Inception Report

**Upgrading of the Job Management & Tracking System (JMTS)**

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Prepared by

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1. **Executive summary**

This report documents the scope of work and outlines a work plan as it relates to the Job Management & Tracking System (JMTS) software update and upgrade. The main activities undertaken in the effort to produce this report include the liaising with personnel of the Bureau of Standards Jamaica (BSJ), the National Compliance Regulatory Authority (NCRA) and the National Certification Body of Jamaica (NCBJ). Standard Operating Procedures (SOPs) and audited reports were also reviewed over the past month and a half.

1. **Needs Assessment**

A needs assessment was first conducted by meeting with the representatives from the follow entities;

* Engineering Division, Science and Technology Division, Finance Division, Marketing and Customer Services Department, Standards Division and the Industrial Training Unit (ITU), Legal Department and Corporate Office of the BSJ
* Personnel of the NCBJ
* Compliance and Construction, Foods Inspectorate and Legal Metrology departments of the NCRA

1. **Scope of Work**

{mention dealing with help desk and other issues during mobilization period.

1. **Work Plan**

Please start with a few lines of general description of the project background.

{insert monthly schedule...see MIS work plan}

{mention reporting schedule}

**Appendix**

Tables 1 to x

**Table 1: Features and Modifications for the Engineering Division**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Item #** | **Feature/Modification** | **Category** | **TAT \*** | **Comment** |
| 1 | Job to be marked completed only after the job costing is approved. | Job Tracking |  |  |
| 2 | Facilitation of sample hand over from one department to another. This includes “signing” when the sample is handed over. | Sample Tracking |  |  |
| 3 | The state of the sample when received is to be included into the sample record. | Sample Tracking |  |  |
| 4 | In client credit status dialog allow view credit/regular clients only. | Finance |  |  |
| 5 | Add of privileges for job costing approval with a department. | Access Control & Privileges |  | This will be done in accordance to how it is currently done in the JMTS. |
| 6 | Monthly report is to be standardized across the division and the name changed from Monthly Report to “Departmental Report”. The calculation of COTIF is to be standardized. Divisional and lab reports are to be created that also gives COTIF. | Reporting |  |  |
| 7 | Cost Scheduling and Proforma Invoice generation are to be included into system. | Finance |  |  |
| 8 | Designate laboratories and department units as cost centres and assign cost codes | Finance |  | Cost codes are to be assigned by the Finance division. |
| 9 | Turnaround times are to be reported for the Finance division. | Reporting |  |  |
| 10 | The equipment used to do tests/calibrations is to be associated with a job and reported. | Reporting |  | The list of equipment used by the labs is to be provided by Finance. |
| 11 | Add “lead generation” information concerning the reason a client will attend a training seminar for eg. {to be edited} | CRM |  | May be added to tracking section of client record for now. |
| 12 | Standard operating procedure to be modified to include sample transfer procedure as implemented by the JMTS. | Sample Tracking |  |  |
|  |  |  |  |  |

**\* TAT is the estimated turnaround time in working days required to implement the feature or modification.**