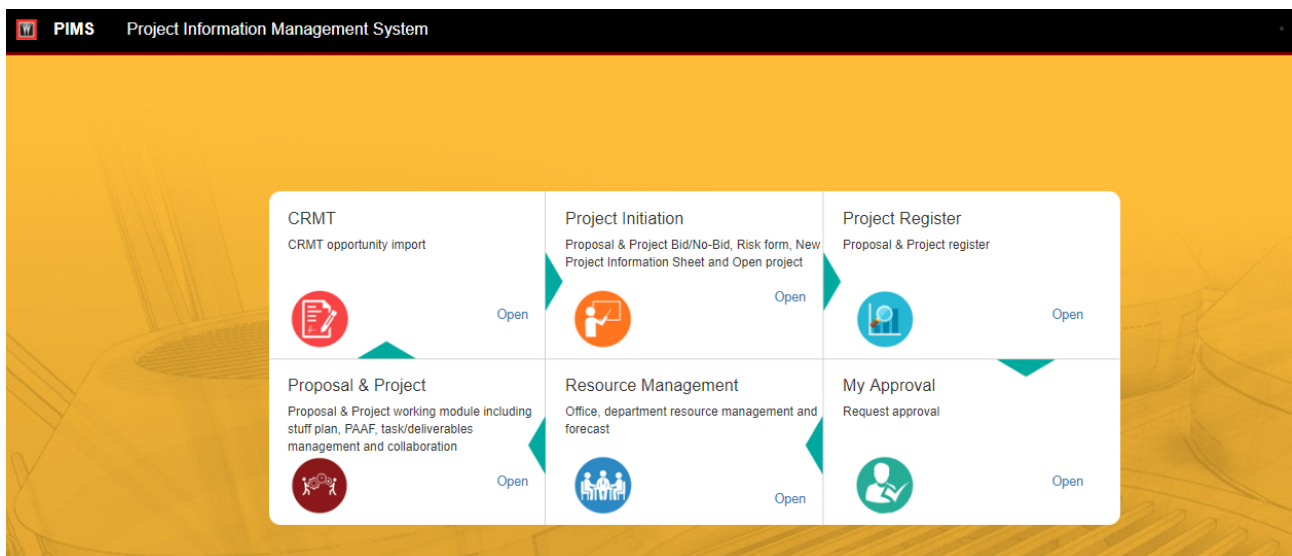




# WorleyParsons

resources & energy

## PIMs 用户手册



25-Jun-18



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## 1 系统登陆

登陆地址：

<https://cnbeieinc2.worleyparsons.com/pims/Default.aspx>

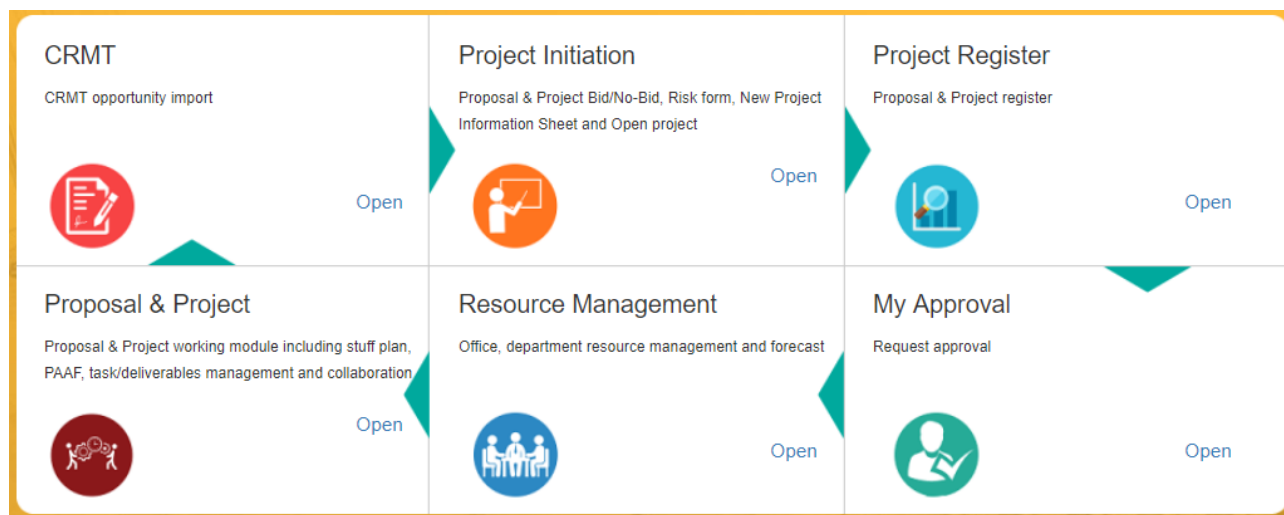
或者通过公司电话簿/工时系统主页面快捷链接登陆。

该系统支持智能手机应用。

登陆账号：

所有沃利帕森（中国）员工在公司网络环境内均可直接登陆 PIMs 系统，在外网登陆时需要输入员工的公司域账号和密码。

系统登陆成功后，系统界面如下：



用户根据各自权限选择对应的 Open 按钮进入需要系统，各个系统功能及权限说明如下：

- CRMT – 专人负责将每周从 CRMT 数据库导出的报告数据导入 PIMs 系统，供后续 Proposal/Project 初始化，需要专门角色，目前程玲(Belinda Cheng)负责 CRMT 数据导入，具体使用参考第二章。
- Project Initiation – 根据 CRMT 中有效机会启动报价或项目申请流程，包括 Risk, BNB, PIMS 和开报价/项目号, 该模块需要单独角色 (Project Initiation) 才能登陆，沃利帕森员工需要先申请权限才能登陆该模块，启动申请流程，具体使用参考第三章。
- Project Register – 辅助公司项目管理团队进行项目关键信息管理，需要专门角色。
- Proposal & Project – 报价或在执行项目人力计划、PAAF、任务管理及在线工作平台，目前还处于开发阶段，未投入使用。
- Resource Management – 公司人力资源管理和预测，目前还处于开发阶段，未投入使用。
- My Approval – 在线批复各类申请，包括 Risk, BNB, PIMS 等，不需要单独角色，所有用户都能登陆该模块批复属于自己的申请，具体使用参考第四章。



## 2 CRMT

工作页面

WorleyParsons

PIMs My Approval CRMT Loader Project Initiation Project Register

Fuju Zhao

PIMs > Project Initiation > CRMT Loader

CRMT Loader

Import data

ID	CRMT Load File	Template	Loaded By	Created Date
4	crmt-201.xlsx	CRMT	xxxxxx	2018/05/16
3	CRMT.xlsx	CRMT	xxxxxx	2018/04/27
2	CRMT.xlsx	CRMT	xxxxxx	2018/04/27
1	CRMT-1.xlsx	CRMT	xxxxxx	2018/04/18

Total: 4 row(s), 1 page(s). Current pageindex is 1. Goto page

首页

上一页

1

下一页

尾页

Details

Row Status	Project ID	Business Unit	Business Line	Opportunity Lead Sector	Project Name	Customer	Prospect Status	Bid Due Date	Award Date	Go (%)	Get (%)	Wt CV
Append	136610	[OBOR] [NBAU] [Must Win]	Services	Infrastructure	KUDU 800MW Electric Power Plant	Shanghai Electric Power Generation Group (SEC)				80	100	12

CRMT 历史导入记录

历史 CRMT 导入机会清单

CRMT 数据导入:

点击上图中 **Import Data** 按钮, 弹出下列菜单, 点击选择文件选择待导入 CRMT 文件, 成功后, 选择 **Read** 浏览本次导入 CRMT 数据, 然后在 **Update** 列选择需要导入的具体 CRMT 行, 最终点击 **Import** 导入数据。

由于从 CRMT 数据库导出的报告存在一些隐含数据, 用户导入前需要根据 **Help** 的指导进行简单处理。

WorleyParsons

PIMs My Approval CRMT Loader Project Initiation Project Register

Fuju Zhao

Project Initiation > CRMT Loader > Import data

Import data

Select CRMT File [Download template](#) [Help](#)

选择文件 | 未选择任何文件

Read

Search

#	Row Status	Project ID	Business Unit	Opportunity Lead Sector	Business Line	Project Name	Customer	Prospect Status	Bid Due Date	Award Date	G (%)
1	Append	1802598	[GSM - Must Win]	Chemicals	Major Projects	China ADN Project - EPCM	Invista	Identified	2020/09/30	2020/11/02	5
2	Append	1703661	[GSM - Must Win]	Chemicals	Services	Chevron Oronite CMP Project EPC	Chevron	Submitted	2018/01/05	2018/06/18	1
3	Append	1803243		Chemicals	Services	BASF Finland pCAM Project DED+EPsCm	BASF	Determined	2018/11/26	2018/12/24	9
4	Append	1802400	[GSM - Must Win]	Chemicals	Major Projects	China ADN Project - FEL3	Invista	Identified	2019/09/30	2019/11/01	5
5	Append	1500495		Chemicals	Services	BASF Malaysia	BASF	On Hold	2016/01/15	2018/05/31	5

Import

Page 4 of 18



## 3 Project Initiation

### 3.1 主工作页面

在主工作页面内有两个子页面 **My Project** 和 **All Project**，对于普通用户只能看到属于自己的 **CRMT** 项目信息，只有管理员和 **BD** 部门人员才能看到所有 **CRMT** 的项目信息。

PIMS > Project Initiation

Project Initiation

Type CRMT ID  Search

**Create Project**

Action(s)	CRMT ID	Business Unit	Business Line	Opportunity Lead Sector	Project Name	Customer	Prospect Status	Status	Status Date
<a href="#">Edit owner</a>	1802272	OBOR	Services	Hydrocarbons	CMEC Angola Refinery Pursuit Consultancy	CMEC (China Machinery Engineering Corporation)	Identified	Project initiation	
<a href="#">Edit owner</a>	1802271		Services	Hydrocarbons	CNOOC Power & Gas Group Standard Project Management Practice Development Consultancy	CNOOC Gas and Power	Identified	Project initiation	
<a href="#">Edit owner</a>	1703830	[OBOR] [GSM - Must Win]	Major Projects	Hydrocarbons	East Africa Crude Oil Pipeline	Total E&P Uganda B.V	Identified	Proposal in Executing	

### 3.2 发起报价/项目申请

当用户发起报价/项目申请时，首先输入 **CRMT** 号进行搜索（该 **CRMT** 号可以从 **CSG** 报价经理或 **BD** 人员处获取），系统会弹出搜索结果。

用户选择 **Process Current CRMT**，则该 **CRMT** 项目就会归属于当前用户，并显示在当前用户的 **My Project** 清单中。当前用户可以选择高亮的 **Project Name** 列进入该项目建立报价/项目申请。

Search CRMT ID

**My Project** **All Project**

Search

Result:

Owner(s)	CRMT ID	Business Unit	Business Line	Opportunity Lead Sector	Project Name	Customer	Prospect Status	Status	Status Date
	1802269	OBOR	Services	Hydrocarbons	CPP Bangladesh LNG Terminal Project Design Review	China Petroleum Pipeline Bureau (CPP)	Identified		

**Process Current CRMT**

用户选择 **Process Current CRMT**，则该 **CRMT** 项目就会归属于当前用户，并显示在当前用户的 **My Project** 清单中。

当用户需要开内部项目（不需要 **CRMT** 号）时，用户可以通过择 **Create Project** 直接建立项目，系统弹出下列界面：



## Create Project

Project Name

Client + Project Title + Phase and/or Service

Create

用户输入相应项目信息，选择 **Create** 即可直接创建项目（不能直接建立报价，任何报价必须通过 **CRMT**）

通过 **CRMT** 或直接建立的项目都会在主页面的 **My Project** 下列出，用户可以选择高亮的 **Project Name** 内容进入该项目建立报价/项目申请。



PIMs > Project Initiation

### Project Initiation

Type CRMT ID

Search

My Project	All Project									Create Project
Action(s)	CRMT ID	Business Unit	Business Line	Opportunity Lead Sector	Project Name	Customer	Prospect Status	Status	Status Date	
<a href="#">Edit owner</a>	1802272	OBOR	Services	Hydrocarbons	CMEC Angola Refinery Pursuit Consultancy	CMEC (China Machinery Engineering Corporation)	Identified	Project Initiation		
<a href="#">Edit owner</a>	1802271		Services	Hydrocarbons	CNOOC Power & Gas Group Standard Project Management Practice Development Consultancy	CNOOC Gas and Power	Identified	Project Initiation		
<a href="#">Edit owner</a>	1708488	OBOR	Services	Hydrocarbons	CPECC AGPP Project Technical service	China Petroleum Engineering & Construction Corporation (CPECC)	Identified	Proposal initiation		

每个 **CRMT** 项目都有自己的状态，具体说明如下：

空 – 表示用户发起了一个报价/项目申请，但还没有进行 **Risk**, **BNB** 和 **NPIS** 的批准流程；

**Proposal Initiation** – 表示用户建立了一个 **Proposal**，并发起了 **Risk**, **BNB** 和 **NPIS** 的批准流程；

**Project Initiation** – 表示用户建立了一个 **Project**，并发起了 **Risk** 和 **NPIS** 的批准流程；

**Proposal in Execution** – 表示已经完成 **Proposal** 号开通，正在执行报价；

**Project in Execution** – 表示已经完成 **Project** 号开通，正在执行项目。

用户选择 **New Proposal** 或 **New Project** 建立新报价/项目申请，同一个 **CRMT** 机会可以建立多个报价/项目。



PIMs > Project Initiation > Proposal

Sub ID	Proposal No	Originator	Created Date	Status	Forms	Action(s)	BID/NO BID Submit Date	BID/NO BID Approve Date	Risk Submit Date
1		0	2018/06/25	New	<a href="#">BID/NO BID</a> <a href="#">Risk</a> <a href="#">NPIS</a> <a href="#">Open Proposal</a> <a href="#">Delete</a>				

CRMT ID	<input type="text" value="1708488"/>	Business Unit	<input type="text" value="OBOR"/>
Business Line	<input type="text" value="Services"/>	Opportunity Lead Sector	<input type="text" value="Hydrocarbons"/>
Project Name	<input type="text" value="CPECC AGPP Project Technical service"/>		
Customer	<input type="text" value="China Petroleum Engineering &amp; Construction Corporation (CPECC)"/>	Prospect Status	<input type="text" value="New"/>



### 3.3 Risk批准流程

在 Project Initiation 主页面，用户选择 Risk 按钮启动 Risk 批准流程，Risk 主要用于完成风险工作单信息在线填写、提交和维护，工作界面如下：（所有带\*标识的为必填项）

PIMS > Project Initiation > Proposal > RISK FORM

**RISK FORM**  
CRF-0008 WORLEYPARSONS Rev 40

**Project/Proposal Detail**

Project/Proposal Name: CMEC Angola Refinery Pursuit Consultancy

Project/Proposal Description: Test

Project/Proposal Number: Revision: 0

Project/Proposal Stage: ☒ Proposal ☐ Project Award ☐ Start of new phase/significant project change

Business Line/s involved in the project: ☒ Services ☐ Major Projects ☐ Improve ☐ Advisian

**必填内容**

批准人部分（见下图）：

**Endorsement and Sign-Off**

Overall Risk Classification: **Moderate**

**PROPOSAL STAGE:** Frank Zhao Fujun

Verified as complete & correct by the Proposal Manager

Name	Title	Signature	Date

**PROJECT AWARD, NEW PHASE, or SIGNIFICANT CHANGE:**

Verified as complete & correct by the Project Manager/Project Director

Name	Title	Signature	Date

**ALL Risk Classification Forms:**

Reviewed & Endorsed by: Location Manager

/As per the Location Delegation of Authority (as detailed in the Location Business Plan) or

Advisian Location Manager/Country Manager Name

or Improve Relationship Manager or Manager of Major Projects

Name	Title	Signature	Date
Ma Zhengren			

**ALL High Risk Classifications:**

Reviewed & Endorsed as appropriate for the business line - Location Director/ Regional

Advisian Director/Improve Director/ Manager of Major Projects

Name	Title	Signature	Date
Tom Liao Shenli			

Overall Risk Classification – 系统根据下文风险等级自动计算；

Proposal Manager – 报价必填项，输入人名或员工号系统自动列出可选用户；

Project Manager – 项目必填项，输入人名或员工号系统自动列出可选用户；

All Risk Classification – 必填项，默认且只能选 Ma Zhengren 进行批准；

All High Risk Classification – 当总体风险等级为高时，为必填项，选择 CSG 负责人进行批准。



风险等级部分：

1.Risk Classification & Required Actions					
Area	Scenario	Required Actions	Risk Rating	Follow-Up Tracking	
				Item Completed?	Completed by & Date
Health, Safety & Environment (HSE) <a href="#">Select Scenario</a>	No site or field based activity, or company personnel on site except for visits or observations. OR We are using WorleyParsons systems and processes and carrying out activities in WorleyParsons owned construction facilities (i.e. Rosenberg & Cord).	1. CONSULT with Location Assurance Business Partner or Business Line Equivalent to determine if a Project HSE Management plan is required. NOTE: The office HSE plans and Location R3 Plan apply to the work.	Low		
Media or Public Interest <a href="#">Select Scenario</a>	No potential media or public interest in Project or Customer	No further action necessary.	Low		

所有项为必填项，用户点击 **Select Scenario**，系统弹出下列菜单，用户选择蓝色高亮文字，系统自动填充 Scenario，Required Action 和 Risk Rating 内容。

Media or Public Interest

Scenario	Required Actions	Risk Rating
No potential media or public interest in Project or Customer	No further action necessary.	Low
Customer or Project has the potential to attract adverse media or public attention.	1. NOTIFY Global Director Investor Relations	Moderate
Customer or Project has or is highly likely to attract adverse media or public attention.	1. APPORVAL from Global Director Investor Relations before proceeding with bid	High

Close

如果需要后续任务跟踪，用户在 Item Completed 和 Completed By & Date 列手工输入任务和完成日期。

所有内容完成后点击 **Save Change** 来保存，点击 **Ready For Approval** 来提交批准，系统会以此给 Proposal 或 Project Manager, All Risk Classification 和 High Risk Classification 的对应批准人发邮件。

邮件提示内容如下图，批准人可以直接点击 **Here** 链接来打开 **My Approval** 进行批复。



\_zhenhua.liu@worleyparsons.com

✓ Zhao, Fujun (Beijing)

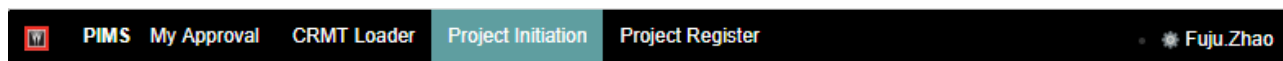
**Approval/Submission Reminder for -2 Risk**

Risk Form for project -2 is ready for approval. Please click [here](#).

This is a system generated email from PIMs Online. Please do not reply to this email.

当申请人发现某个申请停留在某人没有批准时，点击 **Expediting** 进行催交，则当前批准人会再次收到邮件提醒。

当 Risk 提交申请后，再次打开 Risk 页面时，Risk 页面内容不能修改，页面上方的命令行也变化为只有 **Expediting** (催交)。



PIMS > Project Initiation > Proposal > RISK FORM

Expediting

## RISK FORM

CRF-0008 WORLEYPARSONS Rev 40





### 3.4 BNB

在 Project Initiation 主页面，用户选择 BNB 按钮启动 BNB 批准流程，BNB 主要用于完成报价信息在线填写、提交和维护，工作界面如下：（所有带\*标识的为必填项）

PIMS

My Approval

CRMT Loader

Project Initiation

Project Register

Fuju Zhao

PIMS > Project Initiation > Proposal > BID/NO BID FORM

Save change

Ready for Approval

Expediting

BID/NO BID FORM

A replica of this form is contained in the Customer Relationship Manager Tool (CRMT). All changes to this form must be reflected on the CRMT form by contacting crmt@worleyparsons.com.

CSG

Hydrocarbons

Date (yyyy/mm/dd)

Custodian

Ling Cheng

Sub-sector/Industry

Onshore - Conventional O&G

Rev

PROJECT SUMMARY

Project Title

CPECC AGPP Project Technical service

Customer

China Petroleum Engineering & Construction C

Proposed Execution Office

Site Location/Region

Russia

Proposed Bidding Office

Project Funded?

Yes

No

Worleyparsons Scope

Study

E

P

EP

EPCM

C

CM

PMC

EPC

Phase(WPMP)

Identify

Evaluate

Define

Excute

Operate

Consulting

Deliver

Improve

Special Staffing Needs

Security Risk/R3 Issues

HVE/Workshare Opportunity

Nuclear Scope\*\*

Sanctioned Country

Government Project

KEY DATES (\* Indicates Required Field)

Qualifications Due (yyyy/mm/dd)

Bid Due Date (yyyy/mm/dd)\*

Award Date (yyyy/mm/dd)\*

RFP Release Date (yyyy/mm/dd)\*

Presentation Date (yyyy/mm/dd)

Project Duration Week\*

100

COMMERCIAL

Currency Stated In: USD

EUR

CNY

AUD

Other

(please specify)

Chinese Yuan Renminbi

Contract Type: CR – Cost Reimbursable

CPF – Cost Plus Fee

LS – Lump Sum

LSTK – Lump Sum Turn Key

Other

(please specify)

Estimated Total Installed Cost

Estimated Contract Value

232306

Home Location Manhours

4000

Estimated EBIT

23231

Potential HVE Manhours

Basis (Multiplier, etc.)

Estimated License Fee

Go Probability (%)

100

Get Probability (%)

90

Go-Get Probability (%)

PROPOSAL

Estimated Proposal Cost (CNY)

Proposal Manager

Proposed Project Manager

JV Partner(s)

Competition/Location

Review Requirements

Manager Review

OR

Red Team (Technical) and Green Team (Commercial).

Executive Proposal Review (EPR)

May be required for very large or high risk proposals

Mandatory for all Major Proposals

OR

#### Bid / No Bid 结论:

BID NO-BID DECISION (Check as appropriate)

Bid

Request proposal number and update the Customer Relationship Manager Tool (CRMT) Opportunity Manager

No Bid

Close out and update status in the Customer Relationship Manager Tool (CRMT) Opportunity Manager

Comments:

Page 9 of 18



用户可以添加附件：

**Attachments***(Check if attached and insert additional documents as applicable)*

Completed/Approved Risk Classification Form

Strategy Memo

Proposal Budget

Proposal Strategy

Preliminary Project Execution Strategy

JV Agreement/Memo of Understanding

Completed/Approved Credit Check Request Form

Other(Replace "Other" with attached document title & delete this text)

Add attachment

Attach Description	Upload By	Upload Date	Action(s)
--------------------	-----------	-------------	-----------

点击 **Add Attachment**，系统弹出下列菜单，选择文件添加文件，在 **Attach Description** 列添加文件描述，**Save** 保持即可。

Add attachment

File Name

选择文件

未选择任何文件

Attach Description

Close

Save

**BNB 批准：**

**APPROVALS***(Refer Regional / Location DoA and check required approvals)*

Approve		Endorse		Title	Name	Signature	Date
Yes	No	Yes	No				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CEO			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CSG Executive Director			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Region Managing Director			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Location Manager			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Location/Region CSG/BD Director			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manager of Projects/Proposals			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other - (Replace other with position title)			

Save change

Ready for Approval

Expediting

默认 **Location/Region CSG/BD Director** 和 **Location Manager** 为必选项，当 **DOA** 超出中国区批准上限时，选择相应 **Region Managing Director**，当超出 **APAC** 批准上限时，选择 **CEO** 批准。

**Other**, **Manager of Projects/Proposals** 和 **CSG Execution Director** 为可选项。

所有内容完成后点击 **Save Change** 来保存，点击 **Ready For Approval** 来提交批准，系统会以此给 **Proposal** 或 **Project Manager**, **All Risk Classification** 和 **High Risk Classification** 的对应批准人发邮件。

邮件提示内容如下图，批准人可以直接点击 **Here** 链接来打开 **My Approval** 进行批复。



\_zhenhua.liu@worleyparsons.com

Zhao, Fujun (Beijing)

Approval/Submission Reminder for 1802272 BID/NOBID

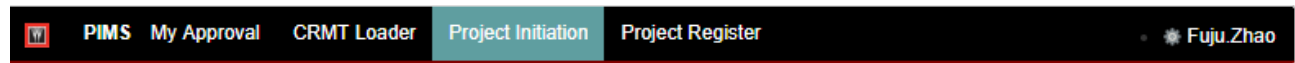
BID/NOBID Form for project 1802272 is ready for approval. Please click [here](#).

This is a system generated email from PIMs Online. Please do not reply to this email.

当申请人发现某个申请停留在某人没有批准时，点击 **Expediting** 进行催交，则当前批准人会再次收到邮件提醒。



当 BNB 提交申请后，再次打开 BNB 页面时，BNB 页面内容不能修改，页面上方的命令行也变化为只有 Expediting (催交)。



PIMS > Project Initiation > Proposal > BID/NO BID FORM

Expediting

## BID/NO BID FORM

### 3.5 NPIS

在 Project Initiation 主页面，用户选择 NPIS 按钮启动 NPIS 批准流程，NPIS 主要用于完成新项目信息单在线填写、提交和维护，工作界面如下：（所有带\*标识的为必填项）



PIMS > Project Initiation > Proposal > NPIS Form

## New Project Information Sheet (NPIS)

Save change Ready for Approval Expediting

All items marked \* are Mandatory fields. Ecosys generated NPIS form with the same revision number can also be used as an alternate.

### GENERAL INFORMATION

Project Start Date (yyyy/mm/dd)*	<input type="text"/>
Project Type *	<input type="text"/>
WP Contracting Entity or JV*	<input type="text"/>
Business Line *	Services
Advisian Service Line (Only applicable to Advisian Business Line)	<input type="text"/>
Industry Sector Number *	<input type="text"/>
Home Office Location *	Beijing
GBS Project Template *	<input type="text"/>
Project Title (e.g. Client, Project title) * 0-30 characters	CPECC AGPP Project Technical service
Proposal No (if known)	<input type="text"/>
CRMT Entry No	1708488

### CONTRACTUAL INFORMATION

Customer Type *	Internal
Internal Entity *	<input type="text"/>
Customer Name *	China Petroleum Engineering & Construction Corporation (CPECC)
Existing Customer Ref No	<input type="text"/>
Bill to address *	<input type="text"/>
Customer Contact Name	<input type="text"/>
Estimated WP Hour *	4000
Estimated WP Revenue *	232306
Contract Currency (CNY, AUD, USD) *	CNY
Proposal Budget (CNY)	<input type="text"/>
Project Classification by size Help	<input type="text"/>
Project Risk Classification *	Low
Services Type * Primary	<input type="text"/>
Secondary	<input type="text"/>
Existing WP Contract *	<input type="text"/>
Contract Number	<input type="text"/>
Purchase Order Number	<input type="text"/>
Billing Type *	<input type="text"/>
Contractual basis for commencement of billable work * Help	Option A



**GBS Key Members and NPIS Distribution (Please update the GBS key member tab if there is >1 role)**

	Key Members	Hard Copy NPIS form Distribution & GBS Notification	Name	WP Email Address
Project Manager *	<input type="checkbox"/>	<input type="checkbox"/>		
Project Accountant *	<input type="checkbox"/>	<input type="checkbox"/>		
Project Controller *	<input type="checkbox"/>	<input type="checkbox"/>		
Other	<input type="checkbox"/>	<input type="checkbox"/>		

Note: It is possible for same person to be nominated for mandatory project roles above.

**MANDATORY ATTACHMENTS TO NPIS**

Attach the following to the NPIS before sending it for approval to the Authorized Signatory:

- ☐ Completed and approved Contract Sign-Off Checklist (CSOC) where no existing contract was in place. Alternatively an executed Letter of Intent/Interim Agreement. Note that the CSOC is required for all contracts including those using standard T&Cs.
- ☐ Completed and approved Risk Classification Form (RCF).
- ☐ Customer Work Order/Purchase Order/Contract.
- ☐ If no formal proposal procedures have been followed, attach as-sold commercial basis.

Add attachment

Attach Description	Upload By	Upload Date	Action(s)
--------------------	-----------	-------------	-----------

批准人:

报价或项目经理和授权批准人为必填项，授权批准人为各 CSG 负责人，只能从下拉菜单中选择，如果没有相应批准人，请联系系统管理员。

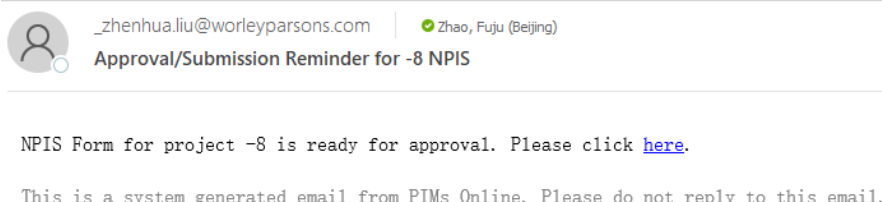
**APPROVALS**

Project Manager Name		Authorized Approval Signatory Name (As per location Delegation of Authority)	
Name:	<input type="text"/>	Name:	<input type="text"/>
Signature:	<input type="text"/>	Signature:	<input type="text"/>
Date:	<input type="text"/>	Date:	<input type="text"/>

Save changeReady for ApprovalExpediting

所有内容完成后点击 **Save Change** 来保存，点击 **Ready For Approval** 来提交批准，系统会以此给 **Proposal** 或 **Project Manager**, **All Risk Classification** 和 **High Risk Classification** 的对应批准人发邮件。

邮件提示内容如下图，批准人可以直接点击 **Here** 链接来打开 **My Approval** 进行批复。



当申请人发现某个申请停留在某人没有批准时，点击 **Expediting** 进行催交，则当前批准人会再次收到邮件提醒。

### 3.6 开报价/项目号

当前报价/项目的 **Risk**、**BNB**（只适用于报价）和 **NPIS** 都批准后，用户可以选择 **Open Proposal** 或 **Open Project** 来开报价/项目号。

**PIMs** My Approval CRMT Loader **Project Initiation** Project Register Fujun Zhao

PIMs > Project Initiation > Proposal

ProposalProject

New ProposalSave change

Status	Forms	Action(s)	BID/NO BID Submit Date	BID/NO BID Approve Date	Risk Submit Date	Risk Approve Date	NPIS Submit Date	NPIS Approve Date
Approved	<a href="#">BID/NO BID</a> <a href="#">Risk</a> <a href="#">NPIS</a> <a href="#">Open Proposal</a>	<a href="#">Delete</a>	2018/05/16	2018/05/16	2018/05/16	2018/05/16	2018/05/16	2018/05/16



开报价/项目页面如下：

用户需要完成下列 Timesheet 中需要的项目信息，其中部分信息信息从之前的 CRMT、Risk、BNB 和 NPIS 中继承过来。

**PIMs** [My Approval](#) [CRMT Loader](#) [Project Initiation](#) [Project Register](#) Fuju.Zhao

[PIMs](#) > [Project Initiation](#) > [Proposal](#) > Open Proposal

Open Proposal

TimeSheet System Required

Proposal No

Project Name

Client

Proposal Status

Project Manager (Employee No)

Entity

Type

Category

Classification



HSE Category	<input type="text" value="N/A"/>
Risk Classification	<input type="text" value="High"/>
Business Line	<input type="text" value="Service"/>
Scope	<input type="text"/>
Location	<input type="text"/>
Start Date (yyyy/mm/dd)	<input type="text"/>
End Date (yyyy/mm/dd)	<input type="text"/>
Total Manhours	<input type="text"/>

下列为报价/项目号生成规则，系统界面如下：

用户根据实际信息选择正确的报价/项目命名信息，包括, **CSG**、**Year**、**Office**、**Phase**、**Status**，**Serials Number** 由系统自动产生，在 **FY19** 财年 **Year** 默认为 **19**。

生产项目号时（不适用于报价号），有可能通过继承历史项目号加后缀来生产项目号，因此增加了 **Copy From Existing Project** 和 **Suffix**。用户在 **Copy From Existing Project** 列手工输入历史项目号，系统自动根据命名规则，提取出对应的 **CSG**、**Year**、**Office**、**Phase**、**Status** 和 **Serials Number** 信息。

当项目属于 **LYG**、**United** 或 **TJ WPC** 时，用户可以在 **Prefix** 选择相应的公司，从而实现在项目号前加前缀 **L** (**LYG**)、**U** (**United**) 或 **T** (**TJ WPC**)。



Create Project Number Required

Copy From Existing Project

Optional

Prefix

CSG

CC-Chemicals

Year

18

Office

11-Beijing Office

Phase

A-Advisory

Status

1-Project

Serials Number

Valid length: 3

Suffix

Optional

New Project No:

Open

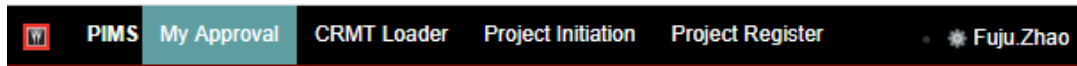
系统根据上述信息生产的报价/项目号会在New Project No处显示，用户点击Open，系统自动在Timesheet中建立项目号，并发邮件给项目管理组 (Project\_Proposalnumberactionnotice@worleyparsons.com)。

至此，报价/项目号申请流程结束，进入报价/项目实施阶段。



## 4 My Approval

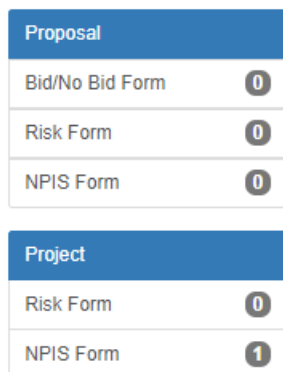
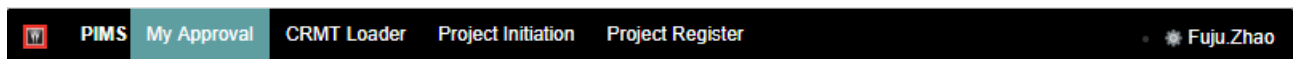
My Approval 主要用于用户在线批复各类申请，并作为集中平台记录所有批复往来信息，My Approval 应用界面如下：



PIMs > My Approval > Home



在每个批准项功能块后面都有一个黑色背景数字，表示目前待批复申请数量，例如 NPIS Form (Project)表示有一个 NPIS (Project)还没有批准。点击对应功能块进入批复页面，如下：



PIMs > My Approval > NPIS Form

### NPIS Form (Project)

CRMT ID	Project Name	Submit By	Created Date	Approved Date
-8	Inter 123 <span>Approved</span>		2018/05/29	2018/05/29
1604203	YPFB Bolivia PP project FEED (Re-bid) <span>New</span>		2018/05/23	

Total:2 row(s), 1 page(s). Current pageIndex is 1. Goto page



页面右侧列出所有已批或未批准申请项，红色状态 **Approved** 表示已批准，红色状态 **New** 表示未批准，点击高亮 **Project Name** 内容，打开申请单，界面如下：





Project Initiation > Project List > Project

Proposal	
Bid/No Bid Form	0
Risk Form	0
NPIS Form	0
Project	
Risk Form	0
NPIS Form	1

PIMS > My Approval > Risk Form (Project)

New

## New Project Information Sheet (NPIS)

All items marked \* are Mandatory fields. Ecosys generated NPIS form with the same revision number can also be used as an alternate.

### GENERAL INFORMATION

Project Start Date *	2019/9/19
(DD-MM-YYYY)	
Project Type *	Standalone
WP Contracting Entity or JV*	WPC
Business Line *	Services
Advisian Service Line	
(Only applicable to Advisian Business Line)	
Industry Sector Number *	Hydrocarbon
Home Office Location *	Shanghai
GBS Project Template *	T01 - Project Level
Project Title (e.g. Client, Project title) *	YPFB Bolivia PP project FEED (Re-bid)
0~30 characters	
Proposal No (if known)	
CRMT Entry No	1604202

GBS Key Members and NPIS Distribution (Please update the GBS key member tab if there is >1 role)

	Key Members	Hard Copy NPIS form Distribution & GBS Notification	Name	WP Email Address
Project Manager *	<input type="checkbox"/>	<input type="checkbox"/>	Liu Zhenhua	
Project Accountant *	<input type="checkbox"/>	<input type="checkbox"/>	Liu Zhenhua	
Project Controller *	<input type="checkbox"/>	<input type="checkbox"/>	Liu Zhenhua	
Other	<input type="checkbox"/>	<input type="checkbox"/>	Liu Zhenhua	

Note: It is possible for same person to be nominated for mandatory project roles above.

### MANDATORY ATTACHMENTS TO NPIS

Attach the following to the NPIS before sending it for approval to the Authorized Signatory:

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  - ☐ Completed and approved Risk Classification Form (RCF).
  - ☐ Customer Work Order/Purchase Order/Contract.
  - ☐ If no formal proposal procedures have been followed, attach as-sold commercial basis.
- Comments

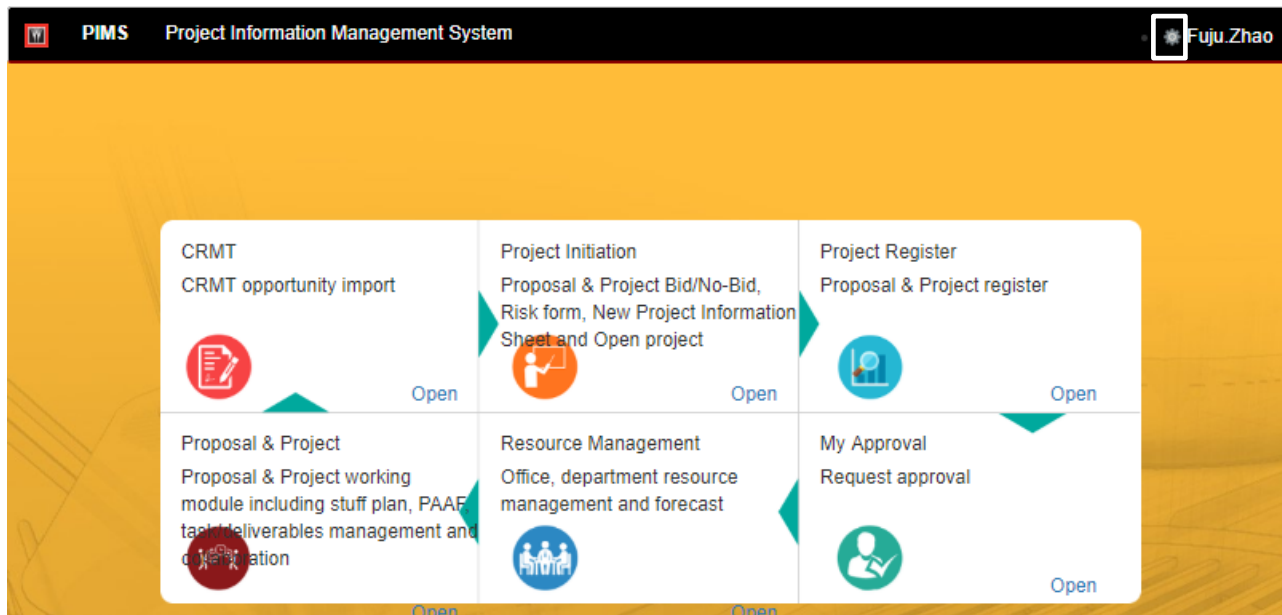
Approve Reject

批准人浏览申请后可以选择 **Approve** 批准或选择 **Reject** 来拒绝，也可以在 **Comments** 给出意见，批准后系统会自动流转到下级批准人，并发邮件提醒。

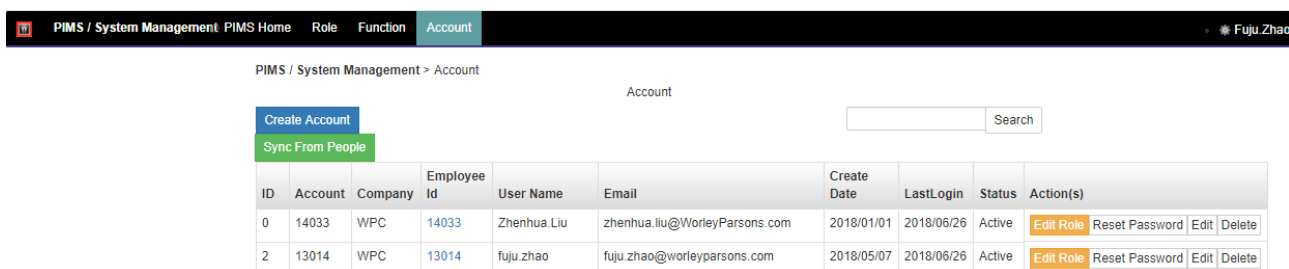


## 5 System Management

在 PIMs 主页面，用户选择右上角系统管理图标，进入系统管理界面（只有管理员有权限）



系统管理工作界面如下，管理员可以在该页面添加用户并修改权限。



系统支持:

Name	Email
Liu Zhenhua	Zhenhua.liu@worleyparsons.com
Zhao Fujz	Fujz.zhao@worleyparsons.com