**ITC ERP**

**Client Discussion Document**

**Changes discussed on 03-June-2017**

**[Total: 21 Hrs.]**

1. What happen if two department type have same department name like

In food – ICPMS

In Pharma also – ICPMS

Will we add record two times in two different department type?

Also provision to provide multiple department to one employee. **[5 Hrs.]**

1. Insertion of global Countries, states and cities table in the database. **[8 Hrs.]**
2. Creation of Master Records in the excel sheet for the insertion of all records in the Master tables in the database. **[8 Hrs.]**

**Changes discussed on 07-June-2017**

**[Total: 27 hrs.]**

1. Linking of the 0 level product categories to Test Modules. **[8 Hrs.]**
2. Order Form Changes: **[20 Hrs.]**

Fields:

* Order date and Time-Date time will be displayed at viewing the order
* Sealed/unsealed-select box\*
* Signed/unsigned –select box\*
* Brand-input
* Packing Mode-input\*
* Sampling Date and Time-datetimepicker\*
* Security Code/barcode-input
* Quotation No-input
* Submission Type-select Box-Direct, Courier, Marketing Executive
* Actual Submission Type-input
* Invoicing Needed-Checkbox if ticked then below two fields will display
* Reporting To: textarea
* Invoicing To: textarea
* Expected Due date and time –it will be calculated based on test parameter days and time
* Surcharge field: on changing the Sample Priority to Urgent-Input type –user will enter-it should be amount
* Using One Order form to book multiple sample using same customer information but having different order number.

**Changes discussed on 08-June-2017**

**[Total: 37 Hrs.]**

1. Order Process Scheduling Flow: **[4 Hrs.]**

* Creation of department head.
* Creation of Analyst.
* Assigning Job to the analyst by the department head.
* Analyst wise job scheduling.

1. Invoicing and Pricing Flow: **[4 Hrs.]**

* Based on billing Type:
  + - * 1. Daily
        2. Weekly
        3. Monthly
        4. Regular
        5. PO based.
* Price Based on:
  + - * 1. Product wise rate
        2. Party/Customer wise fixed rate
        3. Parameter wise rate
        4. ITC wise rate

1. Template Design: **[29 Hrs.]**

* Order:
  + - * 1. Operator Template
        2. Analyst Template.
* Report:
  + - * 1. Food Template
        2. Pharma Template
* Invoice Template

**Changes discussed on 27-June-2017**

**[Total: 46 Hrs.]**

1. Sample Receiving at reception form which will include the following fields: **[6 Hrs.]**

* Section Name-O Level Product Category
* Customer Name of Master Table or if not available then input type
* Mode: By Hand/ By Courier
* After adding this data, a Booking ID will be generated with format:

SECTIONDDMMYYS0001

* Then this booking ID will be populated as a select box in the Order Booking Form.
* Also Order will be booked by the Employee according to the Section Categories. If he/she belongs to Food Section, then he can only book the order of Food Section and in Tree View Only Food Section Categories will be display.

1. Scheduling Form Changes: **[18 Hrs.]**

* Tentative Date should be selected from date picker.
* Tentative time should be 12-hour format
* Implementation of Job Sheet Window:

In this window, job allocator, will analyses the order parameter detail if he/she finds any error, then he/she can able to edit the order parameter detail mainly parameter name, equipment name, method name.

1. Order Form Changes: **[10 Hrs.]**

* Security or Barcode Field-It will be auto generated as barcode.
* Sample Priority select box value values will be provided by the Client. Only surcharge value in amount will be added to the Very Urgent Priority Sample. Value: Normal, Urgent, Very Urgent-Surcharge Amount
* Add (Rs) in surcharge vale label and place holder.
* Sealed/Unsealed select box value will be provided by client. Value: Sealed, Unsealed, Intact, N/A
* Sampling Date should have a provision to add a time with date also-using date time picker.
* Adding of a field ‘Payment Mode’ which work as follow:
* Direct:
* Cash: - receipt no, date,Amount
* Cheque: -Date,Cheque No, Bank Name
* Courier
* Expected Due Date:

EDD = It will be calculated on highest Time taken(days) by any parameter of a particular Product Testing

+

If booking date after 2.00 PM, then

EDD = +1 day

+

And if there is a Sunday in between booking date and EDD, then

EDD = +1 Day more

+

And finally if EDD after calculation lies on Sunday, then

EDD=+1day more

* Provision to select the required parameter only at the time of selecting the Product Test in order form.

When analyst select any Product Test, then a popup will open with all sorts of parameter added in that particular Test, then parameter will be selected from that window.

* Provision for editing and cancellation of order:

If any order is canceled, then no reporting and no invoicing will be done.

If any order gets edited, then order will be edited any to the role i.e.

If it is Booking Person who is only adding the order, then he can edit the customer and sample detail only and

If it is a Job Analyst, then he can only edit the Parameter name, method name and test related detail only.

1. Process Flow of Order from Sample Booking to Invoicing: **[11 Hrs.]**

**Step-1**: Sample Receiving Code Generation with format: SDDMMYYS0001

Where:

S-Section Name, DD-Date, MM-Month, YY-Years-Sample Notation, 0001-Serial which will reset to 0001 on month change.

**Step-2**: Order booking corresponding to Sample Receiving Code of Step-1

Where:

* Generation of Barcode of Order Number,
* Email Confirmation of Sample Booking to the Party/Customer

**Step-3**: Job Scheduling/Job Allocation where:

* Job Allocation to Analyst
* Review and rectify the order parameters details
* Print Out the Job Sheet

**Step-4**: Testing and filling of Test Result by the analyst in addition of calculation sheet and Raw Data sheet in system.

**Step-5**: Report Typing (Part B and Part D of Report Template)

**Step-6**: Reviewing of Report.

**Step-7**: Finalize Report by the In-charge.

**Step-8**: Final Approval by QA Department

**Step-9**: Invoice Generation

Where:

* PDF Generation of Invoice.
* PDF Generation of Report.
* Auto Emailing of PDF Report and PDF Invoice to the Party/Customer.

**Step-10**: Printing of Labels (Party/Customer Address to be used for dispatching Report and Invoice Hard Copy).

**Changes discussed on 14-15-July-2017**

**[Total: 10 Hrs.]**

1. Report Date Updation: **[4 Hrs.]**

Report date will be update at the time of generation of PDF Report.

1. Dispatch Date: **[3 Hrs.]**

Dispatch Date will be update by the dispatcher with a button that prompt a confirm and after confirmation the dispatch date will be updated in the order master table.

1. Reporting Section (Part B & D): : **[3 Hrs.]**

For Part D Section:

All the below listed option will be populated in a select-box with corresponding to sample name, Standard name and Amendment No.

Option:

* Party has asked for Above Tests Only.
* The above submitted sample is of standard quality with respect to the above tests.
* The above submitted sample is not of standard quality with respect to the above tests.
* The above submitted sample of ***sample name*** conforms to as per ***standard name*** (***with upto date amdts-if has amendment no. else blank)*** with respect to the above tests.
* The above submitted sample of ***sample name***does not conform to as per ***standard name*** (***with upto date amdts-if has amendment no. else blank)*** with respect to the above tests.

**Changes discussed on 17-July-2017**

**[Total: 21 Hrs.]**

1. Test Parameter: **[4 Hrs.]**

* Add Test Parameter: Need Provision to add data like H2so4, a3, b3

1. Product Test: **[4 Hrs.]**

* Description Category: On adding this category all required field will be removed.
* And On Reporting Section (Part B and D), it should be editable to add the description which will be displayed in the Part C section of Report.

1. Order Form**: [4 Hrs.]**

* Supplied by and Manufactured by will be populated with Customer Name upon checking the checkbox add on Supplied by and Manufactured by Label.
* Submission Type will be populated by the sample receiving code detail.
* Change the label of ‘Invoicing Needed’ to ‘Different Reporting and Invoicing Address’
* Cancellation of order ‘button’ should be at any stage.
* Without Sample Rec No., the user will not able to add any data in any field
* On Order Date, Order Booker can only able to add the order of current date only and admin can add in all dates back and future.

1. On Adding of Method: Uniqueness should be checked on method name + Equipment Type **[1 Hrs.]**
2. On Adding Test Parameter:

* Provision to add one Parameter in Multiple Equipment Type with validation check of uniqueness. **[4 Hrs.]**

1. On Adding Test Parameter on Product Test: **[3.30 Hrs.]**

* the method list will not filter based on Section Category and Equipment Type. As method name is not associated with any parameters in Pharma Section
* Time Field: Add 00:00:00 default value
* Provision to display Equipment Type select Box.

1. Add Customer: Add column for GST\* – Input type after TAN No. **[30 Mins]**

**Changes discussed on 18-19-July-2017**

**[Total: 9 Hrs.]**

1. Tree View: Viewing of Tree Structure up to nth level. **[6 Hrs.]**
2. Test: **[3 Hrs.]**

Testing product:

* Remove required from Product Bar-code
* Copy the Product Name in Product Description while adding the Testing product.

Equipment:

* Copy the Equipment Name in Equipment Description while adding the Equipment Type.

Method:

* Copy the Method Name in Method Description while adding the Method.

Parameter Category:

* Copy the Parameter Category Name in Parameter Category Description while adding the Parameter Category.

Test Parameter:

* Copy the Test Parameter Name in Test Parameter Description while adding the Test Parameter.

**Changes discussed on 20-July-2017**

**[Total: 30 Hrs.]**

1. Product Tests: **[5.30 Hrs.]**

* Add Test Parameter-While adding ‘Description’ Parameters, a new input will be added in the form and result fields will populates with ‘N/A’ values.

1. All over the site: **[1 Hrs.]**

* Please make the data case standard i.e. First Letter Upper of each word.

1. Printing of Analysis Sheet:

* Printing of Analysis Sheet with Analysis Calculation Sheet according to equipment Type of the Order Parameters.

1. Format Change: **[2 Hrs.]**

* Sample No: F-YYMMDDS0000,
* Order No: F-YYMMDD0000

1. Scheduling: **[2.30 Hrs.]**

* While assigning a job to analyst, provide provision to assign one and reflect in all the parameters of that order. (Add checkbox)

1. Tester Login: **[2 Hrs.]**

* Display only Part C Section.

1. Reporting Section: **[4.30 Hrs.]**

* Can check Part B, C, D and if he/she finds any error in Part C (test result), then it will move back to the analyst for testing

1. Reporting Reviewing: **[5.30 Hrs.]**

* If any issues occur in any section, then it will move back to this section.
* Add checkbox in front to test parameter in case he/she finds any issues in the result.
* He can also able to edit Part A, B, D Section and can move back the process to analyst if he/she finds any issues in the test result.

1. Dispatch Section:

* Implementation of Envelop Template.
* Printing of Envelop Template.

1. Description Category and Description Parameters: **[7 Hrs.]**

* Add Description Category and Description Parameters for all Departments and display it at the time of booking an order with test parameters name as **Description** and rest in all tds the **description value.**

**Changes discussed on 25-July-2017**

**[Total: 25 Hrs.]**

1. Order Master Table Changes: **[30 Mins]**

* ALTER TABLE `order\_master` ADD `booking\_date` DATETIME NOT NULL COMMENT 'Current Date of Order Booking' AFTER `order\_date`;

1. Report Detail Table Changes: **[1 Hr.]**

* ALTER TABLE `order\_report\_details` ADD `report\_no` VARCHAR (255) NULL DEFAULT NULL AFTER `report\_id`;
* ALTER TABLE `order\_report\_details` ADD `report\_date` DATETIME NULL DEFAULT NULL AFTER `report\_no`;

1. Sample Table Changes: **[30 Mins]**

* ALTER TABLE `samples` ADD `internal\_transfer` TINYINT(4) NOT NULL COMMENT '1 for internal transfer' AFTER `sample\_status`;

1. Order Number Generation: **[4 Hrs.]**

* In case of Pharma Department-

Order Number will be generated according to Date, Month and Department.

* In all rest department-

Order Number will be generated according to Month and Department.

1. Global Back Date Booking Setting for all Department: **[1 Hrs.]**

* Back Date booking provision in pharma section should be opened.

1. Generation of Report Code and report date: **[7 Hrs.]**

* Generation of Report Code and Report date during Reporting Section (During addition of part B & D). Format will be same as booking code.

1. Order Booking**: [2 Hrs.]**

* Test Parameter category will be above on assay parameter category. (Test parameter sorting will be according to the creation of Product Tests.)

1. Internal Transfer of Sample Receiving code**: [4 Hrs.]**

* If a box has samples of two departments then one department will internally transfer the sample receiving code to second one for the respective sample booking. (Add Checkbox in front of Sample Receiving, Code in order form of label **Internal Transfer**)

1. Changes Regarding Pharma: **[5 Hrs.]**

(a) In order Booking form we have to specify header note (input if not found and selection from list if found) & real time stability(input) note during booking (Add two checkbox of Header Note Required and Real Time Stability, if checked then I will be populated in the order from below the sample Parameter detail).

Some Standard Header Notes Are (Select box values): -

1) Each Film Coated Tablet Contains

2) Each Uncoated Tablet Contains

3) Composition

4)Each Hard Gelatin Capsule Contains

5)Each Enteric Coated Tablet Contains

6)Each ml Contains

7)Each Vial Contains

8)Each sustained release contains

(b) Stability Report Formats: - As Given to Mr. Praveen (Before & After Report Provision and also creation of its master)

(c) Parts Master Creation and report creation (In case of injection with syringe): - separate report will be made for injection & syringe having same report no.

**Changes discussed on 04-Aug-2017**

**[Total: 5 Hrs.]**

1. Product Master Alias Table Changes: **[30 Mins]**

* ALTER TABLE `product\_master\_alias` ADD UNIQUE KEY `unique\_index` (`c\_product\_name`, `product\_id`)

1. Order Form Changes: **[4.30 Hrs.]**

* On Selecting the Sample Name, the Test Product Name will be populated according to the Sample Name.

**Changes discussed on 14-Aug-2017**

**[Total: --]**

1. Templates Changes:

* All Template should be in Patriot Size.
* Food: Job Order, Analytical Sheet, Report and Invoice.
* Pharma: Job Order, Analytical Sheet, Report and Invoice.

1. Pharma Report:

* Part D Section missing in viewing Test Report.

1. Invoicing Structure according to department Wise.
2. ALTER TABLE `method\_master` ADD UNIQUE KEY `unique\_index` (`method\_name`, `equipment\_type\_id`,`product\_category\_id`);

**Changes discussed on 18-Aug-2017**

**[Total: --]**

1. Master Creation Table:

* Product Tests: Provision to add Zero in Selling and Cost Price.
* Parameters: Provision for adding special character like alpha, beta, gamma, Miu etc.

1. Template on all Section:

* All test parameter should be left aligned.
* Cell should be more compact.

1. For Tester:

* Only Part C will be visible to the Test in both adding and viewing of Report.

1. Test Report Template:

* Reporting date should be only Date. (All Department)
* For Environment, Only Sample Name should be available in Part A.

1. Expected Due Date Calculation:

* If all test parameter has Zero Days, then expected due date will be same as order date.

1. Order Form:

* Extra charge input type should be available for booker at the time of booking if he/she wants to add any additional charge such as convenience and sample handling Fee.

**Changes discussed on 08-Sept-2017**

1. ALTER TABLE `order\_report\_details` ADD `report\_file\_name\_without\_hf` VARCHAR(255) NULL DEFAULT NULL AFTER `created\_at`;
2. ALTER TABLE `invoice\_hdr` ADD `invoice\_file\_name\_without\_hf` VARCHAR(255) NULL DEFAULT NULL AFTER `invoice\_file\_name`;
3. ALTER TABLE `order\_master` CHANGE `is\_signed` `is\_signed` TINYINT(3) UNSIGNED NOT NULL COMMENT '0 for unsigned,1 for signed,2 for N/A';
4. ALTER TABLE `order\_master` CHANGE `is\_sealed` `is\_sealed` TINYINT(3) UNSIGNED NOT NULL COMMENT '0 for unsealed,1 for sealed,2 for Intact,3 for N/A';
5. alter table order\_master drop foreign key order\_master\_stability\_id\_foreign;
6. ALTER TABLE `order\_master` ADD `stability\_note` TEXT CHARACTER SET utf8 COLLATE utf8\_unicode\_ci NULL DEFAULT NULL AFTER `header\_note`;
7. ALTER TABLE `samples` CHANGE `sample\_date` `sample\_date` DATETIME NOT NULL;

**Changes discussed on 23-Oct-2017**

1. Customer Master Changes:

* Remove the required (\*) condition from VST-CST, TAN NO AND Bank Name.
* ALTER TABLE `customer\_master` CHANGE `bank\_name` `bank\_name` VARCHAR(255) CHARACTER SET utf8 COLLATE utf8\_unicode\_ci NULL;
* ALTER TABLE `customer\_master` CHANGE `customer\_vat\_cst` `customer\_vat\_cst` VARCHAR(255) CHARACTER SET utf8 COLLATE utf8\_unicode\_ci NULL;
* ALTER TABLE `customer\_master` CHANGE `customer\_tan\_no` `customer\_tan\_no` VARCHAR(255) CHARACTER SET utf8 COLLATE utf8\_unicode\_ci NULL;

1. Order Status Changes:

* ALTER TABLE `order\_status` ADD `order\_status\_alias` VARCHAR(255) NULL DEFAULT NULL AFTER `order\_status\_name`;
* ALTER TABLE `order\_status` ADD `role\_id` INT(11) NULL DEFAULT NULL AFTER `order\_status\_alias`;

1. Sample Table Changes:

* ALTER TABLE `samples` CHANGE `sample\_date` `sample\_date` DATETIME NOT NULL;

1. Customer Master Changes:

Migration Changes:

* Creation of New TABLE ‘customer\_priority\_types’;
* ALTER TABLE `customer\_master` ADD `customer\_priority\_id` INT(11) UNSIGNED NULL AFTER `customer\_gst\_no`;
* ALTER TABLE `customer\_master` ADD INDEX( `customer\_priority\_id`);

Files Changes:

* Addition of New Field ‘Priority’ in customer Master Table.
* Addition of New Field ‘Priority’ in adding of form.
* Addition of New Field ‘Priority’ in editing of form.
* Addition of New Field ‘Priority’ in viewing.

**Changes discussed on 28-Oct-2017**

1. Final Approval:

* Email of Report will be sent at the time of PDF Report Generation after finalization of Report by QA. When Finalizer click on Generate Report button, then there will be option to check a checkbox for sending Draft mail or Main Mail Report.
* Changes in report type popup regarding draft and main Mail. With header report will be Main Report and Without Header Report will be draft Report.

1. Dispatcher:

* Invoice will be sent by approval of dispatcher.
* Provision for entering AR No and dispatch Date in a popup window.

1. D