Buyers Ownership/Inbox and Time Tracking

Goals:

(1) To improve the process flow of Parts Requests, particularly related to 'Buyers'. Buyers refer to the people who have to order stock when it is not available on site. The missing feature here is the communication between the 'Storeman' and the 'Buyer', specifically in that the requests are done via email. We want to make it system based, that the Storeman can mark on the system that 'Buyer Action Required' which would then appear in the new 'Buyers Inbox'.

(2) to create a 'Time Tracking' report that showcases the amount of time it takes between each step of the Part Request process. Each part of the process is timestamped, but a consolidated view currently does not exist. The idea is twofold, firstly, to be able to follow the timeline of a specific part request horizontally. Secondly to illustrate the average time it takes each person to complete their part in the chain over a specified date range.

How a 'Parts Request' works:

A parts request goes through the following phases (**with new Buyers Ownership to be added**)

1) **Mechanic makes a text request for items/parts**
   This is called a Parts Request (PR) and has a unique PR number. Each PR is linked to a job card.
   a. Find job card -> parts requests -> add new parts request
   b. Eg /move/partsrequest.phtml?req=NEW&jobcardserial=1621451
2) **Supervisor approves (or rejects) the parts request**
   a. Parts requests -> approve
   b. /move/partsrequest.phtml?mode=U
   c. (or goes directly to the PR by clicking link in email)
3) **If in stock -> storeman takes ownership -> creates a picking slip -> If picking slip is over R5000, a 'master' approves the picking slip -> then the mechanic 'receives' the stock.**
   a. Parts Requests -> Issue Stock
   b. Parts Requests -> Receive
4) **If some/all items not in stock -> storeman takes ownership -> currently use 'send email' function to involve the 'buyer'**
   a. [NEW feature on existing page] We need a button the storeman can click on that says "BUYER ACTION REQUIRED" – update BUYER_REQUESTED_DATE and BUYER_REQUESTED_BY (who requested) - This PR will then be added to the new 'Buyers Inbox'.
   b. [NEW feature on existing page] The buyer then clicks on the 'Accept/Take Ownership (Buyer)' button – update BUYER_OWNER and BUYER_OWNER_DATE.
   c. [Existing] Once the parts have been ordered, the buyer clicks on the 'Set PARTS ON ORDER' button. the PR number MUST be put on the order in order to link them.
   d. [Existing] In the in-between time while waiting for delivery, the buyer is responsible for following up.   These orders will show in the new screen called the 'buyers inbox'
   e. [Existing] When the storeman / receiving clerk takes delivery, it allows them to create a picking slip (as long as the PR was tagged against the order)

f. Go Back to point 3 for picking slip and receiving of goods by mechanic

Buyers Inbox:

A new page/view from the perspective of the 'Buyer', which lists all the open (non-finalized) PRs that have been flagged as 'Buyer Action Required' as well as the PRs they have taken ownership of. MOVE_JOBS_PART_REQUESTS.BUYER_OWNER + BUYER_OWNER_DATE [needs to be added]

Specifics: <mark>(Keith please help here)</mark>

- Section 1: PRs needing a buyer:
  - select * from MOVE_JOBS_PART_REQUESTS where BUYER_REQUESTED_DATE is not null and BUYER_OWNER is null. (join this with MOVE_JOBS to show the depot as well)
- Section 2: My PRs that I am an owner of: = select * from MOVE_JOBS_PART_REQUESTS where BUYER_OWNER = $my_person_serial

- **Columns:** Jobcard, PR number, Requester, Part Requested, Days Open (reuse existing code and layout)
- Highlight the rows in red where the order has been open for more than 7 days and has not been received.

Time Tracking Report:

We need to report on the delays – how long is each step taking. The idea here is to start tracking and reporting on the times at which certain actions have been completed by the various people involved in the process of a PR to see where delays are occurring. If these things are being tracked, to generate a report/table to illustrate this information. Three items, the Stage, Business Function and the Person's Name.

List of things to track, in order:

- Captured (Mechanic) MOVE_JOBS_PART_REQUESTS.CAPTURED_BY + CAPTURE_DATE
- Approved (foreman/RTM) - MOVE_JOBS_PART_REQUESTS.APPROVED_BY + APPROVED_DATE
- Second Approval (where above R5000) – (foreman/RTM) STK_PICKING_SLIP.APPROVED_BY + APPROVED_WHEN
- Ownership taken (Stores) - MOVE_JOBS_PART_REQUESTS.ACCEPTED_BY + ACCEPTED_DATE
- (if purchase required)
  - Buyer requested (Stores) - MOVE_JOBS_PART_REQUESTS.BUYER_REQUESTED_BY + BUYER_REQUESTED_DATE [needs to be added to table]
  - Ownership taken (Buyer) MOVE_JOBS_PART_REQUESTS.BUYER_OWNER + BUYER_OWNER_DATE [needs to be added]
  - Flagged on order (Buyer) MOVE_JOBS_PART_REQUESTS.ON_ORDER_BY + ON_ORDER_DATE [needs to be added + code updated]
  - Delivery (Stores)
- Picking Slip creation (Stores) – STK_PICKING_SLIP.FINALIZED_DATE + CREATED_BY

- o Note: you can have multiple picking slips per PR
- Time received (Mechanic) – STK_PICKING_SLIP.RECEIVED_BY + RECEIVED_DATE
- Finalization (Stores) – MOVE_JOBS_PART_REQUESTS.RECEIVED_DATE

Visual aspect: like mentioned before, it makes sense to have two different 'views/perspectives' by which you look at this. 1) would be a tabular view where the whole timeline of the Parts Request from beginning to end is represented in its own row, with the columns indicating the different timestamps associated with each step and person/business function responsible.