Project Status Report

Project Name:	IPOS – Inventory and Point of Sale system
Department:	SoCIT
Focus Area:	Inventory Management systems and Point of Sale
Product/Process:	The project is intended to provide an inventory system and will also produce a forecasting

Prepared By:

Document Owner(s)	Project/Organization Role
Marco Joaquin B. Po	Project Manager & Developer
Joseph Alovera	System Analyst

Project Status Report Version Control

Version	Date	Author	Change Description
1.0	2/19/19	• Marco Joaquin B. Po • Joseph Alovera	Document created

TABLE OF CONTENTS

Contents

1 PROJECT STATUS REPORT PURPOSE

This document is intended to address different factors that are crucial to the project's completion. It is the role of the Project Manager to communicate with its clients and advisors to be able to provide its members a clear picture of what the outcome of the project should be. The deliverables will provide:

- Context of significant progresses that are contributory to the project's completion and its impact on the overall completion of the project
- Costing of the required materials to accomplish the project and different miscellaneous expenses contributing to the project
- Challenges faced by the members in completing the project and recommendations to such

2 PROJECT STATUS REPORT TEMPLATE

2.1 Project Status Report Details

IPOS – Inventory and Point of Sale system		
Prepared By: Marco Joaquin Po Joseph Alovera	Date: 2/19/2019	Reporting Period: **9/20/2018** to **2/19/2019**
Project Overall Status: Project Overall Status: With the aim of helping the business, 7th of May trading, keep track of their transactions and reports; the group will create a web application of an inventory system and point of sales. Since staffs have difficulty in managing the business's transactions, the inventory system may lessen their troubles. • To lessen the inaccuracies that may occur while manually managing the transactions by implementing an inventory system that will keep track of all transactions. • To have an accurate results and records through creating a web application that will manage transactions and send periodical reports.		
Project Summary: inventory system and point of sale for the 7th of May trading that can keep track of the items. In addition, the inventory system can easily be updated to show the current availability status of all the items, thus demanding less time and effort from the staffs.		

Project impact of milestone success or failure for project remainder

[Replace this text with a description of milestone and potential scope changes.]	[Replace this text with a brief description of any changes to the project schedule required as a result of the amended milestone(s).]

Project Budget/Financial Status

Budget Item	Planned Budget	Actual Cost	Variance/Explanation

Project Risk Management Status

Risk and Description	Risk Chance	Risk Impact	Risk Priority	Change from Last Review
[Description of Risk] • [**Item**] • [**Item**]	[High/Medium/Low]	[High/Medium/Low]	[High/Medium/Low]	[Description]
[Description of Risk] • [**Item**] • [**Item**]	[High/Medium/Low]	[High/Medium/Low]	[High/Medium/Low]	[Description]

Project Issue Management Status

Issue and Description	Project Impact	Target Due Date	Issue Status	Issue Resolution
[Description of Risk] • [**Item**] • [**Item**]	[High/Medium/Low]	[**mm/dd/yy**]	[Open/Closed]	[Description]
[Description of Risk] • [**Item**] • [**Item**]	[High/Medium/Low]	[**mm/dd/yy**]	[Open/Closed]	[Description]

Project Recommendations

[Replace this text with a brief statement for the Steering Committee, Project Sponsor, or Senior Manager to consider or endorse. Other questions to consider for review with key project stakeholders are:

• Will the project be completed on time and on budget?

- Will the project deliverables be completed within acceptable quality levels?
- Are scope change requests being managed successfully?
- Are project issues and risks being addressed successfully and mitigated?
- Are all customer concerns being addressed successfully?]

Objectives for Next Project Status Review

[Replace this text with a brief outline of project expectations for key project stakeholders to consider for the next review.]

Related Project Information

[Replace this text with an attachment or link to other relevant information that can be included with this project status report. Examples include:

- Budget Report Summary
- Issue Record Report
- Scope Change Report
- Project Work Plan
- Project Metrics/Statistics
- Quality Management Review.]

3 PROJECT STATUS REPORT APPROVALS

Prepared by _____
Project Manager

Approved by _____
Project Advisor

_____
Client Sponsor

1. Business Requirements

<The business requirements provide the foundation and reference for all detailed requirements development. You may gather business requirements from the customer or development organization's senior management, an executive sponsor, a project visionary, product management, the marketing department, or other individuals who have a clear sense of why the project is being undertaken and the ultimate value it will provide, both to the business and to customers.>

1.1. Background

Inventory is important in business it plays a major part in business operations. Having a good inventory system will be a great asset for a business. It improves the accuracy, efficiency and help plan a strategy for the business. Due to this reason we propose IPOS a Inventory and pos that will help the entrepreneurs in having a strategy with the use of forecasting reports from the system. Also, it will be a easy to use for both the business and its customers, because due to rise of technology and the IPOS will have a online transaction to have more convenience.

1.2. Business Opportunity

In today's fast paced world, many businesses are competing globally to make their business grow. Having a inventory manage software that can help you lower your expenses and minimize the errors will be a great asset to the company. IPOS can help the business to compete globally. Having IPOS will automate the process of inventory that will make the staff focus on the other things. Tracking the inventory and having a good report will help you to plan and control your products, that can give you more profits.

1.3. Business Objectives and Success Criteria

1.4. Customer or Market Needs

<Describe the needs of typical customers or market segments, including needs that are not yet met by the marketplace or by existing systems. You may wish to describe problems customers currently encounter that the new product will (or will not) address and how the product would be used by customers. Identify the customer hardware and software environment in which the product must operate. Define at a high level any known critical interface or performance requirements. Avoid including any design or implementation details. Present the requirements in a numbered list so that more detailed user or functional requirements can be traced to them.>

Businesses needs an inventory, it provides the things they needed to gain a profit.

1.5. Business Risks

The major business risk for developing this product is that we have so many competitions in developing this product and it's hard to find an edge for the product. When It comes to implementing the product the problem that we will encounter is the owners of the hardware store if they want to have an automated system for their stores. In order to manage the store with our product they only need to control everything using the product.

2. Vision of the Solution

The proposed system will provide an aid on inventory and point of sale processing by using the proposed system It will be more efficient and effective once the automation is used it will help the whole process of the hardware store's.

2.1. Vision Statement

Inventory and point of sale system is a must for a business to succeed. To control every growth of the business.

2.2. Major Features

The Inventory and Point of sale system will have the Following major features:

-There will be different accounts for Admin and staff

-A forecasting reports in daily, monthly and yearly.

-QR code scanner for the items to be easily identify.

2.3. Assumptions and Dependencies

<Record any assumptions that were made when conceiving the project and writing this vision and scope document. Note any major dependencies the project must rely upon for success, such as specific technologies, third-party vendors, development partners, or other business relationships.>

3. Scope and Limitations

This project aims to provide an automated inventory system and point of sale where the system can inventory all products in the storage room of the store. It should have the capabilities in generating a report like daily monthly and yearly sale. Top and least selling products. t should also add, delete, save, update and to know when the product should be replenishing and show the remaining products in the store and should show the transaction and order status.

inventory and point of sale system will only limit to the following:

- The proposed system is intended to 7th of May Trading's hardware store.

- Admin staff can add, edit, delete, update the inventory and generate the reports.

- Staff can only view the product and process the order.

- Two separate account for the staff and the admin staff.

- No online transactions.

3.1. Scope of Initial Release

<Describe the intended major features that will be included in the initial release of the product. Consider the benefits the product is intended to bring to the various customer communities, and generally describe the product features and quality characteristics that will enable it to provide those benefits. Avoid the temptation to include every possible feature that any potential customer category might conceivably want some day. Focus on those features and product characteristics that will provide the most value, at the most acceptable development cost, to the broadest community.>

The Initial release will have the following features:

-There will be different accounts for Admin and staff

-A forecasting reports in daily, monthly and yearly.

-QR code scanner for the items to be easily identify.

3.2. Scope of Subsequent Releases

For the later release of the some features we would focus on the following:

- A online shopping system.
- Using of QR code as an official receipt and to be use as a proof.
- Automatic Email to suppliers for replenishments.

3.1 Project Charter

A. General Information

Provide basic information about the project including: Project Title – The proper name used to identify this project; Project Working Title – The working name or acronym that will be used for the project; Proponent Secretary – The Secretary to whom the proponent agency is assigned or the Secretary that is sponsoring an enterprise project; Proponent Agency – The agency that will be responsible for the management of the project; Prepared by – The person(s) preparing this document.

Project Title:	IPoS -Inventory and Point of Sale system	**Project Working Title:**	
Proponent Secretary:		**Proponent Agency:**	
Prepared by:	Marco Joaquin Po Joseph Alovera		

Points of Contact

List the principal individuals who may be contacted for information regarding the project.

Position	Title/Name/Organization	Phone	E-mail
Project Sponsor			
Program Manager	Marco Joaquin Po	09156262476	mbpo@student.apc.edu.ph
Project Manager	Marco Joaquin Po	09156262476	mbpo@student.apc.edu.ph
Proponent Cabinet Secretary	Joseph Alovera		jbalovera@student.apc.edu.ph
Proponent Agency Head			

Customer (User) Representative(s)			
Other			

B. Executive Summary

An Executive Summary is required when Sections C thru G of the charter are excessively long.
In two or three paragraphs, provide a brief overview of this project and the contents of this document.ugu

The 7th of May Trading is a hardware store that still uses manual inventory and computing of sales. There are numerous hardware store that are growing and there is numerous businesses that also have the same processes. The group aims to create a web application of an inventory system and point of sale in order to lessen. The web application will also make it easier for the personnel to keep track of the business's transactions and reports.

C. Project Purpose

Explain the business reason(s) for doing this project. The Project Purpose (the Business

Problem and Project Business Objectives) is in the Project Proposal, Section B.

1. *Business Problem*

The Business Problem is a question, issue, or situation, pertaining to the business, which needs to be answered or resolved. State in specific terms the problem or issue this project will resolve. Often, the Business Problem is reflected as a critical business issue or initiative in the Agency's Strategic Plan or IT Strategic Plan.

The specific problems of the 7th of May Trading's are:

-Trouble knowing when to replenish the products.

-Problem in producing of reports like daily sale, weekly sale, yearly sale,

top-selling product least selling product.

-Redundancy in computing the sales and recording transactions.

2. *Project Business Objectives*

Define the specific Business Objectives of the project that correlate to the strategic initiatives or issues identified in the Commonwealth or Agency Strategic Plan. Every Business Objective must relate to at least one strategic initiative or issue and every initiative or issue cited must relate to at least one project business objective.

Commonwealth or Agency Strategic Plan – Initiative or Critical Issue	Project Business Objectives

D. Assumptions

Assumptions are statements taken for granted or accepted as true without proof. Assumptions are made in the absence of fact. List and describe the assumptions made in the decision to charter this project.

This will help the small medium hardware stores have a better opportunity to have an automated system to provide faster transaction and process around the hardware stores. This will help them keep track of their sales and help them predict the following items that they should need for the following season.

E. Project Description, Scope and Management Milestones

1. Project Description
Describe the project approach, specific solution, customer(s), and benefits. The Project Description is located in the Project Proposal, Section C.

The main objective of this project is to create an inventory management and point of sale system for 7th of May Trading it also aims to do the following: Improve the inventory and point of sale system, maintain an updated record of inventory and provide an accurate and definitive reports of daily sales, weekly, monthly sales. Top-selling product and least selling product,Revenue. And it will also show the product that would be needing replenishment it will also provide QR Code for the customer via email when they order online, and the admin can scan the QR code to know what the customer ordered through the website application.

2. Scope

The Project Scope defines all of the products and services provided by a project, and identifies the limits of the project. In other words, the Project Scope establishes the boundaries of a project. The Project Scope addresses the who, what, where, when, and why of a project.

This study aims to provide an automated inventory system and point of sale where the system can inventory all the product in the storage room of the hardware store. It should have the capabilities in generating a report like daily sale, monthly sale, top selling product and least selling product. It should also add, delete, update and also to provide QRcode via email for the customer when they order online through the web in addition to that the staff can scan the QRcode to know what the customer ordered and to know when the product should be replenish and show the remaining products in the store and should show the transaction and order status.

The 7th of May Trading's Hardware store inventory and point of sale system will only limit to

the following:

• Two separate account for the staff and the admin staff.

• No credit card transaction.

• Admin can view the product and process the order.

• Staff can add, edit, delete, update the inventory and generate the reports.

3. *Summary of Major Management Milestones and Deliverables*

Provide a list of Project Management Milestones and Deliverables (see Section E of the Project Proposal Document). This list of deliverables is not the same as the products and services provided, but is specific to management of the project. An example of a Project Management Milestone is the Project Plan Completed.

Event	Estimated Date	Estimated Duration
Project Charter Approved		
Project Plan Completed		
Project Plan Approved		
Project Execution – Started		
Project Execution Completed		
Project Closed Out		

F. Project Authority

Describe the authority of the individual or organization initiating the project, any management constraints, management oversight of the project, and the authority granted to the Project Manager.

1. Authorization

Name the project approval authority that is committing organization resources to the project. Identify the source of this authority. The source of the approval authority often resides in code or policy and is related to the authority of the individual's position or title.

The project manager has the authority to manage the objectives of the project.

2. Project Manager

Name the Project Manager and define his or her role and responsibility over the project. Depending on the project's complexities, include how the Project Manager will control matrixed organizations and employees.

Marco Joaquin Po is the project manager and his role is to manage and organize the specific process in the making of the project.

3. Oversight

Describe the Commonwealth or Agency Oversight controls over the project.

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G. Project Organization

1. Project Organization Chart
Provide a graphic depiction of the project team. The graphical representation is a hierarchal diagram of the project organization that begins with the project sponsor and includes the project team and other stakeholders.

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4 2. Organization Description

Describe the type of organization used for the project team, its makeup, and the lines of authority.

3. Roles and Responsibilities

Describe, at a minimum, the Roles and Responsibilities of all stakeholders identified in the organizational diagram above. Some stakeholders may exist whom are not part of the formal project team but have roles and responsibilities related to the project. Include these stakeholders' roles and responsibilities also.
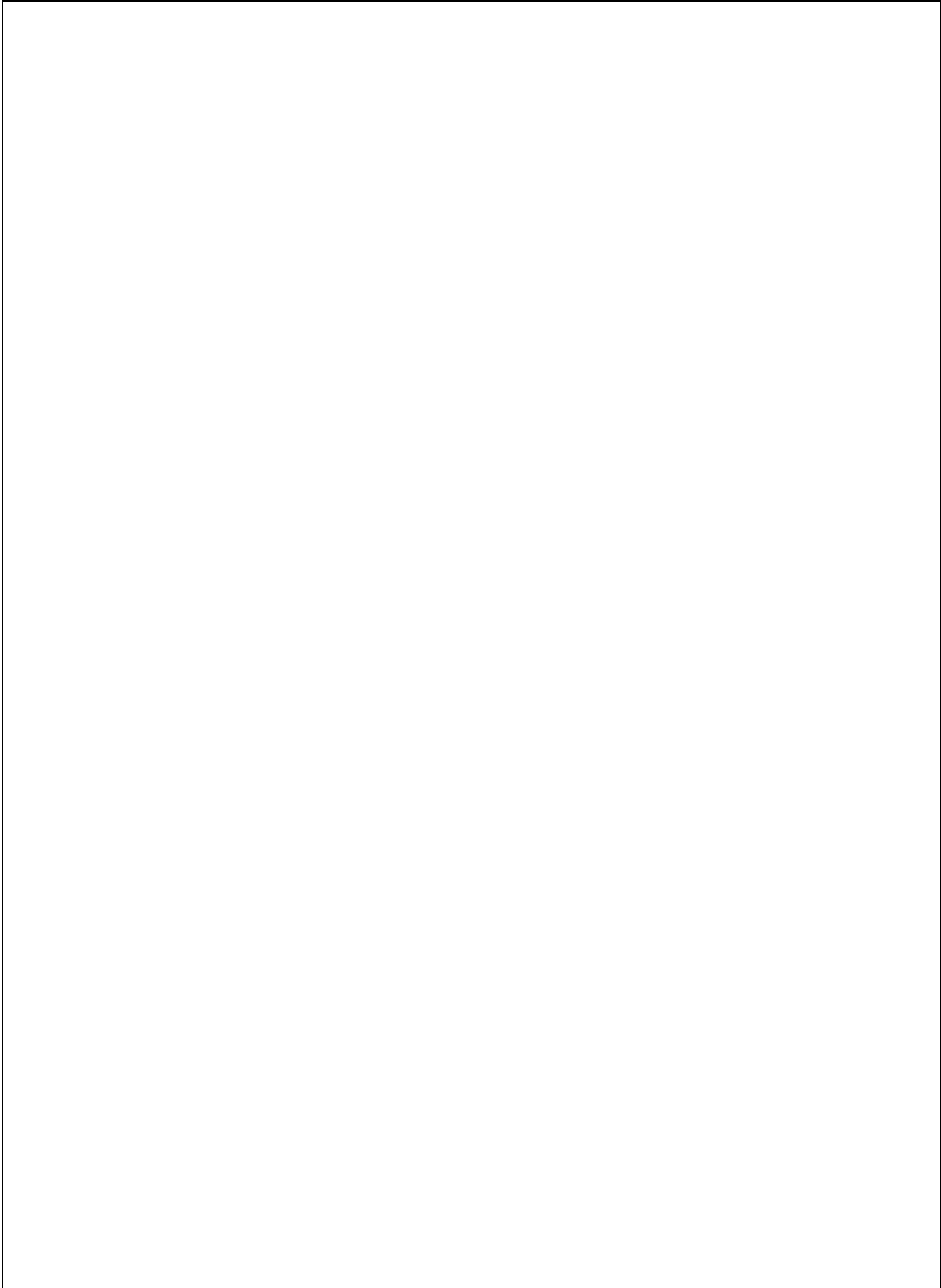
H. Resources

Identify the initial funding, personnel, and other resources, committed to this project by the project sponsor. Additional resources may be committed upon completion of the detailed project plan.

Resources	Allocation and Source
Funding	Free source
Project Team (Full and Part Time Staff)	Marco Joaquin Po – Project Manager & System Developer Joseph Alovera - System Analyst and Project Researcher
Customer Support	
Facilities	
Equipment	Desktop Computer/Laptop
Software Tools	XAMPP,MYSQL
Other	

I. Signatures

The Signatures of the people below document approval of the formal Project Charter. The Project Manager is empowered by this charter to proceed with the project as outlined in the charter.

Position/Title	Signature/Printed Name/Title	Date
Proponent Cabinet Secretary (as required)		
Proponent Agency Head		
Project Sponsor (required)		
Program Manager		
Project Manager (required)		
Other Stakeholders as needed		

Other Stakeholders as needed		

PROJECT MANAGEMENT DOCS
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PROJECT CHANGE MANAGEMENT PLAN TEMPLATE
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CHANGE MANAGEMENT PLAN
IPoS-Inventory and Point of Sale System

7th of May Trading
Rizal Avenue, Taytay, Rizal, Rizal Ave,
Taytay, Lalawigan ng Rizal

DATE
March 26 ,2019

4.1 TABLE OF CONTENTS

5 INTRODUCTION

Change Management is an important part of any project. Changes must be vetted and managed to ensure that they are within the scope of the project and are communicated to all stakeholders if they are approved. The process for submitting, reviewing, and approving changes must also be communicated to all stakeholders in order to properly set expectations. If changes are allowed to be submitted or are implemented in and unorganized way, any project is sure to fail. All projects must include a Change Management Plan as part of the overall Project Plan.

The Change Management Plan was created for the Inventory Services (IS) Project in order to set expectations on how the approach to changes will be managed, what defines a change, the purpose and role of the change control board, and the overall change management process. All stakeholders will be expected to submit or request changes to the IS Project in accordance with this Change Management Plan and all requests and submissions will follow the process detailed herein.

6 CHANGE MANAGEMENT APPROACH

This section describes the approach the organization will use for managing change throughout the project. Throughout a project's lifecycle there may be very few or very many submitted changes. The approach taken to manage these changes must be consistent and repeatable in order to provide a quality change management plan and process.

The Change Management approach for the IS Project will ensure that all proposed changes are defined, reviewed, and agreed upon so they can be properly implemented and communicated to all stakeholders. This approach will also ensure that only changes within the scope of this project are approved and implemented.

The Change Management approach is not to be confused with the Change Management Process which will be detailed later in this plan. The Change Management approach consists of three areas:

- Ensure changes are within scope and beneficial to the project
- Determine how the change will be implemented
- Manage the change as it is implemented

The Change Management process has been designed to make sure this approach is followed for all changes. By using this approach methodology, the IS Project Team will prevent unnecessary change from occurring and focus its resources only on beneficial changes within the project scope.

7 DEFINITIONS OF CHANGE

This section defines the different types of changes that may be requested and considered for the project. These changes may include schedule change, budget change, scope change, or project document changes. Most changes will impact at least one of these areas and it is important to consider these impacts and how they will affect the project.

There are several types of changes which may be requested and considered for the IS Project. Depending on the extent and type of proposed changes, changes project documentation and the

communication of these changes will be required to include any approved changes into the project plan and ensure all stakeholders are notified. Types of changes include:

- Scheduling Changes: changes which will impact the approved project schedule. These changes may require fast tracking, crashing, or re-baselining the schedule depending on the significance of the impact.
- Budget Changes: changes which will impact the approved project budget. These changes may require requesting additional funding, releasing funding which would no longer be required, or adding to project or management reserves. May require changes to the cost baseline.
- Scope Changes: changes which are necessary and impact the project's scope which may be the result of unforeseen requirements which were not initially planned for. These changes may also impact budget and schedule. These changes may require revision to WBS, project scope statement, and other project documentation as necessary.

The project manager must ensure that any approved changes are communicated to the project stakeholders. Additionally, as changes are approved, the project manager must ensure that the changes are captured in the project documentation where necessary. These document updates must then be communicated to the project team and stakeholders as well.

8 CHANGE CONTROL BOARD

This section describes the Change Control Board, the purpose of the board, and the members and their roles on the board. The change control board is the approval authority for all proposed project changes. If a change is not approved by the control board then it will not be implemented with the project. The size and function of change control boards may vary depending on the organization but their purpose and the roles and responsibilities are consistent.

The Change Control Board (CCB) is the approval authority for all proposed change requests pertaining to the IS Project. The purpose of the CCB is to review all change requests, determine their impacts on the project risk, scope, cost, and schedule, and to approve or deny each change request. The following chart provides a list of the CCB members for the IS Project:

Name	Position	CCB Role
A. Smith	IS Project Sponsor	CCB Chair
T. White	IS Project Manager	CCB Member
B. Brown	IS Project Technical Lead	CCB Co-Chair
J. Jones	IS Project Operations Lead	CCB Member

As change requests are submitted to the IS Project Manager by the project team/stakeholders, the
Project Manager will log the requests in the change log and the CCB will convene every other Friday to review all change requests. For a change request to be approved, all CCB members must vote in favor. In the event more information is needed for a particular change request, the request will be deferred and sent back to the requestor for more information or clarification. If a change is deemed critical, an ad hoc CCB meeting can be called in order to review the change prior to the next scheduled bi-weekly CCB meeting.

9 ROLES AND RESPONSIBILITIES

This section describes the roles and responsibilities of project team members in regards to the change management process. It is important that everyone understands these roles and responsibilities as they work through the change management process. These roles and responsibilities must be communicated as part of the change management plan to all project stakeholders.

The following are the roles and responsibilities for all change management efforts related to the IS Project:

Project Sponsor:
- Approve all changes to budget/funding allocations
- Approve all changes to schedule baseline
- Approve any changes in project scope
- Chair the CCB

Project Manager:
- Receive and log all change requests from project stakeholders
- Conduct preliminary risk, cost, schedule, scope analysis of change prior to CCB
- Seek clarification from change requestors on any open issues or concerns
- Make documentation revisions/edits as necessary for all approved changes
- Participate on CCB

Project Team/Stakeholders:
- Submit all change requests on standard organizational change request forms
- Provide all applicable information and detail on change request forms
- Be prepared to address questions regarding any submitted change requests
- Provide feedback as necessary on impact of proposed changes

10 CHANGE CONTROL PROCESS

This section should describe the change control process from beginning to end. Typically, a change control process should be an organizational standard and repeatable. This process is the tool which is used to ensure adherence to the organization's change management approach which was discussed in an earlier section. By following all of the steps, the project team can successfully incorporate approved changes, communicate the changes, and update project documentation.

The Change Control Process for the IS Project will follow the organizational standard change process for all projects. The project manager has overall responsibility for executing the change management process for each change request.

1) Identify the need for a change (Stakeholders) – Change requestor will submit a completed change request form to the project manager.
2) Log change in the change request register (Project Manager) – The project manager will keep a log of all submitted change requests throughout the project's lifecycle.

3) Evaluate the change (Project Manager, Team, Requestor) – The project manager will conduct a preliminary analysis on the impact of the change to risk, cost, schedule, and scope and seek clarification from team members and the change requestor.

4) Submit change request to CCB (Project Manager) – The project manager will submit the change request, as well as the preliminary analysis, to the CCB for review.

5) Obtain Decision on change request (CCB) – The CCB will discuss the proposed change and decide whether or not it will be approved based on all submitted information.

6) Implement change (Project Manager) – If a change is approved by the CCB, the project manager will update and re-baseline project documentation as necessary.

10.1 SPONSOR ACCEPTANCE

Approved by the Project Sponsor:

_____   Date: _____
<Project Sponsor>
<Project Sponsor Title>

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