

Supplier - Entering Expenses on behalf of a Contract Worker

Suppliers can have the option of entering expenses on behalf of a contract worker. The expense entry process is very similar to the steps taken by the worker with the addition of some administrative information that is not visible to a contract worker.

This article is based on standard classic Beeline Enterprise configuration. Client-specific configurations may vary slightly from what is explained here.

To enter expenses on behalf of a contract worker:

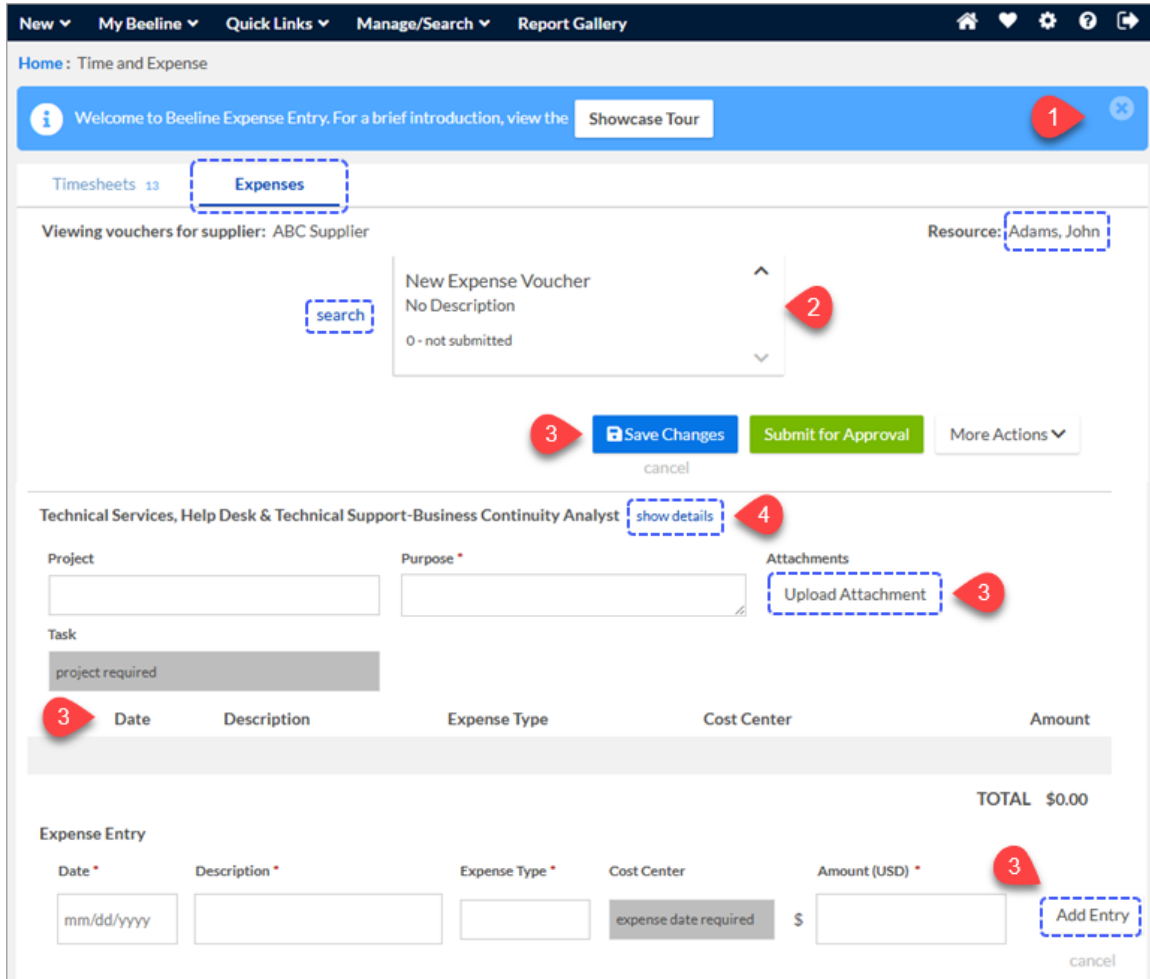
1. Log in to Beeline Enterprise using your *username* and *password*. Your Home screen appears.
2. Click the Search drop-down arrow located in the header section and select **Search Expenses** from the list.
3. In the Search box, enter all or a portion of the *Worker's Name* or *Beeline ID*. As you type, the auto suggestion/type ahead feature begins suggesting search results.
4. Click the matching record link when it displays. The screen refreshes to show the Time and Expense, Expenses view.
5. Check the name in the **Resource** field (upper right section of the screen) to confirm you have the correct contract worker's expense voucher entry record.



The Beeline Time and Expense (BTE) module is designed to manage both time and expense entry based on client preference. Some clients only permit time entry. If you are using a client account that permits BOTH time and expense entry, be sure that the correct tab (i.e., Timesheets, Expenses) is the active tab when making entries.

6. Complete the expense voucher as indicated. Features and options for filling in an expense voucher are explained in the "Expense Voucher Entry Features" section below.
7. Click **Save Changes** to store your entries if you plan to submit the expense voucher at a later time, OR, click **Submit for Approval** when the expense voucher is complete and ready to send for approval.

Expense Voucher Entry Features:



The screenshot shows the Beeline Expense Entry web application. At the top, there's a navigation bar with links like 'New', 'My Beeline', 'Quick Links', 'Manage/Search', and 'Report Gallery'. Below this, a 'Home' section indicates 'Time and Expense'. A blue banner at the top right contains a 'Showcase Tour' button (callout 1) and a close icon. The main area is titled 'Viewing vouchers for supplier: ABC Supplier' and 'Resource: Adams, John'. A 'search' button (callout 2) is next to a date picker showing 'New Expense Voucher', 'No Description', and '0 - not submitted'. Below this are buttons for 'Save Changes' (callout 3), 'Submit for Approval', and 'More Actions'. A 'show details' button (callout 4) is next to the 'Technical Services, Help Desk & Technical Support-Business Continuity Analyst' project. The 'Attachments' section has an 'Upload Attachment' button (callout 3). A table with columns 'Date', 'Description', 'Expense Type', 'Cost Center', and 'Amount' is shown, with a 'TOTAL \$0.00' at the bottom right. The 'Expense Entry' section at the bottom has fields for 'Date', 'Description', 'Expense Type', 'Cost Center', and 'Amount (USD)', with an 'Add Entry' button (callout 3) and a 'cancel' link.

1

Showcase Tour

To become familiar with standard features, start by viewing the showcase tour. Once you are familiar with these features, click the “x” to hide this section from displaying in the future.

2

Navigation

The Date Picker provides for easy navigation between expense vouchers. Use the “up” or “down” arrows to locate vouchers. For saved, submitted, or rejected vouchers, the message center under the Date Picker displays the current status of the voucher. You can also click directly on the date picker to see total amount, purpose, and statuses across several vouchers to help identify a specific voucher record.

3

Actions

Enter the expense details in the Expense Entry section of the screen. Click **Add Entry** and that line item will display in the “totals” table section above the entry section. Use the Add Entry button to add as many line items as needed.

Once you have added all the expense line items, you can edit or delete items using the “pencil” or “x” icons in the totals table.

The Upload Attachment button allows you to add receipts, or other documentation, to the expense voucher directly from your computer.

After the voucher is complete, choose to either Save Changes, Submit for Approval, or Cancel using the links provided.

When you click **Submit for Approval**. The status updates in the Date Picker section and the expense voucher forwards to the timesheet approver. Save a copy of the submitted voucher by clicking the “view printable pdf” link and then use the save feature.

4

Details

The “show details” link next to the assignment job title displays additional details related to the expense record.

Check with the client’s program office to verify documentation requirements for submitted expense vouchers.