New work on 11/16/21 – backlog refinement process

* Alan was thinking that we could use different elements of time to capture the different story pieces – maybe a new EOT, use sub comments as acceptance criteria, use the sub flags/tags as the scrum board phases, use sub sign-off’s to record who approves what
* We went in to adilas and looked over some current options of EOT section
* Slice OUR epic Together
	+ Our epic – create a global item catalog – giant master list of items – able to set it up on one enterprise corp and then be able to push and pull to smaller transactional corps
	+ Sample from Alan - “As a manager with multiple corps, I want to manage items from a single corp, so that I don’t have to duplicate work.”
	+ We know that we need global lists of part categories, unit of measure, vendors (already done), parent attributes, photos/images, media/content
	+ What is wanted? Acceptance criteria
	+ Bryan – brought up a past project from invoices to PO’s to cross between corps
		- Has some existing code there and uses similar processes
	+ We need a master list (with an API)
	+ Per server for now – MVP
		- Next step – would be master/master list and then allow for a subscribe level – super high corp has a list, any corp below that could access that, even if not on the same box or server
	+ Wayne – maybe write an API socket that is server independent
	+ Cory – future project or phase – the master image list and product image catalog
	+ Bryan – would like to see (some training) how the vendor catalog works and is there parts and pieces that we could harness from that project?
		- Alan wrote this and may be able to do and give some training on that, to let them see the pieces.
		- We know that eventually we will be parts, items, customers, chart of accounts (expense types and deposit types), etc. – other future global catalogs to transfer info between corps
	+ Push from master to transactional systems
	+ Pull from enterprise to transactional systems
	+ Permissions – who can do this… and locks and un-locks
		- We can create new permissions as needed
		- As a note, the vendor catalog looked at some cross corp settings (enterprise level settings) and then checked permissions after that.
	+ We need new items (every time) vs just a cross corp mapping – database level and really creating new database entries
	+ Which pages will be exposed to these changes?
	+ At the top level, login based, we need to look at is the current corp. Is it part of a bigger enterprise system?
	+ Let’s break these pieces into their own mini user stories – We eventually want a full master item list, these are some smaller pieces of the whole: global lists of part categories, unit of measure, vendors (already done), parent attributes, photos/images, media/content
		- Sample – units of measure
			* There are global units of measure (things tied to corp id 1). There are also custom or corp-specific units of measure. These are tied to a corp id that is not 1.
			* We don’t need to worry about the generic ones… they are already global. We only need to worry about the corp specific ones.
			* On permissions – do we want to lock it down and only allow the push or pull options?
			* User story – As a manager, I want to be able to add a new custom unit of measure to the enterprise corp.
			* By default, we are going to lock things down… no extra settings at this time. If you are part of an enterprise corp, it is just locked. Period.
			* As a note, we may be able to skip the UOM’s due to the fact that we have a ton of global values already. We could just error out if a custom UOM is requested.
		- Sample – part categories
			* There is one global part category (id=2) for internal items or parts.
			* Requirements – add new, update, push, pull, map them (view/check), set as inactive, lock down on transactional side
			* Images – duplicate and copy to new corp folders or do we play a different game and setup good references – we save resources on references
				+ There is a small risk – can of worms – if we go to reference, we have a few other pages to tweak. Known in ecomm and on the add/edit part categories page
				+ We had a discussion, we feel like we would like to add a new db column and do some real references to other files and photo assets
				+ We talked about making sure that this new db column could handle the full path to the resource. Thinking of a varchar 150 or varchar 255 size/length.
			* User story – As a manager, I want to add a new part category and have the ability to push that new category to any of my transactional systems.
				+ Acceptance criteria – Normal add and then show which corps I can push it to… present a small list. Almost a second step or added into the bottom of the main add form.
				+ Acceptance criteria – show a list of corps that got the new add.
			* User story – As a manager, I want to update or edit a part category and make sure that the transactional corps get the same update.
				+ If a mapping exists (conditional), they would all be updated. Automatic.
				+ Do we need a selection for strategic updates? Unknown – maybe skip for now. We are assuming that they want everything to fully follow suite.
				+ Acceptance criteria – show a list of corps that got the update.
				+ Acceptance criteria – if they disable or set to inactive, does that cascade to all transactions. This is making some hidden or inactive.

This may require some validation to allow for things to be set to inactive – check the other corps first

* + - * User story – As a manager, I want to make sure that one of my transactional corps has a specific part category. I want to click a push button that will allow me to be specific on where that data goes.
				+ Acceptance criteria – The system will show any current mappings and allow for select of one or more corps to push the data to.
				+ Acceptance criteria – Show corps that don’t have any mappings for that specific part category.
			* User story – As a manager, I want to control and view my mappings between part categories between corporations. This allows me to maintain, update, or delete a mapping.
				+ This one may need a little bit more details and explanation. It gets kind of deep.
				+ We would love to see a list of what corps have which categories – kind of an overview of enterprise and transactional corps.
			* User story – As a general user, I want to be able to pull down a part category from the master list.
			* User story – As a general user, If I need a change made, how do I request that, if I’m blocked.
			* User story – As any user, on a transaction corp, I’m expecting to not be able to add or update any part categories. It will be fully locked down and in an view only mode. I do need access to pull something down or force an update, but I don’t have any permissions to add or modify anything. I can only pull or sync things up.
			* User story – As any user, what if we have a disconnect between enterprise and transactional. How do we clean things up? Is this a manual process or are there automated tools.
				+ As a side note, there is a tool that allows for part categories to be flipped in bulk. It is not a standard tool, but could be made into a standard tool. Be aware of part categories, parts, items, po/invoice line items, sub inventory attributes, and other tie-ins.
	+ Note from Alan – Agile and scrum is not a top down command type approach. It is a more team based approach based on MVP requirements. Ownership comes from the team. This may take a little bit to change our mindset.

Notes from Cory – through GoToMeeting Chat…

Brandon, these are the notes from the project EOT: Phase 1= Control parent core values on items: Item Number, Item Type, Item Category, Description, Reference #, Cost per item, Salesprice, Use Mark-up, Unit of Measurement, Default Tax Category, Weight, Bin Number, Barcode Number, RFID number, Allow Discounts, Item Status.

Web core values: show item on the web, show price on the web, shipping type, shipping cost per item, weight, Dimensions, Web long description, web reviews, web specs and additional information, web video link, web alternate message, web related items.

Parent attributes, Flex grid, Photos

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Cory and Alan were going through a demo of the vendor catalog pieces

* As they were going through the vendor catalog, there was some talk about mapping. This helps with any future updates.
* They were going through pages, settings, and options. Lots of basic flow and showing push, pull, permissions, lockdowns, etc.
* You can push things down from enterprise to transactional.
* You can also request or pull down to transactional from enterprise

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Alan was saying that once a user story is created (ideally previously created)… the developers could then really break that down further in order to give an estimate (time or story points).

One of the main goals is, that the developer team really takes ownership on these user stories.

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Even though units of measure are small and not as many pieces. It may be a great baby step before we jump into part categories. Just an idea.