

Inventory:

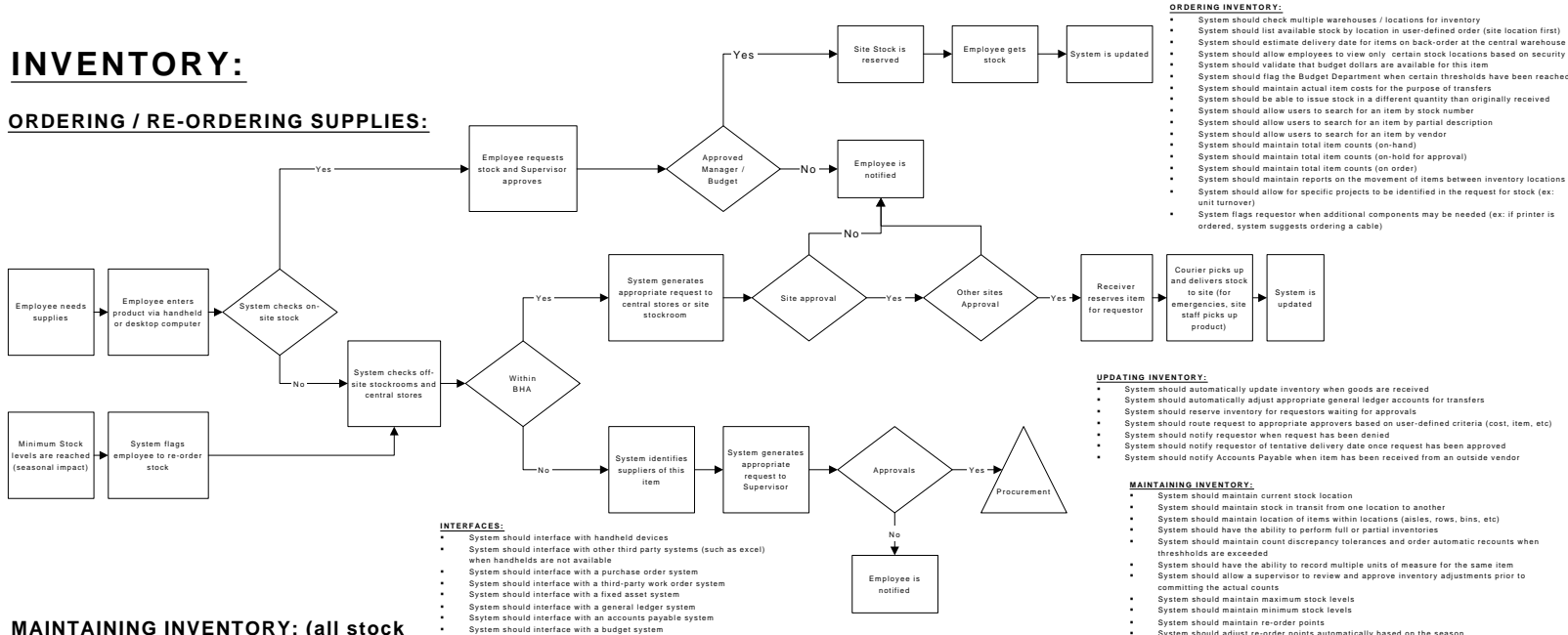
Overview

Currently, the BHA maintains one centralized warehouse for the most often ordered supplies. The value of this warehouse is approximately \$500,000 with monthly transaction volume of \$150,000. The inventory stocked in this warehouse is maintained in a computer system, which is not accessible to other BHA staff. Many departments and developments also maintain individual supply rooms and/or closets. Because this inventory is expensed to the department or development when issued, this inventory is maintained outside of the central inventory or not at all. Our redesigned process focuses on giving BHA staff access to reviewing the availability of stock and the lead time needed to acquire out of stock items. Our process also focuses on providing a method of maintaining counts for stock, which has already been expensed.

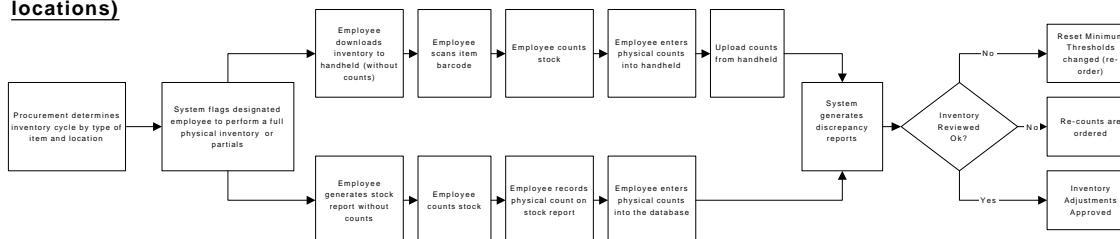
Future Workflow Process Maps:

INVENTORY:

ORDERING / RE-ORDERING SUPPLIES:



MAINTAINING INVENTORY: (all stock locations)



No.	Process	Requirement Description	P*	Comments
1.	Maintaining Inventory:	System should maintain current stock location	1	
2.	Maintaining Inventory:	System should maintain stock in transit from one location to another	2	
3.	Maintaining Inventory:	System should maintain location of items within locations (aisles, rows, bins, etc)	1	
4.	Maintaining Inventory:	System should have the ability to perform full or partial inventories	1	
5.	Maintaining Inventory:	System should maintain count discrepancy tolerances and order automatic recounts when thresholds are exceeded	2	
6.	Maintaining Inventory:	System should have the ability to record multiple units of measure for the same item	2	
7.	Maintaining Inventory:	System should allow a supervisor to review and approve inventory adjustments prior to committing the actual counts	2	
8.	Maintaining Inventory:	System should maintain maximum stock levels	1	
9.	Maintaining Inventory:	System should maintain minimum stock levels	1	
10.	Maintaining Inventory:	System should maintain re-order points	1	
11.	Maintaining Inventory:	System should adjust re-order points automatically based on the season	2	
12.	Maintaining Inventory:	System should maintain subsidiary inventories of items which have already been expensed to the department or development (ex: office supplies maintained by a department; cleaning supplies for a maintenance shop)	1	
13.	Maintaining Inventory:	System should track shelf life of an item and flag supervisor when product should be removed	3	
14.	Maintaining Inventory:	System should automatically generate replenishment request to approved suppliers when user-defined thresholds are reached	3	
15.	Maintaining Inventory:	System should maintain item usage reports for the purpose of determining re-order points	1	

Legend:

P*riority	1 = Mandatory	2 = Important	3 = Nice to Have
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No.	Process	Requirement Description	P*	Comments
16.	Maintaining Inventory:	System should allow physical inventory counts to be uploaded from a handheld	3	
17.	Maintaining Inventory:	System should allow physical inventory counts to be uploaded from third party applications	3	
18.	Maintaining Inventory:	System should allow ad hoc reporting around all inventory items and transactions	1	
19.	Maintaining Inventory:	System should maintain discrepancies between stock issued and stock received	1	
20.	Maintaining Inventory:	System should allow stock numbers to be alpha-numeric	1	
21.	Maintaining Inventory:	System should allow stock numbers to be a user-defined length	2	
22.	Maintaining Inventory:	System should track failure rates of user-defined products	3	
23.	Maintaining Inventory:	System should maintain user-defined information (notes fields) for each item	3	
24.	Maintaining Inventory:	System should maintain preferred vendor information	3	
25.	Maintaining Inventory:	System should maintain vendor stock number if applicable	1	
26.	Updating Inventory:	System should automatically update inventory when goods are received	1	
27.	Updating Inventory:	System should automatically adjust appropriate general ledger accounts for transfers	1	
28.	Updating Inventory:	System should reserve inventory for requestors waiting for approvals	2	
29.	Updating Inventory:	System should route request to appropriate approvers based on user-defined criteria (cost, item, etc)	2	
30.	Updating Inventory:	System should notify requestor when request has been denied	2	
31.	Updating Inventory:	System should notify requestor of tentative delivery date once request has been approved	2	
32.	Updating Inventory:	System should notify Accounts Payable when item has been received from an outside vendor	1	

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No.	Process	Requirement Description	P*	Comments
33.	Updating Inventory:	System should automatically calculate maximums and minimums based on actual usage by warehouse	2	
34.	Updating Inventory:	System should prompt user when actual usage fluctuates within a user-defined percentage of set maximums and minimums. User should adjust maximums and minimums manually	2	
35.	Updating Inventory:	System should allow user to exclude specific stock issues from automatic maximum and minimum calculation (ex: one time orders for a specific project – the binders for the Needs Assessment)	3	
36.	Ordering Inventory:	System should check multiple warehouses / locations for inventory	2	
37.	Ordering Inventory:	System should list available stock by location in user-defined order (site location first)	1	
38.	Ordering Inventory:	System should estimate delivery date for items on back-order at the central warehouse	3	
39.	Ordering Inventory:	System should allow employees to view only certain stock locations based on security	2	
40.	Ordering Inventory:	System should validate that budget dollars are available for this item	1	
41.	Ordering Inventory:	System should flag the Budget Department when certain thresholds have been reached	1	
42.	Ordering Inventory:	System should maintain actual item costs for the purpose of transfers	2	
43.	Ordering Inventory:	System should be able to issue stock in a different quantity than originally received	2	
44.	Ordering Inventory:	System should allow users to search for an item by stock number	1	
45.	Ordering Inventory:	System should allow users to search for an item by partial description	1	
46.	Ordering Inventory:	System should allow users to search for an item by vendor	1	
47.	Ordering Inventory:	System should maintain total item counts (on-hand)	1	

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No.	Process	Requirement Description	P*	Comments
48.	Ordering Inventory:	System should maintain total item counts (on-hold for approval)	2	
49.	Ordering Inventory:	System should maintain total item counts (on order)	1	
50.	Ordering Inventory:	System should maintain reports on the movement of items between inventory locations	2	
51.	Ordering Inventory:	System should allow for specific projects to be identified in the request for stock (ex: unit turnover)	1	
52.	Ordering Inventory:	System flags requestor when additional components may be needed (ex: if printer is ordered, system suggests ordering a cable)	3	
53.	Interfaces:	System should interface with handheld devices	2	
54.	Interfaces:	System should interface with other third party systems (such as excel) when handhelds are not available	2	
55.	Interfaces:	System should interface with a purchase order system	1	
56.	Interfaces:	System should interface with a third-party work order system	2	
57.	Interfaces:	System should interface with a fixed asset system	1	
58.	Interfaces:	System should interface with a general ledger system	1	
59.	Interfaces:	System should interface with an accounts payable system	1	
60.	Interfaces:	System should interface with a budget system	1	

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