to track an Inventory Item total Quantity including items that have been deployed and not returned.	Gap	An Inventory Balance query report listing all deployed items along with returned date will be developed	Met by existing 9.0 query.	Full	In-Scope	5 New Enhancement - Report Solution (Gap In-Scope)
INV-245	Ability to report Inventory by Item type, Item, Location, Total Quantity, In Stock, Total deployed, Total Returned at Summary and Detail level	Gap	A Query report will be created listing the required information. This report can be run using PeopleSoft Query Viewer	A Query report will be created listing the required information. This report can be run using PeopleSoft Query Viewer	Full	In-Scope	5 New Enhancement - Report Solution (Gap In-Scope)
INV-246	Ability to record Incident # (e.g. Last four of FEMA #) upon issue and report on	Gap	This requirement is the same as Requirement INV-203	This requirement is the same as Requirement INV-203	Full	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)
INV-247	Ability to run an ad hoc report on custom maintenance pages including the memo field	Fit	A Query report will be created listing the required information. This report can be run using PeopleSoft Query Viewer	A Query report will be created listing the required information. This report can be run using PeopleSoft Query Viewer	Full	In-Scope	
INV-248	Ability for non-SFS user to record their identifying information and to use scanner to collect Inventory data (Name, Unit/Organization/Assignment), collect Guest log-in information	Gap	Covered under business process policy	Continue to use existing 9.0 handheld business process	Full	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)
INV-249	Ability to validate collected data (Driver ID), identify associated info for user using the scanner	Gap	Software on the Hand Held must be enhanced to include login security validation.	Software on the Hand Held must be enhanced to include login security validation.		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-250	Ability to sync handheld user information and guest authentication authorization from scanner back to system	Gap	Software on the Hand Held must be enhanced to include login security validation. The hand held transaction file must be modify to include collected information to validate user at sync time.	Software on the Hand Held must be enhanced to include login security validation. The hand held transaction file must be modify to include collected information to validate user at sync time.		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)

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INV-251	One or more users will have ability to view Storehouse information across the board; act upon across the board	Fit	User account profile access will be created to meet user needs	User account profile access will be created to meet user needs.	Full	In-Scope	
INV-252	One or more users will have ability to view individual Storehouse information across individual Storehouse; act upon individual Storehouse	Fit	User account profile access will be created to meet user needs	User account profile access will be created to meet user needs.	Full	In-Scope	
INV-253	Ability to activate/deactivate a handheld unit remotely	Gap	A business process must be defined to instruct hand Held unit support staff to activate/deactivate unit remotely.	A business process must be defined to instruct Hand Held unit support staff to activate/deactivate unit remotely.		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-254	Ability to Inventory into a Reserved (Layaway) status	Fit	Item or Item quantity can be placed on HOLD status	Item or Item quantity can be placed on HOLD status.	Full	In-Scope	
INV-255	Ability to load scanning software enterprise wide	Gap	A business process must be defined to instruct hand Held unit support staff to update software remotely.	A business process must be defined to instruct hand Held unit support staff to update software remotely.		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-256	Ability to have multiple Ship To Locations also be classified as an Inventory Storage Location (Area)	Fit	System allows any physical address be established as a Ship To Location	System allows any physical address be established as a Ship To Location	Full	In-Scope	
INV-257	Ability to setup Storage Location as a temporary location	Fit	Configuration	Satisfied via Configuration	Full	In-Scope	
INV-258	Ability to only issue in full Qty needed or issuing in partial Qty	Fit	Delivered	Delivered functionality	Full	In-Scope	
INV-259	Provide a put away function that can be entered through the handheld scanner	Gap	Barcode software will be developed to include a receiving functionality	PO: Carry forward a 9.0 customization	Full	In-Scope	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)

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INV-259-A	Cycle counting integration with handheld devices	Gap	A new transaction function will need to be created and added to the software on the hand held unit	A new transaction function will need to be created and added to the software on the hand held unit.		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
INV-260	Ability to capture asset details for GIS needs (e.g. equipment coordinates)	Fit	Delivered PS AM supports GIS integration. This is out-of-scope per the EE1 project charter	Delivered PS AM supports GIS integration. This is out-of-scope per the EE1 project charter		Out-of-Scope	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)
	Key for Column H Codes:						
	1 Partially Met, Delivered Only (Gap In-Scope)						
	2 Retrofit 9.0 Custom As-Is (Gap In-Scope)						
	3 Retrofit 9.0 Custom with Change (Gap In-Scope)						
	4 New Enhancement - Gap Solution (Gap In-Scope)						
	5 New Enhancement - Report Solution (Gap In-Scope)						
	6 Charter - Met by Post-EE1 Module (Gap Out-of-Scope)						
	7 Charter - Outside of Charter Scope (Gap Out-of-Scope)						
	8 Analytical Report - Data Warehouse (Gap Out-of-Scope)						
	9 Contrary to Best Practice Design (Gap Out-of-Scope)						
	10 Duplicate Requirement (Gap Out-of-Scope)						
	11 Risk/Reward Project Officer Decision (Gap Out-of-Scope)						