



Manage Work Orders and Assignment Records

This job aid highlights how to manage Work Orders and Assignments. Work Orders track contractual terms and Assignment records include all non-contractual information. In general, adjustments to contractual terms (Work Order) are **amendments** while changes to non-contractual information fields (Assignment) are **edits**. Amendments require supplier acceptance and include approval workflows; edits do not.

To approve a Work Order amendment:

1. Log in to IQNavigator using your *user name* and *password* and go to your Alternate UI dashboard.
2. Click the **Amendments to Approve** link located in the Status column on the right-hand side under Work Orders/Assignments. The Work Orders – Amendments to Approve list screen displays.

The screenshot shows the IQNavigator dashboard interface. The top navigation bar includes links for My IQN, Jobs, Resources, Work Orders/Assignments, Reports, Invoicing, and Set Up. The main content area is divided into three sections: Activities, System Updates, and News and Updates. The Activities section on the left contains links for General, Logout, Jobs, View Job Opportunities, Matches, View Competition's Activity, View Supplier Organizations Job Matches, View Supplier Organizations Resource Matches, Work Orders, View Assignments, View Work Orders / Amendments, Resources, Create Resource, Reports, Custom Reports, View Report Output, User Profile, and Update Contact Information. The System Updates section in the center shows 'None available'. The News and Updates section also shows 'None available'. On the right side, the Status section displays a 'Recalculate' button and a list of metrics: Jobs (Available Jobs: 7249), Matches (Supplier Organization Resources In Draft State: 944), Work Orders/Assignments (Assignments Awaiting Start Date: 101, Current Active Contractors: 11657, Effective Assignments: 16402, Amendments To Approve: 108, Offers To Approve: 128, Targeted Offers To Approve: 119), and Reports (Expiring Reports: 0). A red arrow points to the 'Amendments To Approve' link in the Status section.

NOTE: This list is specific to YOUR user role and reflects Work Orders/Assignments for which you are the designated contact person.



- Use the Results per Page pull-down selection option on the right-hand side of the screen to adjust how many records display per screen.
- Click the Search & Filter (amendments to approve) link at the top of your screen for additional search/filter options.
- Click any column header to change the sort order of the list based on that column. Click the column header a second time to sort in reverse order
- Click the GO arrow to open the Work Order or Assignment record based on the selection made in the Work Order Actions column.

Work Orders - Amendments To Approve

Restore Default Sort Order

Export

Included in this List are Work Orders/Amendments for which you are designated as the assigned contact person. To initiate actions or to review the Work Order/Amendment details, please click on the applicable Work Order or Amendment ID Number.

Select All

Approve

	Work Order / Effective Amend. #	Amend. In Process #	Position Title	Job ID	Resource	Hiring Manager	Buyer Organization	Regular Bill Rate	Last Modified	Start Date	End Date	Work Order Status	Work Order Actions
<input type="checkbox"/>	2353702 / 12	13	Project Engineer	1508027				96.00	12/6/17 8:06 AM	1/1/12	12/31/18	Effective	<div>view assignment</div> <div></div>
<input type="checkbox"/>	3188309 / 7	8	Technical Specialist II	2078440				74.55	1/3/18 9:47 AM	12/3/12	12/31/18	Effective	<div>view assignment</div> <div></div>

3. Click the hyperlink number in the Amend. In Process # column (NOT the Work Order # hyperlink) to open the Work Order in review mode. All the contractual changes (i.e., amendments) made to the previously effective version of the assignment display in the Fields Changed box located in the upper right-hand side of the screen. Notice that all fields are <read only>.

Shell Global Solutions International (WIPSI) - RSC - KSCS (12/06/2018) - Work Order# 2353702

Position and Resource Detail

Buyer Organization Detail

Supplier Organization Detail

Work Order Summary

This Amendment and Restatement of that Work Order entered into between the Buyer Organization and the Supplier Organization referenced below constitutes the binding agreement between the parties with respect to the subject matter contained herein. This Amended and Restated Work Order is governed by the terms and conditions in the Master Agreement and Statement of Work listed in the detail sections of this Amended and Restated Work Order and cannot be modified without the mutual consent of the parties. This Amended and Restated Work Order supercedes any prior Work Orders or amendments in their entirety, whether oral or written. The Summary Page below provides the pertinent terms of this Amended and Restated Work Order. For greater detail on a particular section, select the appropriate tab(s) above.

Work Order Actions: [Approve](#) [Reject](#) [Collaboration](#) [View Assignment](#) [Return To Work Orders](#)

General Information

Buyer Organization Name: Shell

Work Order#: [2353702](#)

Amendment: 13

Effective Date: 10/18/18

Amendment Status: Amendment Offered

On Board Date:

Fields Changed

This list indicates the fields that were changed from the previously effective version

Field	Previous Value	Amended Value
- End Date	12/31/18	12/31/19
- Duration	84 month(s)	96 month(s)
- Document Attachments	N/A	Document Attached




You can click the respective tab to review the other sections of the Work Order (Position and Resource Detail, Buyer Organization Detail, and Supplier Organization Detail) that are also <read only>. If you want to propose adjustments to the Work Order, use the Collaboration button or contact the Shell SBSC-Contractor-Service-Desk@shell.com.

4. Click **approve** ([Approve](#)) to accept the changes. The screen returns to the Work Orders – Amendments to Approve list screen. The Work Order / Effective Amend. # column now displays a


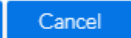


hyphenated Work Order / Effective Amendment number and the Amend. In Process # column is now blank.

To reject a Work Order amendment:

1. Complete Steps 1 through 3 as described above.
2. Click **reject** (). The Specify Decline Amendment Reason screen appears.

Specify Decline Amendment Reason

Actions:  

Reason(s):* ☐ Resource is no longer available
☐ Bill rate is outside acceptable range
☐ Assignment duration is unacceptable
☐ Start date not acceptable
☐ Assignment skills and roles do not meet resource requirements

Other Reason: _____

All reason(s) will be made public to the internal and external user(s) who have access to this information.

3. Use the checkboxes to indicate your reason(s) for declining. This is a required field as noted by the **red asterisk (*)**. (Multiple selections are permitted.) Use the Other Reason text field if there is no reason match. NOTE: As indicated, all reason(s) will be made public to the internal and external user(s) who have access to this information.
4. Click **OK** to confirm and exit. A notice is sent to all impacted business stakeholders and the status updates to Working — Amendment Declined.

To amend a Work Order:

Contact the Shell SBSC-Contractor-Service-Desk@shell.com or Hiring Manager if adjustments are needed to a Work Order. Once the Work Order status updates to “Effective”, the record becomes <read-only> to the Supplier firm.

To edit an Assignment:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
2. Click the **effective assignments** link located in the Work Orders/Assignments section of the Status column on the right-hand side of your dashboard screen. The Assignments list screen appears.



My IQN ▾ Jobs ▾ Resources ▾ Work Orders/Assignments ▾ Reports ▾ Invoicing ▾ Set Up ▾

April 5, 2019 Welcome, Supplier

Activities

General
[Logout](#)

Jobs
[View Job Opportunities](#)

Matches
[View Competition's Activity](#)
[View Supplier Organizations Job Matches](#)
[View Supplier Organizations Resource Matches](#)

Work Orders
[View Assignments](#)
[View Work Orders / Amendments](#)

Resources
[Create Resource](#)

Reports
[Custom Reports](#)
[View Report Output](#)

User Profile
[Update Contact Information](#)

System Updates

None available

News and Updates

None available

Status ⓘ

[Recalculate](#)

Jobs
Available Jobs 7249

Matches
Supplier Organization Resources In Draft State 944

Work Orders/Assignments
Assignments Awaiting Start Date 101
Current Active Contractors 11657
Effective Assignments 16402
Amendments To Approve 108
Offers To Approve 128
Targeted Offers To Approve 119

Reports
Expiring Reports 0


NOTE: This list is specific to YOUR user role and reflects Assignments for which you are the designated contact person.



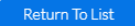
- Use the Results per Page pull-down selection option on the right-hand side of the screen to adjust how many records display per screen.
- Click the ⓘ Search & Filter (effective assignments) link at the top of your screen for additional search/filter options.
- Click any column header to change the sort order of the list based on that column. Click the column header a second time to sort in reverse order.
- Click the GO arrow ➔ to open the Assignment record based on the selection made in the Assignment Actions column.


Assignments Restore Default Sort Order Export ⓘ									
Select All Modify									
	Assignment ID	Job Title	Buyer Organization	Resource	Supplier Organization	Start Date	End Date	Assignment Status	Assignment Actions
<input type="checkbox"/>	12056892	Scheduler (4)	Beeline (Beeline)	Beeline, Canada (60573024)	Beeline, Canada (60573024)	11/20/18	12/31/19	Effective	view assignment history ➔
<input type="checkbox"/>	12031806	**Identified Candidate for Payroll	Beeline (Beeline)	Beeline, Canada (60573024)	Beeline, Canada (60573024)	11/28/18	6/1/19	Effective	view assignment history ➔

3. Click the hyperlink number in the Assignment ID column. The assignment record opens on the Assignment Management Summary tab. Notice that the assignment record is divided into multiple tabs and the most of data fields are <read only>.




4. Click any section tab to go directly to that tab or use the next/previous buttons at the bottom of the screen to navigate between tabs.
5. Update the General Supplier Organization tab if adjustments are needed for:
 - Managing Supplier Agent
 - Supplier Accounting Representative
 - Resource ID or email address
6. Update the Onboarding Checklist tab to include the Contractor's email address and any status updates to the checklist activities. **NOTE:** The Onboarding Checklist tab can only be accessed from the Assignment Management Summary tab, or, use the direct method described in the next section.
7. Update the Assets tab if adjustments are needed (*optional*).
8. Click the **save** button () on the Assignment Management Summary tab if you made ANY changes/adjustments on ANY tab. This is the only "save" option for the assignment record. A Validation Message displays to indicate you have saved successfully.

General Buyer Organization	Cost Codes	General Supplier Organization	Onboarding Checklist	Assets	Assignment Management Summary
Assignment Management information is viewable by all users who have access to this Work Order or Work Order Amendment.					
Actions:   					

9. Click the **return to list** button () to exit the assignment record and go back to the effective assignments list.

To adjust the onboarding checklist and contractor email address (direct method):

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard appears.
2. Hover over the Work Orders/Assignments menu drop-down arrow located in the Header Menu bar.
3. Click **Assignments**. The Assignments list screen appears.
4. Use the  Search & Filter (Assignments) filters at the top of your screen to create a search query to retrieve the Assignment records you need to adjust. *Optional:* Use the **effective assignments** link located in the Status column on the right-hand side of your dashboard under Work Orders/Assignments if the contractor is already on assignment.
5. Locate the Resource/Assignment ID that needs adjustment.



6. Select **update contractor email** using the down arrow in the Assignment Actions column for the record you want to adjust.

Assignments Restore Default Sort Order Export									
Select All Modify									
	Assignment ID	Job Title	Buyer Organization	Resource	Supplier Organization	Start Date	End Date	Assignment Status	Assignment Actions
<input type="checkbox"/>	12056892	Scheduler (4)	SHC (Shell International Chemical Co.)	Schuler, Candice (60573027)	Source Automation RW	11/20/18	12/31/19	Effective	<div>view assignment history → configure account update contractor email view assignment history →</div>
<input type="checkbox"/>	12031806	**Identified Candidate for Payroll	SHC (Shell International Chemical Co.)	Kick, Leticia (94753119)	Source Automation RW	11/28/18	6/1/19	Effective	<div>view assignment history → configure account update contractor email view assignment history →</div>

7. Click the GO arrow → to open the Assignment record with the Onboarding Checklist tab active.

General Buyer Organization	Cost Codes	General Supplier Organization	Onboarding Checklist	Assets	Assignment Management Summary
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Assignment Management Information is viewable by all users who have access to this Work Order or Work Order Amendment.

Onboarding Checklist

Contractor Email Address: _____

Drug Test Complete ☐ yes ☒ no

Drug Test Results _____

Characters Remaining: 1000

Fingerprinting ☐ yes ☒ no

Background Check ☐ yes ☒ no

Background Test Results _____

Characters Remaining: 1000

Orientation Completed ☐ yes ☒ no

ATA Recieved ☐ yes ☒ no

Previous Next

8. Enter/Adjust the contractor's email address and make adjustments to the Onboarding Checklist as needed.
9. Click the **save** button (Save Changes) on the Assignment Management Summary tab to save your changes. This is the only "save" option for the assignment record. A Validation Message displays to indicate you have saved successfully.
10. Click the **return to list** button (Return To List) to exit the assignment record and go back to your assignments list.