**Inspired – Use Cases**

**Project Name: Inspired - Inventory**

**Project ID: InsInv**

Date: 07,2014

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Revision History

| **Version** | **Date** | **Revision Description** |
| --- | --- | --- |
| .01 | 01/07/2014 | Initial draft |
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# Approvals

We have carefully assessed the Use Cases for this project. This document has been completed in accordance with the requirements of the System Development Methodology.

MANAGEMENT CERTIFICATION - Please check the appropriate statement.

\_\_\_\_\_\_ the document is accepted.

\_\_\_\_\_\_ the document is accepted pending the changes noted.

\_\_\_\_\_\_ the document is not accepted.

We fully accept the changes as needed improvements and authorize initiation of work to proceed. Based on our authority and judgment, the continued operation of this system is authorized.

(\*=Required \*\*= Submit for Review Approval Not Required)

Executive Sponsor\*\* DATE

Project Sponsor\* DATE

Quality Assurance Manager / Team Lead\* DATE

Business Analyst Manager / Team Lead\* DATE

Project Manager DATE

# Use Case List

|  |  |  |
| --- | --- | --- |
| **Use Case ID** | **Primary Actor** | **Use Cases** |
| INV.UC.1.0.0 | Inventory users, Admin | Material Master |
| INV.UC.2.0.0 | Inventory users, Admin | Category Master |
| INV.UC.3.0.0 | Inventory users, Admin | Warehouse Master |
| INV.UC.4.0.0 | Inventory users, Admin | Document Master |
| INV.UC.5.0.0 | Inventory users, Admin | Stock Details |
| INV.UC.6.0.0 | Inventory users, Admin | Miscellaneous Receipts |
| INV.UC.7.0.0 | Inventory users, Admin | Miscellaneous Issues |
| INV.UC.8.0.0 | Inventory users, Admin | Stock Transfer |
| INV.UC.9.0.0 | Inventory users, Admin | Stock Verification |
| INV.UC.10.0.0 | Inventory users, Admin | Bulk import of Temporary Items |

# Material Master

## Feature Process Flow / Use Case Model

## Use Case

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use Case ID:** | INV.UC.1.0.0 | | | |
| **Use Case Name:** | Material master page | | | |
| **Created By:** | Mahesh | | **Last Updated By:** |  |
| **Date Created:** | 01/07/2014 | | **Last Revision Date:** |  |
| **Actors:** | | Inventory users, Admin. | | |
| **Description:** | | Create or edit an item. | | |
| **Trigger:** | | This is one of the first steps in creating the items. This screen can be reached by clicking on the item details from the menu or edit/add item from the Item landing page. | | |
| **Preconditions:** | | 1. User should be authenticated user to edit or add new items. | | |
| **Post conditions:**  [Describe the state of the system at the conclusion of the use case execution. Should include both *minimal guarantees* (what must happen even if the actor’s goal is not achieved) and the *success guarantees* (what happens when the actor’s goal is achieved. | | 1. **Fail Condition:** Data should be consistent, so everything should be under one transaction so everything passes or fails together. 2. **Pass Conditions:** Create or edit the item, if the mandatory fields are not filled up then the item should have the status “Temporary” . 3. If the Group, Type, Category and Subcategory doesn’t exist already then new values should be entered into their respective master tables. 4. Various other details like    1. Item Specification    2. Currency wise cost    3. Family/parent code relationship    4. Customer wise banding    5. supplier wise details    6. Spares    7. Discount structures    8. Sales price structure    9. Alternate items    10. Item notes    11. Publish to various branches    12. Link items    13. Document upload   Should be stored in their respective tables with system generated item id as the link. | | |
| **Normal Flow:**  [Provide a detailed description of the user actions and system responses that will take place during execution of the use case under **normal, expected** conditions. This dialog sequence will ultimately lead to accomplishing the goal stated in the use case name and description. | | 1. User clicks on edit/add items menu. 2. The material master page is displayed. 3. User want to add a new item, the header contains the following details 4. Enter a new or select a group/type/category/subcategory from the list help provided. The help would list all group/type/category/subcategory already entered in the master table. 5. Enter or select a make and model number. 6. Enter an item code, the item code should be saved in capitals and should follow the configured format. 7. Enter item description, long description and remarks on the items 8. Main tab details 9. Enter Unit of Measurement. 10. Enter margin percentage, validation to check if it’s a number 11. Option to select if the stock will be handled based on Batch and/or Serial number, a combo box with options yes/no. 12. Option to select if the stock will be handled by location. 13. Select status – please have a look at alternative flows **2** 14. Enter Shelf life (Days), validation to check if it’s an integer 15. Enter barcode number 16. Enter the Ordering details like Maximum level, Minimum level, Re-Order quantity, Re-Order level, lead time – please see alternative flows **3**. 17. Enter the selling price, NETT and RRP, validation to check if it’s a number. 18. Overview of the item 19. **Branches details** 20. User modifies the details if needed for each and every branch. 21. The details that can be modified are Item Description, Item Overview, Stock By Location, Stock by batch number, Stock by Serial number and Item specification. – see alternate flow **4** 22. User selects the specification that need to be listed for the branch. 23. Spares 24. Item code, description, quantity and price should be entered. – Please see alternative flow **5**. 25. Item code and description help should be available. 26. The spares already entered for the item should be displayed in the data grid below with option to delete and update the details. If the update link is clicked, the details in the grid row is populated the text boxes above. 27. Item Specification 28. Group code, Batch number, Spec Code, Spec description, value should be entered. Group code, Batch number are non-mandatory fields. 29. The specifications already entered for the item should be displayed in the data grid below with option to delete or update the details. 30. Supplier Details 31. Supplier – help should be available based on account code and description 32. Reference number, Minimum order quantity (should contain at least one number say 0+, 10+,20+ etc, this would enable us to handle multiple quantity price structure for the same supplier), cost & notes should be entered. 33. The list of suppliers for the item and their details are displayed in the grid below. 34. Item notes/conversation 35. Supplier/Customer – help should be available based on account code and description. 36. Taken by – help should be available based on the users of the system. 37. Entry dates, notes, expiry date, open or closed flag, type of note (Internal, external, secretive). 38. The list of notes & conversation details will be displayed in the data grid. 39. Price banding 40. Bandings can be based on Group, Type, Category, Subcategory, Make and Model. It can be one or all of the above. 41. Discount in % should be entered. The discount cannot be more than 100%. 42. Expiry date, the date until which the banding should be applied. 43. The price banding structure that falls in the items criteria should be displayed in the data grid below. – Please see alternate flow **6** 44. **Packaging Details** 45. The details like Length, Width, Height, Gross weight & Nett weight of the product should be entered. 46. The user enters the number of boxes make the item, if the user choose more than one, then entries of length, width, height, gross weight and Nett weight are captured for each box. 47. The user enters the number of items in a master carton, if the number is more than one, then entries of length, width, height, gross and Nett weight of the master carton is captured. 48. Customer wise special price/banding 49. This can be based on individual customer or the pre-configured type of customers (Say trade/Retail/Web). 50. Discount in % should be entered. The discount cannot be more than 100%. 51. Expiry date, the date until which the special price should be applied. 52. Family code/ Parent code relationships 53. Parent code, Description pre-populated with the current item. If the current item already exists in a parent/family relationship either as a parent or a child then those details are displayed in the grid. 54. Child Code, Description (help provided), IN/OUT Flag, notes (shade change, Back to stock), Quantity should be entered. 55. Alternate items 56. Alternate item code, description, notes – help should be provided for item code and description. 57. Relative items     1. Alternate item code, description, notes – help should be provided for item code and description. 58. Document upload 59. Click on the save button to save the details to various tables. 60. User wants to edit an item  * User enters an item code or description or uses the item search to select the item * Clicks the ok button * The details of the items are populated in various tabs * User can edit the required details and save them  1. User want to create another item with the existing one as base  * User enters an item code or description or uses the item search to select the item * Clicks the ok button * The details of the items are populated in various tabs * User clicks on Add New button, which will blank the item code, description and barcode but leave the other details as it is.  1. User want to delete a temporary item  * User enters an item code or description or uses the item search to select the item * Clicks the ok button * The details of the items are populated in various tabs * User can click delete which would prompt the user that this particular action is irreversible. On confirmation the item details are completely deleted from all the tables. | | |
| **Alternative Flows:**  **[Alternative Flow 1 – Not in Network]** | | **1.** If group/type, category/subcategory does not exist in the master table, then the details should be saved to the master table when saving the item.  **2.** The status codes are Temporary, Active, Inactive, Discontinued, Superseded, Parent code.   1. The status “Temporary” will be there by default, once all mandatory fields are filled up then the status will no longer be available to select. 2. The maximum, minimum, re-order level can be analytically calculated based on the sales figures; this would be configurable and would be looked at after the sales module. 3. The item description, overview is pre-populated from the main details. If the stock is handled by batch number and/or serial number, then this is can be turned off in the branches, but if its not then it cant be changed in the branches. But for location, the branches can handle the stock by location even if the head office doesn’t. 4. The itemcode should be pre-populated with pre-configured format item code for spares (Say IL-IL7001-001), where the last three digits will be system generated. The item code can also be entered/selected from the help.If the item code entered doesn’t exist then a new temporary item should be created in the material master. 5. If the banding structure in the table matches with one of the group, type, category, subcategory, make or model number then the details should be displayed. The banding structure should be stored in a separate table and the price structure of the items that fall in this banding will be stored in a separate table. The order of pricing will be configurable (ie) which takes precedence, like whether the banding structure takes precedence over the customer pricing etc.   **15.** Item details should be saved with a system generated ITEMID, this item id is the one that should be used in all link and transaction tables, this would enable us to modify the item code if needed in future. | | |
| **Exceptions:** [Describe any anticipated **error conditions** that could occur during execution of the use case, and define how the system is to respond to those conditions. | | **2.** Check if the user has authorization to edit or add new items, if not then the user should be taken back to the page where they came from or to the home page with the configurable error message “You do not have access to view the page”.  **4.** If Item code already exist or if the format is wrong then when clicking save, a configurable error message should be displayed.  **General:**   * + 1. Every field validation should happen immediately after they leave the control. The error message should be displayed on the top of that tab, with an indication near the control to show that control has some validation errors.     2. Get away from popup boxes as much as possible. All message that doesn’t need a confirmation should be displayed at the top of the page or the tab. | | |
| **Includes:**  [List any other use cases that are included (“called”) by this use case. Common functionality that appears in multiple use cases can be split out into a separate use case that is included by the ones that need that common functionality. | | Authentication and Authorization use case should be catered for. | | |
| **Frequency of Use:** | | On Demand | | |
| **Notes and Issues:** | | To be Determined   1. Analytics to determine the re-order levels to be built – this can be built only after we do the sales module 2. Temporary material deletes – this can be built only after we do the purchase module. 3. Selling price calculation – need input from Anil 4. Multi currency cost calculation – need input from Anil on how it would work. Should it be cost \* currency rate or is there any other specific formula to calculate this. 5. Item specification based on batches – need input from Anil, what if both batches are in stock and an order comes which cannot be fulfilled by one batch. How the item specification should be displayed in the web. | | |

# Category Master

## Feature Process Flow / Use Case Model

## Use Case

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use Case ID:** | INV.UC.2.0.0 | | | |
| **Use Case Name:** | Group/Type/Category/Sub Category Master page | | | |
| **Created By:** | Mahesh | | **Last Updated By:** |  |
| **Date Created:** | 01/07/2014 | | **Last Revision Date:** |  |
| **Actors:** | | Inventory users, Admin. | | |
| **Description:** | | Create or edit group/type/category/sub category | | |
| **Trigger:** | | This is one of the first steps in creating the categories. This screen can be reached by clicking on the Category master page. | | |
| **Preconditions:** | | User should be authenticated user to edit or add new items. | | |
| **Post conditions:**  . | | 1. **Fail Condition:** Data should be consistent, so everything should be under one transaction so everything passes or fails together. 2. **Pass Conditions:** Create or edit the group, type, category or subcategory. | | |
| **Normal Flow:** | | 1. User clicks on the Category Master 2. The groups, types, category, subcategory already entered via material master or via the category master is listed. 3. Users have the option to delete any entries that don’t have a corresponding item associated with it. 4. Users can click on a particular row and edit the details of row. 5. Category – should be one of Group, Type, Category and Subcategory. 6. Code, description should be entered – check for duplications to make sure the description doesn’t exist for the category selected. – Please see alternate flow 6 7. Click save, the details will be inserted or updated into the category master table. | | |
| **Alternative Flows:** | | 1. A system id is generated for each row and that ID is used everywhere in the database to link it to the category. 2. If the code is not entered then a code would be generated based on the first three characters and three random numbers. | | |
| **Exceptions:** | | **1.** Check if the user has authorization to edit or add new items, if not then the user should be taken back to the page where they came from or to the home page with the configurable error message “You do not have access to view the page”.  **4.** If code already exist then when clicking save, a configurable error message should be displayed.  **General:**   1. Every field validation should happen immediately after they leave the control. | | |
| **Includes:** | | Authentication and Authorization use case should be catered for. | | |
| **Frequency of Use:** | | On Demand | | |
| **Assumptions:** | |  | | |
| **Notes and Issues:** | |  | | |

# Warehouse Master

## Feature Process Flow / Use Case Model

## Use Case

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use Case ID:** | INV.UC.3.0.0 | | | |
| **Use Case Name:** | Warehouse Master page | | | |
| **Created By:** | Mahesh | | **Last Updated By:** |  |
| **Date Created:** | 01/07/2014 | | **Last Revision Date:** |  |
| **Actors:** | | Inventory users, Admin. | | |
| **Description:** | | Create or edit a warehouse | | |
| **Trigger:** | | This is one of the first steps in inventory to create various warehouses. This page can be reached by clicking on the warehouse master link in the menu. | | |
| **Preconditions:** | | User should be authenticated user to edit or add new items. | | |
| **Post conditions:**  . | | 1. **Fail Condition:** Data should be consistent, so everything should be under one transaction so everything passes or fails together. 2. **Pass Conditions:** Create or edit the warehouses where the items are going to be stored. | | |
| **Normal Flow:** | | 1. User clicks on the Warehouse Master 2. The warehouses already entered are listed in the grid, details like Warehouse code, description, location, branch and type will be displayed. 3. Users have the option to delete any entries that don’t have a corresponding item associated with it. 4. Users can click on a particular row and edit the details of row. 5. Warehouse Code, description should be entered – check for duplications to make sure the warehouse code and description doesn’t exist. Warehouse code and description are mandatory fields. 6. Select the type of warehouse; this is a pre-configured list, e.g. Main, Returns, Repaired, Rejected, 7. Click save, the details will be inserted or updated into the warehouse master table. | | |
| **Alternative Flows:** | | A system id is generated for each row and that ID is used everywhere in the database. | | |
| **Exceptions:** | | **1.** Check if the user has authorization to edit or add new items, if not then the user should be taken back to the page where they came from or to the home page with the configurable error message “You do not have access to view the page”.  **4.** If code already exist then when clicking save, a configurable error message should be displayed.  **General:**  Every field validation should happen immediately after they leave the control. | | |
| **Includes:** | | Authentication and Authorization use case should be catered for. | | |
| **Frequency of Use:** | | On Demand | | |
| **Assumptions:** | |  | | |
| **Notes and Issues:** | |  | | |

# Document Master

## Feature Process Flow / Use Case Model

## Use Case

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use Case ID:** | INV.UC.4.0.0 | | | |
| **Use Case Name:** | Document Master page | | | |
| **Created By:** | Mahesh | | **Last Updated By:** |  |
| **Date Created:** | 01/07/2014 | | **Last Revision Date:** |  |
| **Actors:** | | Inventory users, Admin. | | |
| **Description:** | | Create or edit document type and their sequences to be used for system generation. | | |
| **Trigger:** | | This screen can be reached by clicking on the document master from the menu | | |
| **Preconditions:** | | User should be authenticated user. | | |
| **Post conditions:**  . | | 1. **Fail Condition:** Data should be consistent, so everything should be under one transaction so everything passes or fails together. 2. **Pass Conditions:** Creates document types to generate transaction number for transactions like miscellaneous receipts, issues etc. | | |
| **Normal Flow:** | | 1. User clicks on the document Master 2. The document types already entered are displayed in the table grid. Details like Applies to, Type, description, starting number, present number and status should be displayed. 3. Users have the option to delete any entries that haven’t been transacted. 4. Users can click on a particular row and edit the details of row. – Please see alternative flow 4. 5. The following fields should be entered    1. Applies To. – will be the list of transactions in inventory where a transaction number is generated. Eg. Miscellaneous receipts, issues, stock transfer and verification.    2. Type – this will be prefix for the transaction number.    3. Description – a small description about the prefix. Eg. Miscellaneous stock Receipts.    4. Starting Number – this would be the number the transaction number would start with if the above type is selected.    5. Status – Active/Inactive. User should be able to make a type inactive if that’s the only type available for the transaction. 6. Click save, the details will be inserted or updated into the document master table. | | |
| **Alternative Flows:** | | **4.** When editing the document type, fields like Applies To, Type should not be editable if the type has been transacted. If its not transacted then all the fields can be editable. The check to see if the type is transacted or not should be carried out during form load and saving.  **6** There can be more than one document type for a transaction that is active. | | |
| **Exceptions:** | | **1.** Check if the user has authorization to edit or add new items, if not then the user should be taken back to the page where they came from or to the home page with the configurable error message “You do not have access to view the page”.  **4.** If code already exist then when clicking save, a configurable error message should be displayed.  **General:**  Every field validation should happen immediately after they leave the control. | | |
| **Includes:** | | Authentication and Authorization use case should be catered for. | | |
| **Frequency of Use:** | | On Demand | | |
| **Assumptions:** | |  | | |
| **Notes and Issues:** | |  | | |

# Stock details

## Feature Process Flow / Use Case Model

## Use Case

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use Case ID:** | INV.UC.5.0.0 | | | |
| **Use Case Name:** | Stock Details page | | | |
| **Created By:** | Mahesh | | **Last Updated By:** |  |
| **Date Created:** | 01/07/2014 | | **Last Revision Date:** |  |
| **Actors:** | | Inventory users, Admin. | | |
| **Description:** | | Screen to update the opening balance Stock and view details like the transactions, serial numbers assigned to the item. | | |
| **Trigger:** | | This screen can be reached by clicking on the stock details menu. | | |
| **Preconditions:** | | User should be authenticated user. | | |
| **Post conditions:**  . | | **Fail Condition:** Data should be consistent, so everything should be under one transaction so everything passes or fails together.  **Pass Conditions:** Create or edit the stock details of an item for various warehouses. | | |
| **Normal Flow:** | | 1. User clicks on the Stock details page 2. User should be taken to a landing page with details like Item code, description, warehouse, closing balance stock shown in a tabular format. – Option to filter the item by item code, description, warehouse should be available. 3. If user want to view the details of an item 4. The user selects an item row; the details of the items like the stock in various warehouses are displayed in the first tab. 5. The second tab displays the stock split by location. Details like location and stock will be displayed. 6. The third tab displays the details of all the transactions like transaction type (Issue, Receipt, Transfer etc), Date of transaction, Reference number, Issue Quantity, Receipt Quantity – option to filter the transaction by reference number, date, type and quantity should be available. 7. The fourth tab contains the entire serial and batch number details of the item – option to filter by serial and batch number should be available. 8. If the user wants to enter an opening balance stock of an item, click on “add new” at the top of the item page which should take the user to the stock details page. 9. User enters the item code and description, help provided based on item code and description. Details of the item if already in stock should be displayed. 10. User selects the warehouse code, help provided based on warehouse code and description. 11. User enters the location, opening balance quantity and opening balance date. Validation to check if the opening balance date is not in future and location is in the pre-configured format. 12. If the item stock is stored by batch number (not serial number), then details of the batch number along with the quantity for each batch will be entered. 13. If the item stock is stored by batch & serial number then details of the batch number and the individual serial number should be entered. 14. Click save, the details will be inserted or updated into the stock master, stock batch and stock serial details table. | | |
| **Alternative Flows:** | |  | | |
| **Exceptions:** | | **1.** Check if the user has authorization to edit or add new items, if not then the user should be taken back to the page where they came from or to the home page with the configurable error message “You do not have access to view the page”.  **4.** If code already exist then when clicking save, a configurable error message should be displayed.  **General:**   1. Every field validation should happen immediately after they leave the control. | | |
| **Includes:** | | Authentication and Authorization use case should be catered for. | | |
| **Frequency of Use:** | | On Demand | | |
| **Assumptions:** | |  | | |
| **Notes and Issues:** | |  | | |

# Miscellaneous Receipts

## Feature Process Flow / Use Case Model

## Use Case

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use Case ID:** | INV.UC.6.0.0 | | | |
| **Use Case Name:** | Miscellaneous Receipts page | | | |
| **Created By:** | Mahesh | | **Last Updated By:** |  |
| **Date Created:** | 01/07/2014 | | **Last Revision Date:** |  |
| **Actors:** | | Inventory users, Admin. | | |
| **Description:** | | Miscellaneous receipts of items without any purchase order. | | |
| **Trigger:** | | This page can be reached by clicking on the transaction menu “Miscellaneous receipts” or from the Item landing page. | | |
| **Preconditions:** | | User should be authenticated user to edit or add new items. | | |
| **Post conditions:**  . | | **Fail Condition:** Data should be consistent, everything should be under one transaction so everything passes or fails together.  **Pass Conditions:** Stock will be received on the chosen warehouse. | | |
| **Normal Flow:** | | 1. User selects the document type. Based on the document type selected the document number should show up the next available number. 2. Field to enter the transaction date. Validation to check that the transaction date is not in future. 3. The details of the user logged in are pre-populated in the user name. Option to change the user, help will be provided based on the user table. 4. Reference number, date and notes (optional field) can be entered. This would form the header of the transaction. 5. Item code, description, reference number, warehouse code, location, batch number and received quantity, should be entered. Everything apart from the reference number would be mandatory. If the stock for the item is not stored in batches then a default batch number say “DB1” is pre-populated on the field and is made non editable. If stock is not maintained by location then a default value “Default Location” is pre-populated and field made read-only. 6. If the stock for the item is handled by serial number then receipt quantity number of boxes should be popped up **(Not sure if it should be a popup or a separate tab)** to enter the individual serial numbers. 7. User clicks on the ok button and the details are populated to the grid below. The details will not saved to the database until the save button is clicked. 8. User can enter more than one item. 9. User will be able to delete or modify the records in the grid. 10. Click save, the details will be inserted into the stock transaction & detail table. The stock is updated or inserted into the stock, stock batch and stock serial tables. | | |
| **Alternative Flows:** | | If the user arrives from the Item landing page, the item code and description should automatically be filled up. | | |
| **Exceptions:** | | 1. If no document type is configured for this transaction, then the user should be redirected to the home page or item landing page with a configurable error message displayed. | | |
| **Includes:** | | Authentication and Authorization use case should be catered for. | | |
| **Notes and Issues:** | |  | | |

# Miscellaneous Issues

## Feature Process Flow / Use Case Model

## Use Case

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use Case ID:** | INV.UC.7.0.0 | | | |
| **Use Case Name:** | Miscellaneous Issues page | | | |
| **Created By:** | Mahesh | | **Last Updated By:** |  |
| **Date Created:** | 01/07/2014 | | **Last Revision Date:** |  |
| **Actors:** | | Inventory users, Admin. | | |
| **Description:** | | Miscellaneous issues of items without any sales order or invoice | | |
| **Trigger:** | | This page can be reached by clicking on the transaction menu “Miscellaneous Issues” or from the Item landing page. | | |
| **Preconditions:** | | User should be authenticated user to edit or add new items. | | |
| **Post conditions:**  . | | **Fail Condition:** Data should be consistent; everything should be under one transaction so everything passes or fails together.  **Pass Conditions:** Stock will be issues from the chosen warehouse. The stock, stock batch and stock serial tables should be updated. | | |
| **Normal Flow:** | | 1. User selects the document type. Based on the document type selected the document number should show up the next available number. 2. Field to enter the transaction date. Validation to check that the transaction date is not in future. 3. The details of the user logged in are pre-populated in the user name. Option to change the user, help will be provided based on the user table. 4. Reference number, date and notes (optional field) can be entered. This would form the header of the transaction. 5. Item code, description, reference number, warehouse code, batch number, location and issue quantity, should be entered. Everything apart from the reference number would be mandatory. If the stock for the item is not stored in batches then a default batch number say “DB1” is pre-populated on the field and is made non editable. If stock is not maintained by location then a default value “Default Location” is pre-populated and field made read-only. 6. If the stock for the item is handled by serial number then issue quantity number of boxes should be popped up **(Not sure if it should be a popup or a separate tab)** to enter the individual serial numbers. 7. User clicks on the ok button and the details are populated to the grid below. The details will not saved to the database until the save button is clicked. 8. User can enter more than one item. 9. User will be able to delete or modify the records in the grid. 10. Click save, the details will be inserted into the stock transaction & detail table. The stock is updated into the stock, stock batch and stock serial tables. | | |
| **Alternative Flows:** | | If the user arrives from the Item landing page, the item code and description should automatically be filled up. | | |
| **Exceptions:** | | 1. If no document type is configured for this transaction, then the user should be redirected to the home page or item landing page with a configurable error message displayed. | | |
| **Includes:** | | Authentication and Authorization use case should be catered for. | | |
| **Frequency of Use:** | | On Demand | | |
| **Assumptions:** | |  | | |
| **Notes and Issues:** | |  | | |

# Stock Transfer

## Feature Process Flow / Use Case Model

## Use Case

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use Case ID:** | INV.UC.8.0.0 | | | |
| **Use Case Name:** | Stock transfer | | | |
| **Created By:** | Mahesh | | **Last Updated By:** |  |
| **Date Created:** | 01/07/2014 | | **Last Revision Date:** |  |
| **Actors:** | | Inventory users, Admin. | | |
| **Description:** | | Transfer of stock from one warehouse to another. | | |
| **Trigger:** | | This page can be reached by clicking on the transaction menu “Stock Transfer” or from the Item landing page. | | |
| **Preconditions:** | | User should be authenticated user to edit or add new items. | | |
| **Post conditions:**  . | | **Fail Condition:** Data should be consistent; everything should be under one transaction so everything passes or fails together.  **Pass Conditions:** Stock will be issued from the “From warehouse” and received onto “To warehouse”. The stock, stock batch and stock serial tables should be updated. | | |
| **Normal Flow:** | | 1. User selects the document type. Based on the document type selected the document number should show up the next available number. 2. Field to enter the transaction date. Validation to check that the transaction date is not in future. 3. The details of the user logged in are pre-populated in the user name. Option to change the user, help will be provided based on the user table. 4. Reference number, date and notes (optional field) can be entered. This would form the header of the transaction. 5. Item code, description, reference number, from warehouse code, batch number, from location, to warehouse, to batch number, to location and quantity to transfer, should be entered. Everything apart from the reference number would be mandatory. If the stock for the item is not stored in batches then a default batch number say “DB1” is pre-populated in from batch and to batch number fields and is made non editable. If stock is not maintained by location then a default value “Default Location” is pre-populated and field made read-only. 6. If the stock for the item is handled by serial number then issue quantity number of boxes should be popped up **(Not sure if it should be a popup or a separate tab)** to enter the individual serial numbers. Option to view the list of serial numbers available for the batch number and select the serial number should be available. 7. User clicks on the ok button and the details are populated to the grid below. The details will not saved to the database until the save button is clicked. 8. User can enter more than one item. 9. User will be able to delete or modify the records in the grid. 10. Click save, the details will be inserted into the stock transaction & detail table. The stock is updated or inserted into the stock, stock batch and stock serial tables. | | |
| **Alternative Flows:** | | If the user arrives from the Item landing page, the item code and description should automatically be filled up. | | |
| **Exceptions:** | | 1. If no document type is configured for this transaction, then the user should be redirected to the home page or item landing page with a configurable error message displayed. | | |
| **Includes:** | | Authentication and Authorization use case should be catered for. | | |
| **Frequency of Use:** | | On Demand | | |
| **Assumptions:** | |  | | |
| **Notes and Issues:** | |  | | |

# Stock Verification

## Feature Process Flow / Use Case Model

## Use Case

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use Case ID:** | INV.UC.9.0.0 | | | |
| **Use Case Name:** | Stock verification | | | |
| **Created By:** | Mahesh | | **Last Updated By:** |  |
| **Date Created:** | 01/07/2014 | | **Last Revision Date:** |  |
| **Actors:** | | Inventory users, Admin. | | |
| **Description:** | | Update the actual physical stock for each location. | | |
| **Trigger:** | | This is one of the first steps in creating the items. This screen can be reached by clicking on the item details from the menu or edit/add item from the Item landing page. | | |
| **Preconditions:** | | User should be authenticated user to edit or add new items. | | |
| **Post conditions:**  . | | 1. **Fail Condition:** Data should be consistent, so everything should be under one transaction so everything passes or fails together. 2. **Pass Conditions:** Stock updated for the particular warehouse. | | |
| **Normal Flow:** | | 1. User selects the document type. Based on the document type selected the document number should show up the next available number. 2. Field to enter the transaction date. Validation to check that the transaction date is not in future. 3. The details of the user logged in are pre-populated in the user name. Option to change the user, help will be provided based on the user table. 4. Reference number, date and notes (optional field) can be entered. This would form the header of the transaction. 5. Item code, description, warehouse code, batch number, location are selected, the quantity available in stock for the particular batch number, location should be populated, the verified quantity should be entered. Everything apart from the reference number would be mandatory. If the stock for the item is not stored in batches then a default batch number say “DB1” is pre-populated in batch number fields and is made non editable. If stock is not maintained by location then a default value “Default Location” is pre-populated and field made read-only. 6. User clicks on the ok button and the details are populated to the grid below. The details will not saved to the database until the save button is clicked. 7. User can enter more than one item. 8. User will be able to delete or modify the records in the grid. 9. Click save, the details will be inserted into the stock transaction & detail table, if the verified quantity is greater than the current stock then a receipt entry transaction and vice versa. The stock is updated in the stock, stock batch and stock serial tables. | | |
|  | | 1. A system id is generated for each row and that id is used everywhere in the database to link it to the category. | | |
| **Exceptions:** | |  | | |
| **Includes:** | | Authentication and Authorization use case should be catered for. | | |
| **Frequency of Use:** | | On Demand | | |
| **Assumptions:** | |  | | |
| **Notes and Issues:** | |  | | |

# Bulk Import of Temporary Items

## Feature Process Flow / Use Case Model

## Use Case

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use Case ID:** | INV.UC.10.0.0 | | | |
| **Use Case Name:** | Bulk import of supplier items | | | |
| **Created By:** | Mahesh | | **Last Updated By:** |  |
| **Date Created:** | 01/07/2014 | | **Last Revision Date:** |  |
| **Actors:** | | Inventory users, Admin. | | |
| **Description:** | | Bulk import temporary items from different suppliers. | | |
| **Trigger:** | | This screen can be reached by clicking on the Bulk import supplier items from the menu. | | |
| **Preconditions:** | | User should be authenticated user to edit or add new items. | | |
| **Post conditions:**  . | | **Fail Condition :** Data should be consistent, so everything should be under one transaction so everything passes or fails together.  **Pass Conditions:** Inserts or updates the items into the temporary material master table. | | |
| **Normal Flow:** | |  | | |
| **Alternative Flows:** | |  | | |
| **Exceptions:** | |  | | |
| **Includes:** | | Authentication and Authorization use case should be catered for. | | |
| **Frequency of Use:** | | On Demand | | |
| **Assumptions:** | |  | | |
| **Notes and Issues:** | |  | | |