The Max Inventory System



**Team Awesome**

|  |  |
| --- | --- |
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Table of Contents

Client Documents …………………………………………………………………………………………………………………………………3

Opening Statement ………………………………………………………………………………………………………………….4

Executive Summary ………………………………………………………………………………………………………………….5

Implications for Client ………………………………………………………………………………………………………………6

Items for Approval…………………………………………………………………………………………………………………….7

Project Documents …………………………………………………………………………………………………………………………………8

System Service Request ……………………………………………………………………………………………………………..9

Project Charter………………………………………………………………………………………………………………………….10

Control Documents …………………………………………………………………………………….………………………………………11

Roles and Responsibilities………………………………………………………………………………………………………...12

Change Log……………………………………………………………………………………………………………………………….13

Communication Management Plan……………………………………………………………………………………………………….15

Meeting Communications……………………………………………………………………………………………………………………..16

Team Member Status Report………………………………………………………………………………………………………………...20

CLIENT DOCUMENTS

Client Documents

**Opening Statement**

Milestone 1 of The Max Inventory System has been completed. The development of this system continues to remain on schedule and on budget.

Client Documents

**Executive Summary**

With technology today bars can make a more efficient use of time and energy by using a system to track inventory. Using an inventory system, a bar can track which items they need to reorder, which items are most popular and which items should be discontinued from their purchases. Many other features can also be available to a bar.

Our plan is to design a system around the liquor usage at The Max. This application will allow them to make orders easier, as well as track where potential theft or breakage may exist. As inventory increases we feel that this system will be a good complement to the already successful bar.

This milestone contains documents to describe The Max Inventory project. The documents include:

* Opening Statement: Details that Milestone 1 has been completed and that the project is on schedule and on budget.
* Executive Summary: Provides a high level overview of the system being developed.
* Implications for Client: Details implications that the client currently has for development of this system.
* Items for Approval: Details items that need to be approved to advance further in the development of this system.
* System Service Request: Details the request for the system.
* Project Charter: Details the intention of this system as well as expected start and completion date.
* Roles and Responsibilities: Outlines the duties of each team member.
* Change Log: Details the changes that have been made during milestone 1.
* Communication Management Plan: Details how the group intends to communicate and how often.
* Meeting Communications: Outlines the communication that we have during meetings and in the day to day development of the system.
* Team Member Status Report: Gives the status of each team member and their duties in the development of milestone 1.

Client Documents

Implications for Client

Currently the only implication for the client is communication about the design of the system.

Client Documents

**Items for Approval**

There are currently no items necessary for approval in The Max Inventory System project

**Project Documents**



**Project Documents**

**System Service Request**

**Requested by:** Derek

**Company:** The Max

**Location:** 1417 Jackson Street Omaha NE 68102

**Contact:** 402-346-4110

**Type of Request:** New system

**Problem Statement:** There is no inventory system in place as on 9/1/2017. The owner is in charge of keeping track of inventory and would like to be able to give the task to another employee. The inventory system is currently pen and paper, which allows for more errors to happen in the liquor ordering process.

**Service Request:** The customer would like a liquor inventory system to help make liquor orders easier. This system should tell the customer the quantity of each individual liquor to be ordered and should give an order list organized by liquor distributors. For example, if the required amount of Jack Daniels on hand was ten bottles and there was only eight bottles. When the report for ordering was run, the report would tell the customer that at least two bottles of Jack Daniels was needed. It would also say which warehouse would need to be contacted to order the bottles of Jack Daniels.

**IS Liaison:** Justin Hendricks jhendricks01@unomaha.edu

**Sponsor:** The Max

**Project Documents**

**Project Charter**

**Project Charter**

**Project Name:** Liquor Inventory System

**Project Manager:**

**Customer:** The Max

**Project Start/End (projected): 9/1/17- 5/5/18**

**Project Overview:** This project will implement an inventory system to keep track of which liquors need to be ordered and compile a list by distributor to make liquor orders easier.

**Objectives:**

* Track liquor inventory and be able to let the customer know which liquors to order and the quantity of each liquor to order.
* Track potential theft by enabling the customer to track which liquors need to be ordered more often than regular.
* **Key Assumptions:**
  + System will use open source software
  + System will be built in house
  + System will use a database maintained by customer
* Stakeholders and Responsibilities:

|  |  |  |
| --- | --- | --- |
| Stakeholders | Role | Responsibility |
| Paul Naumann | Document Manager II | Assist in managing documents |
| Collyn Sansoni | Document Manager I | Manage documents |
| Justin Hendricks | IS Liaison | Communicate between team and customer |
| Tom Jorgenson | Milestone manager | Manage Milestone 1 |
| Derek | The MAX owner | Communicate system needs |

**Control Documents**

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**Control Documents**

**Roles and Responsibilities**

|  |  |  |
| --- | --- | --- |
| Name | Role | Responsibility |
| Justin | Client Liaison | Communicating with Customer/Customer Needs |
| Paul | Document Manager II | Backup Collyn managing documents |
| Collyn | Document Manager I | Managing Documents for group |
| Tom | Milestone Manager | Collecting documents for turning in. |

Control Documents

**Change Log**

|  |  |  |
| --- | --- | --- |
| Date | Name | Description |
| 8/30/17 | Creation of Change Log | Creation of Change Log and Roles and Responsibilities Documents |
| 8/30/17 | Creation of GitHub Repository | Created the GitHub Repository and added members of group |
| 9/5/17 | Creation of Communication Management Plan | Created the Communication Management Plan Document |
| 9/5/17 | Creation of Executive Summary | Created the Executive Summary document |
| 9/5/17 | Creation of Implications for Client | Created Implications for Client document |
| 9/6/17 | Creation of Items for Approval | Created Items for Approval document |
| 9/6/17 | Creation of Meeting Communications | Created Meeting Communications document |
| 9/6/17 | Creation of Opening Statement | Created Opening Statement document |
| 9/6/17 | Creation of Project Charter | Created Project Charter document |
| 9/6/17 | Creation of System Service Request | Created System Service Request document |
| 9/6/17 | Creation of Title Page | Created Title Page document |
| 9/8/17 | Revised Executive Summary | Revised Executive Summary |
| 9/10/17 | Revised Title Page | Added logo to Title Page |
| 9/11/17 | Updated Communication Management Plan | Included the use of slack website for communication within the group |
| 9/11/17 | Revised Project Charter | Added Stakeholders and Responsibilities |
| 9/11/17 | Revised Milestone 1 document | Addressed changes suggested by Professor Germonprez |

**Communication Management Plan**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| What | Who | Purpose | When/Frequency | Type of Meeting |
| Bi-Weekly Meeting | The Max Inventory Development team | To discuss status of current milestone and possible revisions needed | Every other week occurring  Thursday at 7:00 PM, unless otherwise noted | In person meeting |
| Ongoing Max Inventory Updates | The Max Inventory Development team | Inform Max Inventory Development team of necessary updates | Open | Group text or slack.com group chat |
| Presentations | The Max Inventory Development team | Present necessary information for project | As necessary | In person presentations |

**Meeting Communications**

**Date:** 8/30/17

**Time:** 1 PM US Central Time

**Location:** Scheduled Classroom (Rm 155)

**Present:**

Paul Naumann, Tom Jorgenson, Collyn Sansoni, Justin Hendricks

**Absent:**

Not Applicable

**Subject:**

|  |  |  |
| --- | --- | --- |
| **Item** | **Responsible Party** | **Comments** |
| Initial Group Meeting | Team Awesome | * Met and created Change Log and Roles and Responsibility Document. * Also set up meeting with client for 8/31/17 at 8 PM, to discuss system. |

**Handouts:** None

**Discussion:** See Comments

**Date:** 8/31/17

**Time:** 7 PM US Central Time

**Location:** The Max

**Present:**

Paul Naumann, Tom Jorgenson, Collyn Sansoni, Justin Hendricks, Derek

|  |  |  |
| --- | --- | --- |
| **Item** | **Responsible Party** | **Comments** |
| Initial Meeting with client | Team Awesome | * Met with Derek to discuss desired features for the inventory system |

**Handouts:** None

**Discussion:** See Comments

**Date:**  Week beginning 9/04/17

**Time:** All week

**Location:** Group text/ slack.com chat

**Present:**

Paul Naumann, Tom Jorgenson, Collyn Sansoni, Justin Hendricks, Derek

|  |  |  |
| --- | --- | --- |
| **Item** | **Responsible Party** | **Comments** |
| Summary of group text/ slack.com chat | Team Awesome | * Discussed current status of Milestone 1 documents * Divided remaining tasks amongst team members |

**Handouts:** None

**Discussion:** See Comments

**Date:**9/11/17

**Time:** 1:30pm US Central Time

**Location:** Scheduled Classroom (PKI Rm 155)

**Present:** Thomas Jorgensen, Paul Naumann, Justin Hendricks, Collyn Sansoni

**Absent:** Not Applicable

**Subject:**

|  |  |  |
| --- | --- | --- |
| **Item** | **Responsible Party** | **Comments** |
| Milestone 1 | Team Awesome | Wrapped up tasks for Milestone 1. This included the Team Member Status Report.  2. Discussed Header Content and set Headers up.  3. Will e-mail Professor Germonprez for feedback |
| Other | Team Awesome | Watched video that Professor Germonprez posted on Canvas |

**Handouts:** None

**Discussion:** See Comments

**Date:**  Week beginning 9/11/17

**Time:** All week

**Location:** Group text/ slack.com chat

**Present:**

Paul Naumann, Tom Jorgenson, Collyn Sansoni, Justin Hendricks, Derek

|  |  |  |
| --- | --- | --- |
| **Item** | **Responsible Party** | **Comments** |
| Summary of group text/ slack.com chat | Team Awesome | * Discussed current status of Milestone 1 documents * Discussed necessary revisions to documents * Divided necessary revisions amongst the team |

**Handouts:** None

**Discussion:** See Comments

**Team Member Status Report**

**Current Milestone Activities**

Name: Thomas Jorgensen

Completed

1) Created GitHub repository

2) Met with client and determined needs for product

3) Created and revised documents for Milestone 1

* Opening Statement
* Executive Summary
* Implications for Client

In-Progress (estimated date of completion)

1. Milestone 2 activities (10/11/17)

Other/Issues

1. Not Applicable

**Current Milestone Activities**

**Name:** Collyn Sansoni

**Completed**

1) Completed Milestone 1 documents

* Meeting Communications
* Team Member Status Report

2) Met with client and determined needs for product

3) Created slack.com chat group

4) Created group text

**In-Progress (estimated date of completion)**

1) Milestone 2 activities (10/11/17)

**Other/Issues**

1) Not Applicable

**Current Milestone Activities**

**Name:** Justin Hendricks

**Completed**

1) Completed Milestone 1 documents

* Roles and Responsibilities
* Change Log
* Communication Management Plan

2) Met with client and determined needs for product

* Organized meeting between Derek and Team Awesome

**In-Progress (estimated date of completion)**

1) Milestone 2 activities (10/11/17)

**Other/Issues**

1) Not Applicable

**Current Milestone Activities**

**Name:** Paul Naumann

**Completed**

1) Met with client and determined needs for product

2) Created and revised documents for Milestone 1

* Implications for Client
* Items for Approval
* System Service Request
* Project Charter

**In-Progress (estimated date of completion)**

1) Milestone 2 activities (10/11/17)

**Other/Issues**

1) Not Applicable