



BSBPMG427

Apply project procurement procedures

Assessment 4 of 5

Project



Assessment Instructions

Task overview

This assessment is divided into two [2] tasks. Read each question carefully before typing your response in the space provided.

Additional resources and supporting documents

To complete this assessment, you will need:

- Learning Material



Assessment Information

Submission

You are entitled to three [3] attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment [e.g. allowing additional time]
- the evidence gathering techniques [e.g. oral rather than written questioning, use of a scribe, modifications to equipment]

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Please consider the environment before printing this assessment.

Task 1

Case Study

This is a continuation of assessments 2 and 3 – Project.

For the purpose of this assessment, you will play the role of Trish Gibbons, Accounts Officer and Project Officer for CBSA.

You received the following email from Wi Zhang, the Chief Financial Officer for CBSA:

Good morning Trish,

I wish to congratulate you on your excellent work to date. You have understood the objectives of the projects and successfully met with the suppliers to determine the agreed terms and conditions for both projects. I am extremely happy with the Terms and Conditions contract you produced for the two projects.

I would like you to document and undertake the procurement activities using the attached procurement activity register to accept supplies and confirm that they are fit for purpose in both quality and suitability for both projects.

The purpose of this register is to outline the following:

- how and when goods or services are received
- how the goods and services are reconciled with relevant documents such as delivery slips and quality inspection reports
- the person/s responsible.

I would like you to complete the registration for the Customer Service Software we are about to receive from the “We serve you software” supplier.

Before you accept and register the software, I would like you to organise the IT team to test it and confirm that it is fit for purpose both in quality and suitability. Their deadline to complete this task is 2 days.

Once you receive confirmation from the IT team, you can proceed with registering the software using the Procurement Activities Register as per our policies and procedures.

And finally, you will be the person responsible for checking the invoice and send it for processing.

Feel free to add any other details in the template to ensure the supplies are provided in accordance with the terms and conditions.

Please have the templates for both projects ready for our weekly project meeting next Thursday.

Kind Regards,

Wi Zhang

Chief Finance Officer

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222


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- a) You will need to send an email to the IT team requesting them to test the Customer Service Software sent. In your email, you will need to:
- Greet the team
 - Explain the purpose of your email. Inform them that the new software has arrived and needs to be tested before we accept it.
 - Inform them of their deadline


Assessor instructions: The student must send an email using the template below. In their email, they will need to explain the purpose of their email and inform the IT team about their deadline.

Students' words will vary, but their responses will need to reflect the content in the sample answer provided below.

To:	<i>IT Team</i>
From:	<i>Trish Gibbons [trish.gibbons@cbsa.com.au]</i>
Date/time:	<i>Tuesday, 9:00 a.m.</i>
Subject:	<i>Testing new Customer Service Software</i>
Attachments:	<<Add the name of any attachments here [leave blank if none]>>
<p><i>To IT Team,</i></p> <p><i>I am so pleased to inform you that the new Customer Service Software has arrived.</i></p> <p><i>I would like to organise a day for the IT team to test the new software and confirm that it is fit for purpose both in quality and suitability.</i></p> <p><i>This task will need to be completed within 2 days in order to finalise the agreement with the supplier.</i></p> <p><i>I am looking forward to hearing back from you.</i></p> <p><i>Kind regards</i> <i>Trish Gibbons</i></p>	
<p><i>Accounts Officer/Project Officer</i> 300 Fictional Way, Sydney, NSW 2000 Phone: 1800 111 222 www.cbsa.com.au</p>	

- b) The IT team sent you confirmation of the suitability of the software, and they mentioned that the product quality is exceptional.
You will now need to register the software using the Procurement Activities register below.

To do so, you will need to review the Delivery Slip attached to confirm that financial accounts match the purchased item and that the installation price, as well as the yearly subscription, is correct.

Delivery Slip			
 We serve you software 12 Jones Street Capital City 9999 web: wsy.com.au Ph: 888 777 333 email: orders@wsy.com.au		DELIVERY SLIP Date: 1 August Customer ID: 12345	
BILL TO		DELIVERY TO	
Wi Zhang Chief Finance Officer 300 Fictional Way, Sydney, NSW 2000 Phone: 1800 111 222		Trish Gibbons Chief Finance Officer 300 Fictional Way, Sydney, NSW 2000 Phone: 1800 111 222	
ORDER DATE	ORDER NO	PURCHASE ORDER NO	CUSTOMER CONTACT
14 July	123477	889955	Trish Gibbons
ITEM NO	DESCRIPTION	ORDER QUANTITY	SHIP QUANTITY
HP3388	Customer Service Software	1	1
Installation Price	\$235,000		
Yearly subscription	\$5,000		

Assessor instructions: The student must fill out the Procurement Activity Register below.

The correct answer is provided below.

PROCUREMENT ACTIVITY REGISTER						
PROJECT NAME: CUSTOMER SERVICE SOFTWARE						
Supplier	Product Quality	Quantity	Delivery	Price (Installation Price)	Peron/Team and date received and checked	Invoice checked and sent for processing
<i>"We serve you"</i>	<i>Exceptional</i>	<i>1</i>	<i>DD.MM.YY</i>	<i>\$235,000</i>	<i>IT Manager 18 July</i>	<i>Trish Gibbons 18 July</i>

software						
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Task 2

Case study

Wi sent you the following email:

Good morning Trish,
 I would like you to monitor and control suppliers using the attached Procurement Monitoring Template. Using the attached templates will ensure that we meet our reporting and audit requirements.
 Please have the templates for both projects ready for our weekly project meeting next Thursday.
 Kind Regards,
 Wi Zhang

Chief Finance Officer
 300 Fictional Way, Sydney, NSW 2000
 Phone: 1800 111 222
www.cbsa.com.au



Using the details from project briefs in the previous task and the various details from the previous assessments, you are required to monitor and control suppliers for both CBSA projects using the attached **Procurement Monitoring Template**. The template will assist in determining if any procurement tasks are outstanding, issues and the current status. The template is designed to monitor and control suppliers and contractual supply documentation and assist in finalising procurement activities.

Project 1: Brief

Based on the feedback from the IT Manager, the customer service software was excellent. It was fit for purpose in terms of quality and suitability, and the installation process was smooth.

The Finance Manager has entered the IT Supplier contract and details into the finance system.

All system checks have been completed, and the first instalment has been approved to be paid.

Project 2: Brief

Based on the Operation Manager's feedback, Real Estate Agent has not been able to source suitable office space with the 15 car parking spots requested by the due date. Parking is dependent on the lease of the office, and all 15 parking spots were meant to be included in the rent at \$650.00 per week.

If the Real Estate Agent cannot source a suitable office with the car parking requirement, the Terms and conditions of the contract will need to change, or CBSA will need to find a different Real Estate Agency.

Assessor instructions: The student must demonstrate that they can complete the Procurement Activities Plan template by using the various details from the terms and conditions/goods and services contract.

The student must be able to document the various procurement activities to monitor and control suppliers and contractual supply documentation and assist in finalising procurement activities.

Project 1: Brief

The student must be able to demonstrate that they can respond to the task instructions and use the feedback from the IT Manager that the customer service software was excellent. It was fit for purpose in terms of quality and suitability, and the installation process was smooth.

The Finance manager has entered the IT Supplier contract and details into the finance system.

All system checks have been completed, and the first instalment has been approved to be paid.

Project 2: Brief

The student must demonstrate that they can respond to the task instructions and use the Operation Manager’s feedback that the Real Estate Agent has not been able to source suitable office space with the 15 car parking spots requested by the due date. Parking is dependent on the lease of the office, and all 15 parking spots were meant to be included in the rent at \$650.00 per week.

If the Real Estate Agent cannot source a suitable office with the car parking requirement, the Terms and conditions of the contract will need to change, or CBSA will need to find a different Real Estate Agency.

The student must then complete the Procurement Monitoring Template using all the information provided in the brief.

Students are required to complete the roles and responsibilities matrix using the template provided. Students’ words will vary, but their responses need to match the exemplar answer below.

▪ **Procurement Monitoring Template 1**

Project 1 Title	Customer Service Management Software					
Project Manager	Wi Zhang – Chief Financial Officer			Date and Project period	DD/MM/YY	
Status Indicator	GREEN On Schedule		YELLOW Areas of concern	RED Areas of major concern	BLUE Not started	
Work Task and responsible person	Overall Performance to Plan Colour code below as required	Details of progress, achievements and any issues	Work task Risks Colour code below as required	Issue Resolution Colour code below as required	Dependencies Colour code below as required	Action Completed/Pending

Shortlisting of suppliers Project manager IT manager	GREEN	GREEN	GREEN	N/A	N/A	Completed
Terms and conditions agreed. IT manager	GREEN	GREEN	GREEN	N/A	N/A	Completed
IT consultants for installation employed. IT manager	GREEN	GREEN	GREEN	N/A	N/A	Completed
IT Supplier contract and details entered into the finance system Finance manager	GREEN	GREEN	GREEN	N/A	N/A	Completed
System checks IT manager	GREEN	GREEN	GREEN	N/A	N/A	Completed
Project Officer Checking installation invoice against project schedule for processing \$50,000 first instalment	GREEN	GREEN	GREEN	N/A	N/A	Completed

▪ **Procurement Monitoring Template 2**

Project 2 Title	Additional Office Melbourne					
Project Manager	Wi Zhang – Chief Financial Officer			Date and Project period	DD/MM/YY	
Status Indicator	GREEN On Schedule		YELLOW Areas of concern	RED Areas of major concern	BLUE Not started	
Work Task and responsible person	Overall Performance to Plan Colour code below as required	Details of progress, achievements and any issues	Work task Risks Colour code below as required	Issue Resolution Colour code below as required	Dependencies Colour code below as required	Action Completed/Pending

Shortlisting of real estate agents Project manager	GREEN	GREEN	GREEN	GREEN		Completed
Check office for car parking needs.	Yellow	Yellow the Real Estate Agent has not been able to source suitable office space with the 15 car parking spots requested by the due date.	Yellow	Yellow	Parking is dependent on the lease of the office, and all 15 parking spots were meant to be included in the rent at \$650.00 per week.	Pending
Terms and conditions agreed. Project manager Lawyer	GREEN	GREEN	Yellow We cannot agree on terms and conditions unless suitable office space is sourced, including the agreed parking space spots.	Yellow The agent will need to find a suitable place with the requested parking spot, or the Terms and conditions of the agreement will need to change, or we will need to find a different Real Estate Agency.		Pending

Assessment checklist:

Students must have completed two [2] tasks within this assessment before submitting. This includes:

1	Task 1: - Role Play - Procurement Activities Register Templates [2]	<input type="checkbox"/> <input type="checkbox"/>
2	Task 2: Procurement Monitoring Templates [2]	<input type="checkbox"/>



Congratulations, you have reached the end of Assessment 4!

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