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 organizational 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.

The needs were analyzed and the scope of work and work plan were determined as follows.

1. **Scope of Work**

Following the analysis of the needs of the various organization entities, it was determined that a number of JMTS issues needed to be addressed and some features needed to be modified or new ones implemented. The software modules, described in the table below, will be added to the JMTS or modified in order to meet the needs of the organizational entities previously mentioned:

Table: JMTS Modules

| Module | Description/Comment |
| --- | --- |
| Job Management | This is the core module of the JMTS that will be updated and upgraded to meet the needs of the organizational entities. |
| Standard Compliance | This existing module will be revamped to further support the Compliance and Construction department of the NCRA. |
| Certification | This new module will support the activities of the NCBJ and the Certification department of the BSJ. |
| Foods Inspectorate | This existing module will be revamped to support the food factory registration activities of the NCRA. |
| Legal Metrology | This is an existing module that will be reactivated to support legal metrology activities pertaining to petrol stations and weighing instruments. |
| Task Management | This is a new module that will allow the assignment and management of tasks assigned to a department or individuals. |
| Legal Office | This is new module that will be an implementation of the existing Legal Department Portal web application that is currently used by the Legal department of the BSJ. The Legal Department Portal web application will be retired when this module is completed. |
| Service Request | This web service module will be implemented to offer support to external clients as it relates to service requests and job status updates. |
| Standards | This module will facilitate the management of the standard development activities of the BSJ. |
| Client Management | This module will provide basic Customer Relationship Management feature for use by the ITU and Marketing departments of the BSJ. |
| Financial administration | This existing module will be enhanced to allow personnel within the Finance division to configure the financial aspects of the JMTS. |
| System administration | This is an existing module that will be modified to allow more levels of control and configuration of the system such as the granting of access to the various modules of the JMTS. |
| Reporting | This is an existing general purpose module that provides the reporting needs of the other modules. |

During the first month and a half of the JMTS consultancy period, the core of the JMTS was redesigned to accommodate the additional modules that will be implemented.

The modules in the above table will be implemented in accordance with the work plan outlined below.

1. **Work Plan**

The following table outlines the work plan that will be followed during the upgrade of the JMTS:

Table: JMTS Work Plan

| Module/Activity | Estimated Turnaround Time | Description/Comment |
| --- | --- | --- |
| Job Management  Legal Office  Client Management | 1 month | During implementation all relevant documentation….  The appendix to this report lists the modifications and features that implemented in the JMTS during the execution of the above work plan. |
| Standard Compliance  Certification  Foods Inspectorate | 1 month |
| Legal Metrology  Task Management  Service Request | 1 month |
| Standards  Financial administration  System administration | 1 month |
| Reporting  Training  Documentation | 1 month |

**Appendix**

The following table lists the JMTS modifications and features that will be implemented in the JMTS.

**Table: JMTS Features and Modifications**

| **Item #** | **Feature/Modification** | **Module** | **Description/Comment** |
| --- | --- | --- | --- |
| 1 | Job to be marked completed only after the job costing is approved. | Job Management |  |
| 2 | Facilitation of sample hand over from one department to another. This includes “signing” when the sample is handed over. |  |
| 3 | The state of the sample when received is to be included into the sample record. |  |
| 4 | In client credit status dialog allow view credit/regular clients only. | Client Management |  |
| 5 | Add of privileges for job costing approval with a department. | Access Control & Privileges |  |
| 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 |  |
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