BTE Project Management

beeline self-service	BTE Project Management via Self-Service allows users to administer projects and tasks visible to contractors during time and expense entry.

Please note that depending on your Beeline Platform settings, this feature may, or may not, be turned on. Reach out to your Beeline Representative to adjust settings.

How to Navigate to BTE Project Management via Self-Service:

1. Log in to the Beeline Platform using your *username* and *password*. Your Home page appears.
2. Click the **My Preferences** icon at the top right of your page in the Header Menu.
3. Hover over the **VMS Settings** menu item and click **Time & Expense.**
4. Click **BTE Project Management** from the list of available Time & Expense Self-Service features, to be taken to the **BTE Project List & Management** screen.

How to Create a BTE Project Record:

Complete steps 1-4 from the **How to Navigate to BTE Project Management** section above.

5. Follow the steps from the Navigating to BTE Project Management section above and then click the Add New link located above the search criteria fields.
6. Enter the requested information on the **Add BTE Project** Screen.
   - Standard required fields for a BTE Project record are marked with an asterisk (*) and include department, BTE Project Name, short Name, Description, Status, Project Type, Category, Offshore Project, and Request Date. **(Note:** Several data fields are pre-populated with a 0 (zero). These data fields calculate financial/budget totals based on the information entered and cannot be left blank. Adjust as needed or leave the setting at 0 (zero).
7. To create a single BTE Project record, click the OK option. If multiple BTE Project records need to be created, click the Save and Add New option; then repeat populating each Add BTE Project screen. Use the OK option for the final record to save and exit.

How to Edit a BTE Project Record:

Complete steps 1-4 from the **How to Navigate to BTE Project Management** section above.

5. Enter the required search criteria on the BTE Project List screen; then click **Search**.

6. Scroll through the displayed results to locate the BTE Project record to be updated. Click the **View Tasks link** for that line item to drill down to the BTE Project Task List screen.
7. To create a new BTE Project Task, click the **Add New** link located above the search criteria fields.
8. Enter the requested information on the Add BTE Project Task List screen.
9. To create a single BTE Project Task record, click the **OK** option. If multiple BTE Project Task record needs to be created, click the Save and Add New option; then repeat populating each Add BTE Project Task screen and use the OK option for the final record to save and exit.