Inception Report

**Upgrading of Job Management & Tracking System**

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Prepared by

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1. **Executive summary**

This report outlines the plan of action as it relates to the consultancy to update the Job Management & Tracking System (JMTS). The main consultancy activities include the liaising with divisions and department of the Bureau of Standards Jamaica (BSJ) and the National Compliance Regulatory Authority (NCRA).

In addition to meeting with the …

1. **Needs Assessment**

After meetings were held with the divisions and/or departments of the BSJ and NCRA, the following needs were determined:

{Create table instead?}

Engineering Division

1. Addition privileges for job costing approval
2. Monthly report is to standardized across the division and the name changed from Monthly report to “Departmental Report”. The calculation of COTIF to be standardized. A divisional/lab reports to be created that also gives COTIF.
3. Procedure to be modified to include sample transfer procedure as is implemented by the JMTS.

National Certification Body of Jamaica (NCBJ)

{note that training will be required}

Finance Division

{note that training will be required}

Marketing and Customer Services Department

Science & Technology Division

Standards Division (including ITU)

{note that training will be required}

Legal Office

{note that training will be required}

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**

**Table 1: Features/Requirements and modifications**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **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. |
|  |  |  |  |  |
|  |  |  |  |  |

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