

PO.03 – EMOS Purchase Order Creation in PDS project

During project delivery of a PDS project, the Project Manager may identify the requirement for works to be delivered by the EMOS PSS, outside the PSS contractual support obligations. To proceed with these works, a purchase order needs to be created by DEWPO to the EMOS PSS. The PDS is responsible for coordinating the approval for the EMOS quote, and any project variation documentation required as a result of the EMOS engagement.

Types of works identified typically require a fast response, and a sound knowledge of the site, lending EMOS PSS being best suited to deliver. Types of works may include, but not limited to:

- preliminary site inspections,
- guarding services,
- HV / electrical isolations,
- small works prior to appointment of head contractor, required to enable project scope to be delivered in the delivery phase.

The activity of engaging EMOS to deliver works in a PDS delivered project can occur during any phase after the project has been approved for delivery. Most often, the requirement to engage EMOS would be identified during the Scope and Feasibility, Design or Delivery phases of the project.

Relevant GEMS phase: Scope & Feasibility, Design, Delivery

PO.03 PDS to identify requirement for works to be delivered by EMOS PSS.

The PDS identifies that a scope of works is required to support project delivery.

PO.03.01 PDS to define scope and length of engagement

The PDS provides a scope description and / or time duration of engagement, to the EMOS PSS via email, to prompt a quotation.

PO.03.02 EMOS to submit quote

The EMOS PSS provides a quotation (on letterhead with description of work and cost breakdown) to PDS.

PO.03.03 PDS to evaluate submission type

The PDS evaluates the quote in conjunction with the project budget and schedule, to determine whether a budget / schedule variation is also required with submission.

The PDS notes whether the submission to raise a new Purchase Order for EMOS PSS, can be issued with the next phase report, or whether the request needs to be issued independent to a phase report.

This analysis informs the GEMS Task to use for the Workflow, and the appropriate approval route for the Workflow approval submission.

Below describes the scenario of the submission, the Workflow Type to use in GEMS, and instruction for submission:

Scenario A:

No budget variation, new purchase order (EMOS), with phase report.

1. Use Task Workflow and approval route relevant to phase submission, i.e M04 Approve Phase 1 Report, M12 Approve Phase 2 Report, M17 Approve TEBR.
2. **Workflow Note:** Add note on Task level for Workflow submission, to identify there is a request for EMOS PSS PO to be raised. Note to read, or similar, “New purchase order for EMOS PSS required”. This description note will allow DEWPO Delivery to identify EMOS engagement, and process request accordingly.
3. **Workflow attachments:** Quotation from EMOS to be attached to Workflow. Requestion Variation Template is not required for submission in this scenario.
4. **Workflow processing:** As DEWPO Delivery is last approver on Phase submissions, DEWPO Delivery will start new workflow to **DEWPO Procurement** to raise new purchase order for EMOS. Purchase Order has not been raised until second workflow initiated by DEWPO Delivery is approved.

Scenario B:

No budget variation, new purchase order (EMOS), separate to phase report.

1. Use Task Workflow and approval route for a RPPV.
2. **Workflow note:** Note written on Task level for Workflow submission, to identify there is a request for EMOS PSS PO to be raised. Note to read, (or similar), “New purchase order for EMOS PSS required”. This description note will allow DEWPO Delivery to identify EMOS engagement, and process request accordingly.
3. **Workflow attachments:** Quotation from EMOS to be attached to Workflow. Requestion Variation Template is not required for submission in this scenario.
4. **Workflow processing:** As this scenario uses an RPPV, the workflow will go to all parties required to perform an action, DEWPO Procurement as the last approver. When the RPPV workflow has an approved status, the EMOS purchase order has been raised.

Scenario C:

Budget / schedule variation new purchase order (EMOS), with phase report.

1. Use Task Workflow and approval route relevant to phase submission, i.e M04 Approve Phase 1 Report, M12 Approve Phase 2 Report, M17 Approve TEBR.
2. **Workflow note:** Add note on Task level for Workflow submission, to identify there is a request for EMOS PSS PO to be raised. Note to read, or similar, “New purchase order for EMOS PSS required”. This description note will

allow DEWPO Delivery to identify EMOS engagement, and process request accordingly.

3. **Workflow attachments:** Completed Request Variation Template and Quotation from EMOS to be attached to Workflow.
4. **Workflow processing:** DEWPO Delivery is last approver on Phase submissions, DEWPO Delivery will start new workflow to **NPS Support** (process variation) and then **DEWPO Procurement** to raise new purchase order for EMOS. Purchase Order has not been raised until second workflow initiated by DEWPO Delivery is approved.

Scenario D:

Budget / schedule variation, new purchase order (EMOS), separate to phase report.

1. Use Task Workflow and approval route for a RPPV.
2. **Workflow note:** Note written on Task level for Workflow submission, to identify there is a request for EMOS PSS PO to be raised. Note to read, (or similar), "New purchase order for EMOS PSS required". This description note will allow DEWPO Delivery to identify EMOS engagement, and process request accordingly.
5. **Workflow attachments:** Completed Request Variation Template and Quotation from EMOS to be attached to Workflow.
3. **Workflow processing:** As this scenario uses an RPPV, the workflow will go to all parties required to perform an action, DEWPO Procurement as the last approver. When the RPPV workflow has an approved status, the EMOS purchase order has been raised.

Scenario E:

Schedule variation only, new purchase order (EMOS), with phase report.

1. Use scenario C Workflow and instruction.
2. **Workflow processing:** DEWPO Delivery is last approver on Phase submissions, DEWPO Delivery will start new workflow to **NPS Support** (process variation) and then **DEWPO Procurement** to raise new purchase order for EMOS. Purchase Order has not been raised until second workflow initiated by DEWPO Delivery is approved.

Scenario F:

Schedule variation only, new purchase order (EMOS), separate to phase report.

1. Use scenario D workflow and instruction.
2. **Workflow processing:** As this scenario uses an RPPV, the workflow will go to all parties required to perform an action, with DEWPO Procurement as

the last approver. An approval status signified DEWPO Procurement has completed raising the EMOS PO.

PO.03.04

PDS set-up and start Workflow

PDS completes required documentation, as per PO.03.04 instruction, and completes set-up of Task and Workflow in GEMS. Refer to Workflow Approvers Template on Gateway for Workflow approval route.

<http://drnet/eig/Services/GEMS/GEMS-Training-and-Resources/Pages/Resources-DEWPO.aspx>

PDS starts Workflow to submit the request for EMOS Purchase Order with Project Variation / Phase report.

PO.03.05

NPS RPM to review Workflow submission

NPS RPM reviews the workflow submission, including the attach documentation for compliance.

PO.03.06

DEWPO Delivery to review Workflow submission, for business endorsement

DEWPO Delivery reviews the workflow documentation, as per submission type. If the submission is embedded with a phase report, the phase report will be reviewed as per business as usual.

DEWPO Delivery approves the Workflow as acceptance of the phase report / request EMOS PO, and accompanying project variation.

Depending on the workflow submission type and Variation requirement, DEWPO Delivery performs the following:

If RPPV workflow submission type (and approved), the workflow will continue to NPS Support to process variation (if variation required), and then DEWPO Procurement to raise the EMOS purchase order.

If Phase Report submission type (M04, M06, M12, M17) and no RPV Template included, DEWPO Delivery to use PO.03.07.

If Phase Report submission type (M04, M06, M12, M17) and a RPV Template is included, DEWPO Delivery to use PO.03.08.

PO.03.07

DEWPO Delivery to start Workflow (no variation)

DEWPO Delivery starts a new workflow to DEWPO Procurement, to raise EMOS purchase orders.

PO.03.08

DEWPO Delivery to start Workflow (variation)

DEWPO Delivery starts a new workflow NPS Support to apply approved variation, and then to DEWPO Procurement, to raise EMOS purchase orders.

PO.03.09

NPS Support to process variation (if project variation required)

NPS Support reviews the Request Project Variation Template for compliance and processes the variation (budget and / or schedule) in GEMS.

If no project variation required, NPS Support to approve for Workflow to continue to DEWPO Procurement.

PO.01

DEWPO Procurement to raise new EMOS Purchase Order

DEWPO Procurement to review the Workflow submission and accompanying EMOS Quotation. DEWPO Procurement to request purchase order creation (off-system), as per below.

1. DEWPO Procurement (to create the AE643 form for delegate approval)
2. The relevant DEWPO delegate to sign the AE643 form
3. DEWPO Procurement (to confirm the AE643 has been sent to CAPC for processing)
4. DEWPO Procurement (to confirm the purchase order has been created, which also completes the workflow)

Process PO.01: Create Purchase Order Process is followed to create a purchase order for the EMOS purchase order.