Inception Report

**Upgrading of Job Management & Tracking System**

March xx 2018

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.**

Status Update 2018-03-13

As part of the efforts to plan the way forward in terms of updating the JMTS, meetings were held with the various divisions within the BSJ, the NCRA and the NCBJ. The purpose of the meetings was to determine the requirements of the divisions and organizations so that the JMTS can be properly updated to meet their needs. Selected processes were also reviewed to determine additional software requirements for implementation in the JMTS. Meetings are still being scheduled and held in an effort to fully understand business processes so that effective solutions can be implemented.

The requirements and associated issues that were obtained during the meetings are being documented and analyzed for inclusion into the JMTS requirements and specification documents. The redesign of various aspects of the JMTS is also being explored so that these requirements and issues can be properly addressed during the update of the JMTS.

Although full development on the JMTS will begin in April, some minor requirements are being implemented to address immediate or urgent issues. For example, the assignment of representatives in addition to an assignee for job was implemented as an immediate need of the S&T division. Beta version 3.3 of the JMTS is scheduled to be deployed for use on March 26 following a successful testing of the system.

As part of the first deliverable, an inception report is being drafted and is scheduled to be completed within the next 2 weeks. This report will include, among other things, a detailed analysis of the information technology requirements of the BSJ, NCRA and NCBJ and it relates to the JMTS. However, a status report will be provided every Friday henceforth.

Regards,

Desmond

Status Update 2018-03-16

- Met with Jody of customer service.