**Purchase Management System -BRD**

**1.Executive Summary:**

The purchase management system aims to streamline and automate the process of handling purchase requisitions, approvals and procurement activities within the organization. The system ensures transparency, efficiency and accountability minimizing errors and delays in managing purchase requests. It will support employee, managers and procurement officers in their respective role**s.**

**2.Objectives:**

1. Enable employees to submit detailed, categorized purchase requisitions
2. Provide managers and procurement officers with tools for efficient approval and communication
3. Ensure real-time tracking and notification updates on requisitions
4. Standardize and optimize procurement workflows to reduce turnaround
5. Maintain a comprehensive audit trail for compliance and reporting

**3.Scope**

1. Purchase Requisition form submission and categorization
2. Approval workflows for managers and procurement officers
3. Notification system for updates (approval, rejection, or additional information)
4. Real-time tracking of requisition status
5. Document management for attaching relevant files
6. Dashboard and reporting tools for all users

**4.Out-Of-Scope**

1. Vendor Selection and onboarding
2. Inventory management integration
3. Budget forecasting and allocation tools beyond requisition-level budgeting

**5.Stakeholders**

* **Employees-** Submit and track purchase requisitions
* **Mangers:** Approve, reject or request additional details for requisitions
* **Procurement Officers:** Finalize approvals and execute procurement tasks
* **Finance Team:** Monitor budget adherence and reporting
* **Inventory/Receiving Team:** Manages the delivery
* **Vendors:** Provide quotations and delivers the purchase
* **IT Team:** Maintain and support System

**6.Functional Requirements:**

**A. Employees Features:**

**1.Requsition Submission:**

* Input details:Requisition type, item name, quantity, budget, delivery timeline, attach supporting documents
* Save drafts for incomplete requisitions

**2.Requisition Tracking:**

* View all the real-time updates
* Receive notifications for approvals, rejections, or additional information requests

**B. Manager features**

**1.Requisition Review**

* Approve or reject requisitions
* Request additional details from employee
* View Submitted supporting documents

**2.Dashboard**

* Track pending, approved, and rejected requisitions

**C. Procurement Officer Features:**

**1.Final Approval:**

* Validate requisition details and budget alignment
* Mark requisitions as completed or escalate for further review

**2.Notifications:**

* Receive alerts for requisitions awaiting procurement execution

**D. Notification System Features**

* Persistent bell icon with notifications count
* Dropdown showing recent updates with clickable links
* Dedicated notifications page for viewing all alerts

**E. Reporting and Audit**

* Generate detailed reports on requisition by type, status, and department
* Maintain an audit trail of all requisition activities

**7.Non-Functional Requirements**

**1.Performance:**

* The system should handle up to 1,000 concurrent users.
* Notifications should be sent within 2 seconds of an update.

**2.Usability:**

* Intuitive UI for all roles with minimal training required.

**3.Security:**

* Role-based access control to protect sensitive data.
* Encrypted storage for all uploaded documents.

**4.Scalability:**

* The system should scale to support future integrations (e.g., vendor management).

**8.User Stories**

**Employee User Stories:**

1. As an employee, I want to log in to the system with my credentials so that I can access the purchase requisition form.
2. As an employee, I want to select the type of requisition (office supplies, IT equipment, etc.) so that my request is categorized appropriately.
3. As an employee, I want to input details (item name, quantity, budget, delivery timeline) so that my requisition is clear and actionable.
4. As an employee, I want to attach supporting documents so that I can justify my requisition.
5. As an employee, I want to save draft requisitions so that I can revisit them later for completion.
6. As an employee, I want to submit my requisition for approval once all details are filled so that the process can move forward.
7. As an employee, I want to track requisition status so that I can stay updated.
8. As an employee, I want to receive notifications about approval, rejection, or additional information requests so that I can respond accordingly.

**Manager and Procurement Officer User Stories:**

1. As a manager, I want to view submitted requisitions so that I can review them for approval.
2. As a manager, I want to request additional details from employees so that I can ensure the requisition is justified.
3. As a procurement officer, I want to validate and finalize approved requisitions so that I can execute procurement tasks efficiently.

**Finance Team User Stories:**

1. As a finance team member, I want to review budget details for each requisition so that I can ensure compliance with financial policies.
2. As a finance team member, I want to approve or reject requisitions based on budget availability so that organizational finances remain under control.
3. As a finance team member, I want to generate detailed reports on requisition spending by department and category so that I can track and optimize financial performance.
4. As a finance team member, I want to receive notifications for requisitions requiring financial review so that I can act promptly.

**Inventory/Receiving Officers User Stories:**

1. As an inventory officer, I want to update the inventory records upon receiving items so that stock levels remain accurate.
2. As an inventory officer, I want to verify received items against the requisition so that discrepancies can be identified.
3. As an inventory officer, I want to log damaged or missing items so that they can be escalated for resolution.
4. As an inventory officer, I want to generate inventory reports so that stock movement trends can be analyzed.

**Administration/Management User Stories:**

1. As an admin/management team member, I want to monitor requisition trends and spending analytics so that I can make informed decisions about resource allocation.
2. As an admin/management team member, I want to configure user roles and permissions so that the system aligns with organizational hierarchy.
3. As an admin/management team member, I want to access the full audit trail of requisitions so that accountability is maintained.
4. As an admin/management team member, I want to view summary dashboards of requisitions and approvals so that I can assess the system's overall efficiency

**9.Acceptance Criteria**

**Employee:**

1. Employees can successfully submit a requisition with all required fields.
2. Employees can attach relevant supporting documents to their requisitions.
3. Employees can save and retrieve draft requisitions for later completion.
4. Employees receive real-time notifications about updates to their requisitions.
5. Employees can track the status and view the audit trail of their requisitions.

**Manager and Procurement Officer:**

1. Managers can view, approve, reject, or request additional details for requisitions.
2. Managers are notified of any new or pending requisitions requiring their review.
3. Procurement officers can validate and process requisitions into actionable purchase orders.
4. Procurement officers can update requisition statuses and notify stakeholders of progress.

**Finance Team:**

1. Finance team members can view and validate budget allocation details for each requisition.
2. Finance team members can approve or reject requisitions based on budget constraints.
3. Finance team members can generate detailed reports segmented by department and spending categories.
4. Finance team members receive notifications about requisitions requiring financial approval.

**Inventory/Receiving Officers:**

1. Inventory officers can update inventory levels after receiving items.
2. Inventory officers can verify received items against the original requisition.
3. Inventory officers can log and escalate any discrepancies, such as damaged or missing items.
4. Inventory officers can generate inventory movement and stock-level reports.

**Administration/Management:**

1. Admins can configure user roles and permissions within the system.
2. Admins can access a full audit trail of all requisitions, approvals, and actions taken.
3. Admins can view summary dashboards with spending and requisition trends.
4. Admins can monitor system performance and requisition efficiency through analytics dashboards.

**10.Assumptions and Constraints**

1. **Assumptions:**

* Employees have access to accurate budget and delivery timeline details.
* The system will integrate with the organization's existing authentication platform.

1. **Constraints:**

* The system must adhere to corporate security and compliance standards.
* The solution should work on desktop and mobile devices.

**11.Risks and Mitigation**

**1.Risk:** Employees may submit incomplete requisitions.

* **Mitigation:** Provide inline validation and tooltips to guide form completion.

**2.Risk:** Notifications may overwhelm users if not filtered properly.

* **Mitigation:** Allow users to customize notification preferences.

**3.Risk:** System performance may degrade with high traffic.

* **Mitigation:** Conduct load testing and implement caching mechanism

**12.Deliverables**

1. Fully functional Purchase Management System.
2. User training documentation and onboarding sessions.
3. Reports and dashboards for requisition tracking and analysis.

**13.Timeline**

|  |  |  |
| --- | --- | --- |
| **Phase** | **Duration** | **Deliverables** |
| Requirement Analysis | **2 Weeks** | Finalized BRD |
| Development | **6 Weeks** | System Prototype |
| Testing | **3 Weeks** | User Acceptance Testing |
| Deployment | **1 Week** | Go-live and post-launch support |

**14.Approval**

|  |  |  |
| --- | --- | --- |
| **Stakeholder** | **Role** | **Signature** |
| Mr.ABC | Project Sponsor |  |
| Mr.XYZ | IT Manager |  |