

EE1: IM In Out of Scope Requirements Detail

	Requirement Description	PS Fit/Gap		Recommended Solution		Scope	
Requirement ID	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
IM-1	Ability to define descriptions using industry 'Best Practice' in the following general format: Noun, Descriptor 1, Descriptor 2, Descriptor 3 where the descriptors are listed in the order of significance.	FIT	Best Practice'	This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-2	Item Numbers will be assigned based upon 'form, fit & Function'. If two items share an identical 'form, fit & Function', then those items will share a common NYS Item ID	FIT	Best Practice'	This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-3	Item Numbers will be assigned on a sequential basis and will not have any additional information coded into the number.	Fit	Best Practice'	This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-4	The Item Numbers assigned must be available to users across the entire system	Fit	Best Practice'	This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-5	Every item will be associated with a set of attributes that completely define the item.	Fit	Best Practice'	This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-6	The Item Number creation process will have approval steps so that a review and approval is required before the Item Number is used at NYS.	Fit	This requirement does not include workflow	Creation and Maintenance of the Item Master is centralized. The Item Master Team will be the only people who have the capability to change the status of an Item to Active. This requirement does not include workflow.	Full	In Scope	
IM-7	System should record approval activity including acceptance and denial of new Item Numbers including the NYS employees who took the action as well as the date/time of the action	Fit		This functionality exists in PS when the request for the new Item ID is initiated from within the ePro Requisition.		Out of Scope	

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IM-8	The system should allow the status of an item to be changed over time based upon the requirements of NYS. Statuses must include Active, Inactive, Discontinued and Hold	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-9	The actions that are permissible to be performed on an item must be based upon the status of the item.	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-10	Ability to future date Item Status changes so that the entry can be made to the system as soon as the need for a change becomes known.	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-11	Ability to use prompting that is based upon the transaction being performed as well as the Item Number and the status of the item. If an item is not eligible to be included in the transaction type, the system should not show the item in the prompt list.	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-12	Ability to acquire a single NYS item from a variety of suppliers.	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-13	Ability to associate a single item with more than one manufacturer and manufacturer's item number. The system must accommodate this requirement.	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-14	Ability to capture a vendor specific UOM and packaging	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-15	Ability to provide transactional history of all activity against a specific item.	Fit	The Item ID is the key to the data but the transactional records are actually entered and stored in other modules (i.e.. Purchasing, Inventory)	Creation of the Item Master makes this capability possible because the Item ID is the key to the data but the transactional records are actually entered and stored in other modules (i.e.. Purchasing, Inventory)	Full	In Scope	

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IM-16	Ability to validate future entries against the list when an Items have already been created	Fit		Once a specific Item ID has been assigned, the system will not allow that Item ID to be assigned to another item. The system imposes this restriction when Item IDs are manually assigned as well as when they are automatically assigned by the system.	Full	In Scope	
IM-17	Ability to inactivated an item when the useful life of the item is past.	Fit		The Item Master Team can change the status of any item in the system.	Full	In Scope	
IM-18	Ability to restrict the action to order Item #'s across the State.	Fit	This assumes that the intent of the requirement is to limit the ability of un-authorized people from ordering restricted items (i.e.. guns, ammo). This requirement is met through the use of Catalogs in PeopleSoft.	This assumes that the intent of the requirement is to limit the ability of un-authorized people from ordering restricted items (i.e.. guns, ammo). This requirement is met through the use of Catalogs in PeopleSoft.	Full	In Scope	
IM-19	Ability to phase out inventory when item numbers are retired. Assist 'use up' of old items	Fit	Statuses are maintained in the Item Master but restrictions regarding use are actually imposed in transactional modules (i.e., Purchasing and Inventory)	Statuses are maintained in the Item Master but restrictions regarding use are actually imposed in transactional modules (i.e., Purchasing and Inventory). The types of transactions that are allowed for an item are limited based upon item status.	Full	In Scope	
IM-25	Ability to store images and/or documents related to specific Item numbers (drawings, data sheets etc.). Add to Vendor Item Level if appropriate (e.g. Assembly Instructions)	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	

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IM-26	Ability to allow changes to the Item over time using effective dating so that the details of changes are retained including who performed the change, the date/time of the change and the exact nature of the change.	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-27	Ability to associate MSDS numbers and the MSDS status of every item.	Fit	PS stores MSDS numbers. What does MSDS Status mean?	Material safety data sheet (MSDS). Does this item require MSDS? MSDS sheets get updated. PS stores MSDS numbers but does not store a revision number for the document. It does not include a checkbox to indicate that an MSDS number is required.	partial	In Scope	
IM-28	Ability to record costs associated with item numbers including purchased price.	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-32	Ability to search for Item Numbers based upon a statewide defined set of attributes including, but not limited to Description, Vendor, Vendor Item Number, Manufacturer and Manufacturer's Item Number	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-33	Item master project must coordinate with the existing Catalog effort	Fit		This is actually a requirement for the conduct of the EE1 project rather than for the capabilities of the system. A commitment has been made by the EE1 Project Team and by the Marketplace Initiative Team to coordinate our activities.	Full	In Scope	
IM-34	System must be able to Classify Items in A-B-C classifications for cycle counting	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	

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IM-35	Ability of the system to suggest alternative substitute items when appropriate.	Fit		This is a 'Best Practice' which is included in delivered PeopleSoft	Full	In Scope	
IM-36	Ability for the system to determine the priority of their use, If an item has more than one substitute,	Gap		In the Fit/Gap Review sessions, the team present indicated that this is not a requirement.		Out of Scope	
IM-37	Ability to manage items in internal Catalogs as an additional way to categorize things and to control access and usage.	Fit	PS provides dynamic capabilities related to catalogs but the implementation of catalogs will depend upon the coordination with the MarketPlace Initiative Team.	Must coordinate with the existing Catalog effort	Full	In Scope	
IM-38	Ability to include a single item in multiple internal catalogs.	Fit	This is a 'Best Practice' which is included in delivered PeopleSoft	Must coordinate with the existing Catalog effort	Full	In Scope	
IM-39	Ability to process files received from vendors. These files will be used to update Item information and statuses.	Fit	PS has Excel to CI capabilities but a decision has been made that capability will not be used with the Item Master. The team at the Fit/Gap session understood and agreed with this decision.	If in scope, must coordinate with the existing Catalog effort		Out of Scope	
IM-40	Ability to use Item Numbers for items that are to be processed through inventory as well as those that aren't.	Fit		Creation of the Item Master makes this capability possible because the Item ID is the key to the data but the transactional records are actually entered and stored in other modules (i.e.. Purchasing, Inventory)	Full	In Scope	

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IM-45	Ability to track and report RTV activity against individual Item Numbers.	Fit	This is a 'Best Practice' which is included in delivered PeopleSoft	**Pass requirement onto Purchasing group**	Full	In Scope	
IM-46	Ability to track and report delivery performance against individual Item Numbers.	Fit	This is a 'Best Practice' which is included in delivered PeopleSoft	**Pass requirement onto Purchasing group**	Full	In Scope	
IM-47	The system should support workflow for the Item Approval process. Workflow initiates within an agency, routes for approval, then routes to control agency for approval.	Gap	Item Creation is initiated and implemented within a very small group of people, all of whom work in the same office in OGS. The team agreed that this workflow is not required.	If in scope notification of routing for approval pending defined process		Out of Scope	
IM-201	Ability to identify Items that require special licensing/Warning, e.g. Pesticides.	Gap		Possibility of creating a catalog for ordering pesticides and limit access via security. Nice to have	partial	In Scope	
IM-202	Ability to assign item numbers to pharmaceuticals and narcotics for future integration into the inventory process.	Gap	Based upon discussion, the group determined there is no need to track narcotics and pharmaceuticals through the inventory process.	Based upon discussion, the group determined there is no need to track narcotics and pharmaceuticals through the inventory process.		Out of Scope	
IM-203	Every item will capture at a minimum, MWBE (Minority & Women Business Enterprise), preferred source and NYS product/company.	Gap		B2G (Business 2 government) Included in Marketplace for items from Marketplace.		Out of Scope	

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IM-204	Ability to request an Item be added to the Item Master outside of the procurement process.	Fit	Cover through NYS Policy	Cover through NYS Policy	Full	In Scope	
IM-205	Ability for system to do Mass update to Item Master	Fit	Provide Excel to CI capability to update the Item Master		Full	Out of Scope	
IM-206	Ability for an Agency to add agency specific notes to an Item, viewable only by that agency; Controlled comment edit access.	Gap	PS allows attachments to Items but cannot restrict access to those comments to specific agencies. If an employee can view or update Items, they will be able to view or change all notes associated with the item regardless of their agency.	Meet the need via policy. Nice to have. Ability to use comments on Requirement/PO and have it not visible to the vendor exists	Partial	In 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)						