ease Notes - Summary of TSE

- 1. New Features/Functionality Added
 - a) TSE module
 - Creation of a Tank
 - Processing samples
 - 1) Creation the samples.
 - 2) Postponing the sample
 - IOM Generation
 - Viewing status of created samples at different stages.
 - Finalizing the sample test report and forwarding the report to the customer.
 - Customer to SAP mapping Authority
- 2. Existing Features / Functionality Modified
 - a) This is first time release.
- 3. Existing Features / Functionality Removed
 - a) This is first time release.
- 4. Issues Resolved (Bugs if any)
 - a) This is first time release.



Release Notes - Details

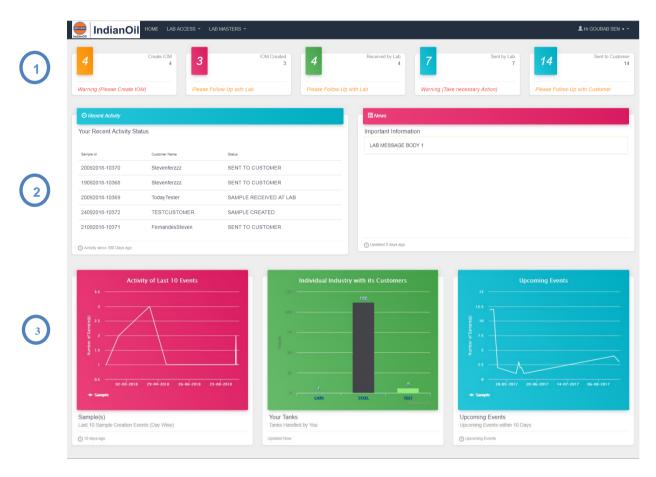
This software helps in condition monitoring program. There are two kinds of roles as of now—TSE and LAB.

Role TSE: Each customer will be mapped to a TSE. TSE will be getting notification alert mails. Once TSE logs into the system,

1.0 New Features/Functionality Added

1.1 Dashboard

All four roles have Dashboard after logging in.



Here, the first row 0, is cards with number of pending sample to be forwarded/check/approved/inbox depending on the selected



The second row contains two cards, the first one represent the recent activity done by the User. E.g. the samples received or sent lately. The second one represents the latest updates/new for the user.

The Final row ocntains three cards with all graphs in it. Where First represents the samples holding by that user (by role), the second represents the number tank handled by him. And the last card represents the number of events i.e. next samples to be taken within the next 10 days.

1.2 Automatic mail notification to TSE:

Description of functionality:

Each customer will be mapped to a TSE. TSE will be getting notification alert mails regarding how samples are due for condition monitoring keeping controlling office of TSE as CC with the subject "Alert: Pending samples as on: <current_date>" and each records are having different color based on how long these are due. It provides summary reports about how many samples are due on a due date.

From: servocmp@indianoil.in

Cc:

Das, Samrat (सम्राट दास)

Subject: Alert: Pending samples as on: 06-06-2017

Dear AK Verma,

Please find the below summary of Oil samples due for Condition Monitoring:

Customer Name	Sample Due Date	No of Pending Samples	
Rashtriya Ispat Nigam Limited	16-05-2017	12	
Rashtriya Ispat Nigam Limited	19-05-2017	12	
Rashtriya Ispat Nigam Limited	22-05-2017	2	
Rashtriya Ispat Nigam Limited	05-06-2017	3	
Rashtriya Ispat Nigam Limited	07-06-2017	3	
Rashtriya Ispat Nigam Limited	08-06-2017	3	
Rashtriya Ispat Nigam Limited	09-06-2017	3	
Rashtriya Ispat Nigam Limited	11-06-2017	3	
Total	41		

Due Date > 15 days | Due Date > 7 days | Due Date <= 7 days

Click here to login: http://10.146.65.10/LUBES

*** This is a system generated email. Please do not reply to this email id. ***



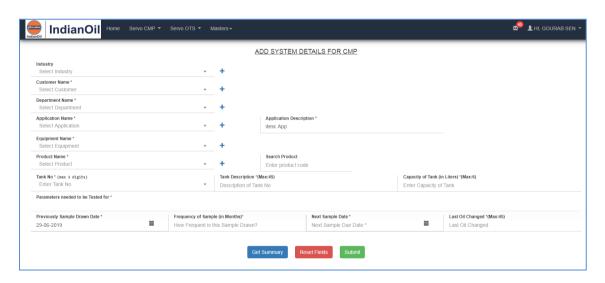
1.3 TSE Role:

If TSE logs into the system successfully then number notification will be shown i.e. how many samples need to be created.



1.3.1 Tank Creation/Updating:

For Creation, go to Masters -> System Details
It will show you a form for creating a tank. Here, all fields are compulsory.



The buttons are used for adding a new option against the respected Field.





(E.g. for industry, on clicking the button a new option will be added to industry and an Industry will be added in the Masters table of Industry).

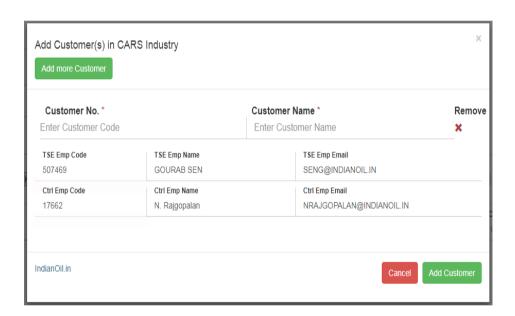
On creating the tank, TSE have to fill the following Fields.

Industry

The TSE selects an Industry from the dropdown. Only TSE Admin has the rights to add an industry.

Customer

The TSE selects a Customer from the dropdown. Where the customers are filter based on the selected industry. The TSE has the rights to add a new Customer for the selected Industry.



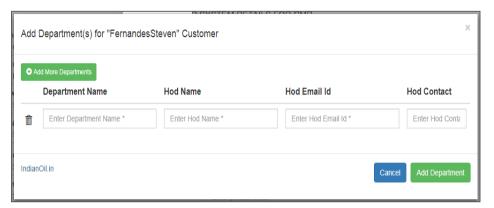
Here, Customer Number is 8 digit custom number. The bottom six fields are fixed field filled automatically depending on which controlling officer is the current logged user assigned. Even the user's details are provided.

On clicking Add more Customer , another row will be appended for adding of multiple customers. On clicking , the aligned row will be deleted.

Department

The TSE selects a department from the dropdown. Filter w.r.t the industry selected. The TSE has the rights for adding a new department.





On clicking Add More Departments, another row will be added for adding multiple departments. On clicking , the aligned row will be deleted.

Application

The TSE selects a department from the dropdown. The Application is doesn't have a relation to other objects. Only TSE Admin has a right to add an application. A TSE doesn't have the permission to add a new application and pop error will appear saying that the person has insufficient rights.

Equipment

The TSE selects a department from the dropdown which gets filter by all the equipments created by labs. The TSE has the rights for adding new equipment. If the user selects 'Others' option in Make Name, a text field appear beside it for entering remarks against a make not registered.



Product

The TSE selects a product from the dropdown. Here, the dropdown is filter after entering a valid product Code in the given right-side of the field.





On entering a valid Product code, the product dropdown will be filtered with the product Code & Product Name.



Only TSE Admin has the rights to add a product. There is also a new option 'OMC Product'



After selecting, the last row will be hidden and two new fields will appear (Grade for entering the grade of the OMC product and similar product for selecting a product which have a common test parameters linked to it).

Tank

Once the above fields are entered, the Tank No. field will be filtered with the existing tank belonging in this entered map (Industry->Customer->Department->Application->Equipment->Product).

Note: The dropdown is not for selecting, it is only provided as a reference if the TSE is entering a duplicate tank.

Here, there are two types of tanks, One with servo product and one with OMC products. The difference in these both tanks are when servo product is selected the sample frequency and dates can be edited but if OMC product is selected there is a no need of frequency as all OMC product tanks are only made for One Time sampling (Discussed ahead).

Test Parameters

Here the default test parameters are selected for test. The TSE officer can remove the unnecessary ones which are not required for testing the samples.





On clicking Get Summary, the given tanks are shown in the below table.

Department ↓↑	Application ↓↑	Equipment ↓↑	Product ↓↑	Tank No ↓↑	Tank Description ↓↑	Prev Sample Date	Next Sample Date	App Desc ↓↑	Remove Tank ↓↑
DEPTTEST	TEST APP	MECHATEST	SERVO STEEL 680	TK1	new tank 2	12-09- 2018	12-11- 2018	for testing TK1	â

After entering the tank number, tank description and Capacity of tank (e.g. 550ml). The TSE has to select the parameters required while the test is made against the sample taken from this respected tank. Here KV@40, TAN and VISCOSITY INDEX.



All these fields are mandatory and needed for documentation for the future. The previous sampling date for new tank are set by default.

On Submitting the form, a new tank will be created. And will appear in **Servo CMP** Process Sample Create/Postpone Sample page and ready for creating a sample.

1.3.2 Process Sample:

Go to Servo CMP→Process Sample

Once a sample is taken from the tank, it cannot be deleted from the database. It will show all the samples due for condition monitoring. For each sample, TSE will have to take either of these two actions:

- 1. Sample Creation
- 2. Sample Postponing

Below is the respective screenshot of the summary of due sampling.

(Ver.1.0.0 dated 28.09.2018)

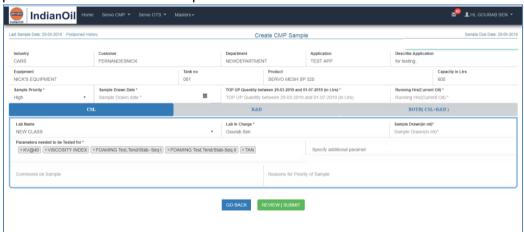




All these summaries of samples are sorted (descending order) based on "Revised Sampling Due Date" value and deferred no is how many times that sample is postponed for this time. In ideal situation "Last Sampling Date" and "Next Sampling Due Date" are same and so "Deferred No" is "O".

1.3.2.1 Sample creation:

Sample can be created by clicking on icon and accordingly TSE has to enter respective data related to sampling. Some attributes related to the sample are read and write only. TSE has to specify the test parameters which are needed to be tested. Some test parameters are pre-populated and some test parameters are to be selected using specify additional parameters. TSE can remove the test parameters which are not required.





Attributes like "Industry", "Customer", "Department", "Application", "Equipment", "Tank No"," Product", "Capacity in Liters" are read only.

TSE has to specify the below attributes —

- 1. Sample drawn quantity in ml.
- 2. Sample drawn date (all dates prior to some specified future days with respect to sample due date will be enable and all other days will be disable).
- 3. Top up quantity between < last sample date > and < today's date > in Liters.
- 4. Running Hrs of Current oil.
- 5. Selection of LAB (Lab In Change will be auto-populated upon selection of LAB).
- 6. Priority of Sample (drop down selection).
- Addition/Deletion of parameters needed to be tested for along with Addition/Deletion of Specify additional parameters to be tested for.
- 8. Comments on Sampling and reasons for priority of sample.

Some of these fields are mandatory and some are not. Presence of * in a field indicates that the field is mandatory.

Submission without entering data in the mandatory field will show error.

While creating sample, the TSE has two types of samples he/she can create i.e. CMP Sample and One-Time Sample

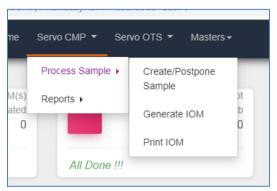
CMP Sample: In CMP Sample the sample are drawn in monthly frequencies. For these samples the list is filtered by tanks which have their sample due date have come close.

One-Time Sample: In One-Time Sample, the sample is drawn whenever required by customer. For these samples the list is filtered by all tanks available for drawing a sampling or has drawn a sample which has already been tested.

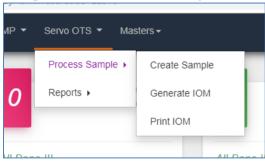
Note: Once a sample is made against a tank the same cannot be taken unless the previous sample is taken and tested against the same tank.

Navigation for CMP Sample:





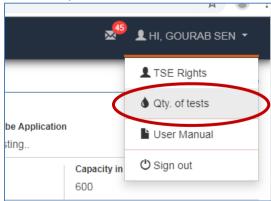
Navigation for One-Time Sample:



There are two types of Labs: CSL And RND. A sample can be sent to one of the three types of labs: CSL, RND & CSL-RND labs. A single sample is sent for CSL & RND labs whereas for CSL-RND Labs two samples are sent: one for CSL and second for RND.

Here, in CSL-RND Lab Sample there are duplicate attributes for sending both CSL and RND Labs i.e. test parameters Sample's quantity drawn, the lab to be sent to and its lab user (pre-defined). The Lab and the lab user are selected dynamically depending on the product category for RND Labs and TSE employee-code linked to labs for CSL Labs.

Note: Kindly enter the sample quantity properly for the respected sample. Test Parameter quantity can be calculated for Qty. of Test viewed from the page in the left top corner.





During submission of data i.e. creation of sample, system asks for confirmation for the sample data entered whether ok or wants to edit.

If any data is to be changed then by clicking "Cancel", user can modify the same. Otherwise, user can click "OK" and create the sample.

After creation of sample successfully, it redirects to summary page with the message "Your Sample Has Been Sent to LAB for Testing SUCCESSFULLY" along with the

"Your Sample ID is: 07062017-10571". Sample ID is distinct for each sample which has been created. Sample ID is started with date "07062017" i.e. it has been created on 07th June, 2017(07/06/2017).



1.2.1.2 Sample Postponing:

Sample can be postponed by clicking on icon and accordingly TSE has to enter respective data. Attributes like "Industry", "Customer", "Department", "Application", "Equipment", "Tank No"," Product", "Capacity in Liters", "Parameters needed to be Tested for" are read only.



To know the postponed history, User needs to click the link "**Postponed History**" and it will show the respective history.

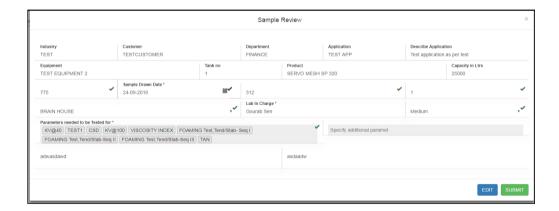






TSE has to put date till what he/she wants to postpone and there is also provision to enter reason for postponing the same.

During submission of data i.e. postponing of sample, system asks for confirmation for the sample data entered whether ok or not.



If any data is to be changed then by clicking "Cancel", user can modify the same.



Otherwise, user can click "OK" and create the sample.

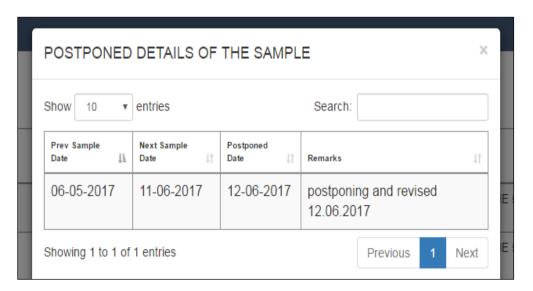
After successful postponing of the sample, it redirects to the summary page with the message "Your Sample Date Has Been Postponed SUCCESSFULLY".



From the summary page, TSE can view the postponed history of a sample.



After clicking on "**Deferred No**" value, postponed history can be viewed as grid summary.

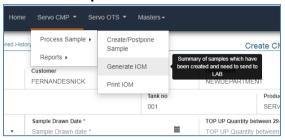




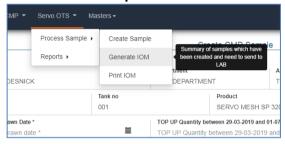
1.3.3 IOM Generation

Under After processing an sample the TSE officer has to generate an IOM out of it in:

For CMP Sample:



For One-Time Sample:



The IOM acts as a reference to one or more sample created on the same time It contains info about what tank to test, how quantity to be drawn, the date of when the sample was drawn and which lab it is assigned to. This IOM is later printed and send to the Lab.

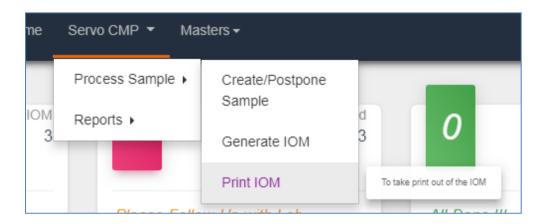


Here the TSE officer selects the lab he/she has created the sample for sending and against it generates an IOM by clicking on View IOM .



The How to Select? above the top left corner of the table can give yuh instructions on how multi-select rows and generate an IOM against it.

The TSE is also allowed to View the sample again and make changes if needed. After generating the IOM, the IOM is send to the Lab given in the sample for testing. For a reprint the TSE can go to **SERVO CMP -> Process Sample->Print IOM**.



1.3.4 Reports:

Every Report has four dropdown at the top used for filtering the table. Namely,.. Customer, Department, Application & Product. Under reports, there are currently 4 type of reports are available

- Sent to Lab
- Received by Lab
- Sent by Customer
- Send to Customer

1.2.2.1 Sent to Lab:

Go to Servo CMP→Reports→Sent to Lab

Once sample has been created and sent to LAB, summary of these samples are shown under this summary grid. These are the samples which are yet to acknowledge by the LAB

Depending on priority of the sample, the respective records will be appearing in different color as shown in the legend too.

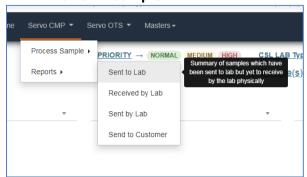


Also Depending on the type of sample two legends are affixed above the table

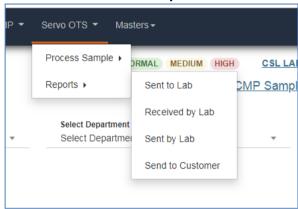




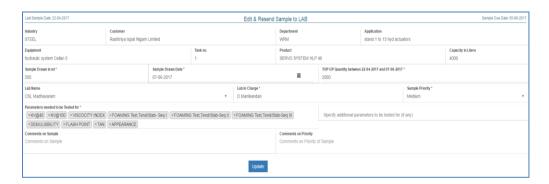
For CMP Sample:



For One Time Sample:



By clicking on the sample ID, TSE can view the details w.r.t the sample ID and accordingly TSE can update the same. TSE can modify respective data and update the same. But TSE has to ensure that the same sample is being sent to LAB physically also.





During updating for the same, system asks for confirmation and does the mandatory field validation. If it passes, the sample is being updated.

1.2.2.2 Received by Lab:

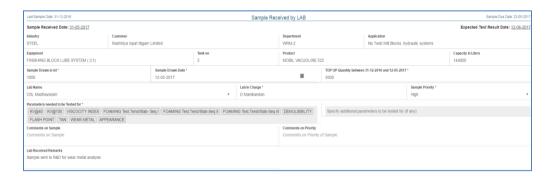
Go to Servo CMP→Reports→Received by Lab

Summary of the Samples, acknowledged by the LAB upon received the same physically are shown here so that TSE can view what are the samples which have been acknowledged by the respective LAB upon received the samples physically.



By clicking on the Sample ID, TSE can only view the details of the respective sample along with the sample receive date and expected test result date.

TSE can't modify any data in this page.





1.2.2.3 Sent by Lab:

Go to Servo CMP→Reports→Sent by Lab

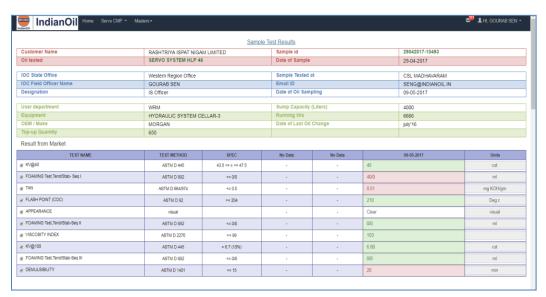
TSE can view the summary of the samples for which data have been entered by the Lab in Charge of the respective LAB.

The records are appearing with different color with respect to type of priority.



After clicking on the sample ID, TSE can view the details of the test result entered by the LAB and can view the trend chart based on the available data. TSE can view the file if LAB uploads any file corresponding to that sample ID.

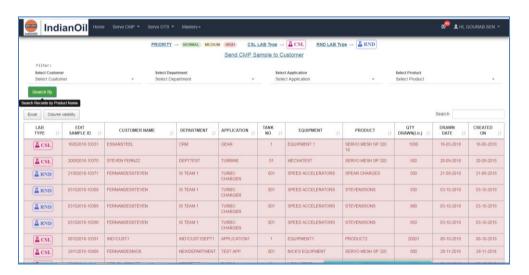




1.2.2.4 Sent to Customer:

Go to Servo CMP→Reports→Sent To Customer

TSE can view the summary of the samples for which mails have been sent to respective customers.



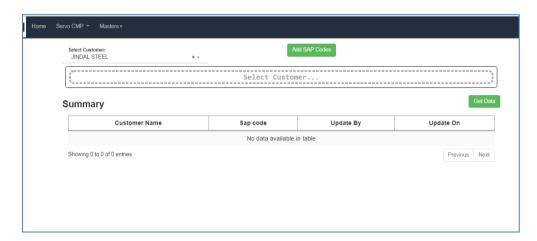
After clicking on the sample ID, TSE can view the details of the test result entered by the LAB and can view the trend chart based on the available data along with the file mailed to the customer with the link under "CMP Test Report". TSE can resend the mail to the customer.





1.3.5 Mapping of Customer & SAP code

Go to Masters → Customer-SAP Mapping

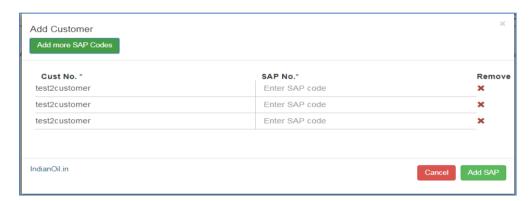


Here, on selecting customer, its SAP code mapped to it will be displayed.





On clicking the SAP code a modal will appear for editing the given SAP code. If a new SAP code needs to be added, then click Add SAP Codes for adding.



On clicking the add button, this modal will pop up for adding multiple SAP code against the given customer.

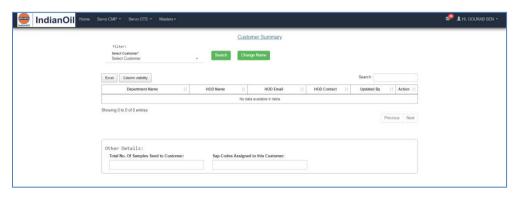
Add more SAP Codes

For adding more rows

For remove the aligned row

1.3.6 Customer Summary





Customer Summary is page for viewing the details of all the customer. Here the user selects a customer in 'Select Customer' and clicks on search. On search, the department under that customer will display in the table and also display how much sample the customer has received and total SAP code created for that customer.

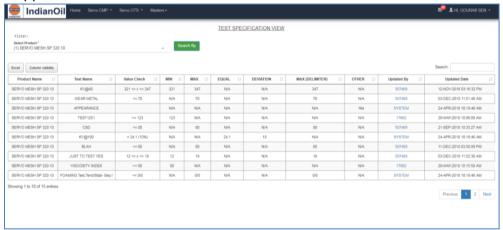
The TSE can also change the customer name by clicking on customer change button.



For changing the customer Name kindly select the customer in the dropdown beside it. Once selected, a modal will appear for entering the new customer name.

1.3.7 Test Specification

For checking if the product used for creating a tank has valid test parameters mapped or not.

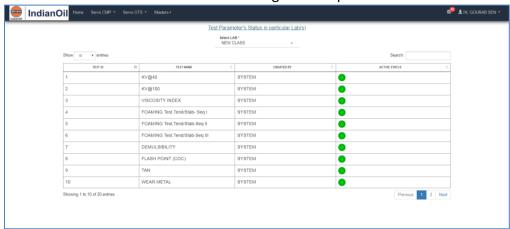


This is a read only page. For editing/mapping the test parameters, kindly inform the respected TSE Admin for mapping/editing the required product.



1.3.8 Test Parameter Status

In this page the TSE can check for the test parameter of individual labs. E.g. Checking if Test Params (KV@40) is available at a CSL Lab or not. A validation is also filtered during the creation of a sample to keep in check a sample is not created if the lab cannot do a test on the given sample.



The green icon in the last column signifies for the test is available for the selected lab (from the dropdown) whereas a red icon signifies for inactive status.

2.0 Existing Features/Functionalities Modified

This is the first release.

3.0 Existing Features/Functionalities Removed

This is the first release.

4.0 Issues Resolved(Bugs If any)

This is the first release.