



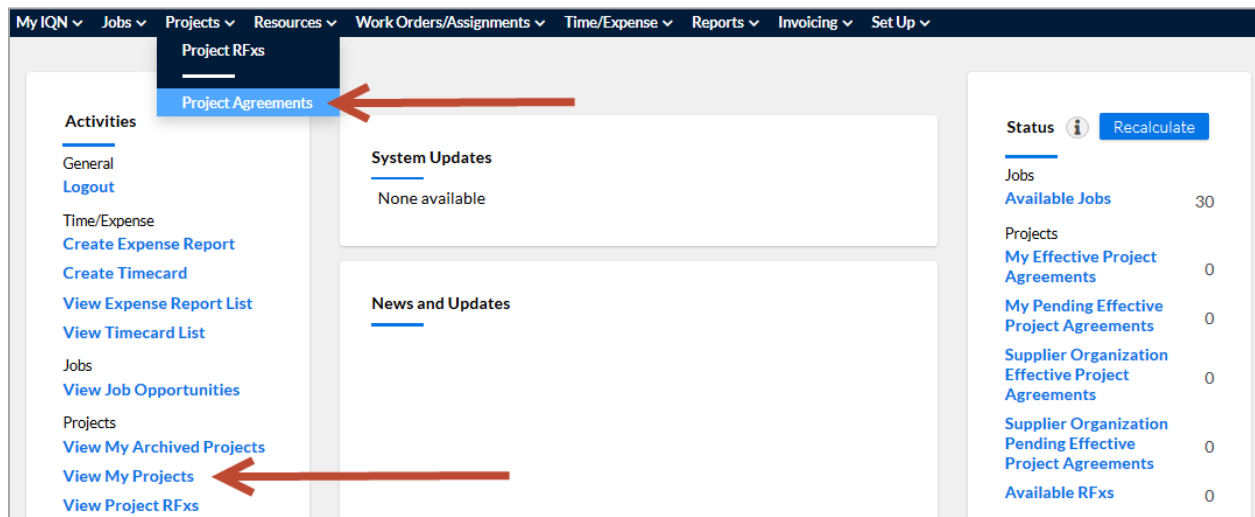
Accept or Reject a Project Agreement or eSOW

This job aid describes the steps necessary for a supplier to accept or reject a SOW (Statement of Work) or Project Agreement.

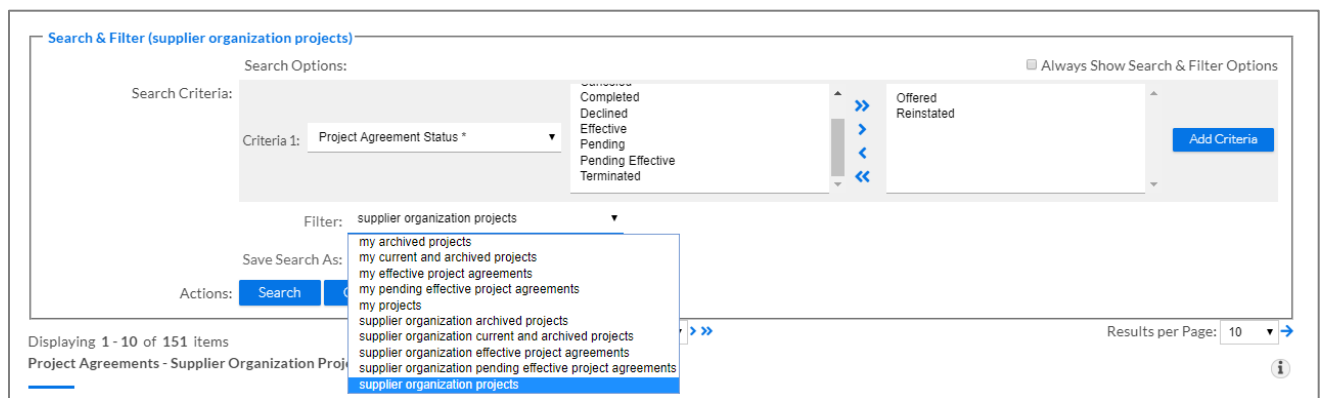
User role requirements for project tasks are provided at the end of this document.

To review the Project Agreement / eSOW:

1. Log in to IQNavigator using your *user name* and *password* and go to your Alternate UI dashboard.
2. Use either the Project Agreements pull-down menu list in the header bar or one of your dashboard Projects hyperlinks to access your Project Agreements list screen.



NOTE: If your user role visibility settings allow you to view all project agreements for your organization (e.g., Organization Supplier Project Manager), you will need to use the Search & Filter feature on the Project Agreements list screen to view a complete list of project agreements. A project agreement ready for approval has a status of 'offered' or 'reinstated'. Set the filters as shown below to create a complete list.





3. Scroll through the list to locate the SOW/project agreement you want to review.

Search & Filter (my projects)								
Displaying 1 - 1 of 1 items								
Project Agreements - My Projects Restore Default Sort Order Export								
Project Agreement / Effective Change Request #	> Change Request In Process #	> Project Agreement Name	> Supplier Project Manager	> Billing Submitter	> Total Milestone Reimbursement Amount	> Start Date	> Last Modified	> Project Agreement Status
12212262		Test PA - training	Mohamed Elmaghrabi		0.00	1/1/19	2/7/19 3:17 PM	Offered

4. Click the Project Agreement / Effective Change Request # hyperlink in the left-hand column. The Project Agreement record opens in <read-only> format for your review.

Project Agreement - Test PA - Training (12212262)

Actions:

[Return To List](#)[Approve](#)[Reject](#)[Print](#)

Agreement Details

Project Agreement Name: Test PA - training

Project Agreement Status: **Offered**

Project Identifier: 12345

Buyer Organization: [International Petroleum Services \(IPS\) Corporation](#)

Supplier Organization Reporting Alias: [Tom Shell](#)

Purchase Contract Start Date: 1/1/19

Purchase Contract End Date: 12/31/19

Location of Work: AB-LIVINGSTON PLACE-CALGARY United States Calgary

Organization Unit

Global Contract No. No MSA Available

Expenses

Other :

Note The rates in this Purchase Contract are effective rates on the creation date of the Contract unless adjusted later and should not be used for future reference.

Schedule 1 Project Description and Invoice Options

Document Attachment 2

5. *Optional:* Click the hyperlink in the **SOW Attachment** section to view the SOW document or use the print button in the Actions section at the top of the screen to print the SOW for offline review.

To accept a Project Agreement:

- Complete Steps 1 through 5 as listed above.
6. Click the **approve** button ([Approve](#)) in the Actions section at the top of the screen to accept the project agreement. The system returns you to the Project Agreements list screen and the status of the project agreement updates to "Effective".
 7. Assign a Billing Submitter to your approved Project Agreement. Although this is a separate process, it should be completed as soon as the Project Agreement is accepted to ensure that there are no delays in future project related payments. The Billing Submitter is the only supplier user role with visibility to view and submit project-based payment requests (e.g., milestone) for approval by the buyer organization. The role of Supplier Project Manager and Billing Submitter can be assigned to the same user but these roles can be assigned to different users as well.

To assign a Billing Submitter to a Project Agreement:

- a. Complete Steps 1 and 2 as detailed in the section above.



- b. Locate the project to which you need to assign the Billing Submitter, then select **manage project** in the Actions column drop-down selection list and click the blue Go arrow (➔).

Project Agreements - My Effective Project Agreements								
Restores Default Sort Order Export								
Project Agreement / Effective Change Request #	Change Request In Process #	Project Agreement Name	Supplier Project Manager	Billing Submitter	Total Milestone Reimbursement Amount	Start Date	Project Agreement Status	Actions
6477671 / 4		Project PA 12204262 (12204262) - Administrative Services (12204262)	Administrative Services	Administrative Services	0.00	10/1/15	Effective	manage project ➔
7220885 / 5		Administrative Services (12204262) - Administrative Services (12204262)	Administrative Services	Administrative Services	0.00	3/1/16	Effective	manage project ➔

- c. Click the **Visibility** tab on the Project Management tabs screen. The Project Management – Visibility screen displays.

Project Management - Test PA (12204262) Close

Project Agreement Transactions Create Project Agreement Transaction Resources **Visibility** Collaboration

Actions: Save Changes Cancel Changes

Project Assignments

Supplier Project Manager: * <-- select value -->

Billing Submitter: * <-- select value -->

* indicates a required field.

- d. Notice that the Supplier Project Manager field defaults to the Supplier Project Manager selected by Shell when the project agreement was created. Use the drop-down selection list if this needs to be updated.
- e. Use the drop-down selection list to assign the Billing Submitter.
- f. Click **save changes** (Save Changes) in the Actions section to continue. A Validation Message displays to indicate, “You have saved successfully.”
- g. Click the **close** button (Close) in the header bar to return to the Project Agreements list.

To reject a Project Agreement:

- Complete Steps 1 through 5 as listed above.
6. Click the **reject** button (Reject) in the Actions section at the top of the screen to decline the project agreement or request modifications from the Shell Project Manager. The Enter Reasons for Rejecting Project Agreement screen displays.

Enter Reasons For Rejecting Project Agreement

Actions: Ok Cancel


Reason(s): * ☐ Bill rate is outside of the acceptable range
☐ Start date is not acceptable
☐ Assignment duration is not acceptable
☐ Project terms do not meet requirements

Other Reason: _____

7. Use the checkbox to indicate why you are rejecting the project agreement. *Optional:* Use the **Other Reason** text box to explain why you are rejecting the project agreement.



NOTE: You may choose more than one checkbox and the Reason(s) list may vary depending on the type of project agreement.

8. Click the **Ok** button () in the Actions section at the top of the screen to complete the process. An email notification, including your reasons, is sent to the Shell Project Manager. The system returns you to the Project Agreements list screen and the status of the project agreement updates to "Declined".

USER ROLE REQUIREMENTS:

Project Payment Requests access is limited to the following user roles:

- Billing Submitter -- ability to view and submit project-based milestone invoice requests
- Organization Supplier Project Manager – ability to view ALL project agreements within their system organization structure
- Supplier Project Manager – ability to respond to project agreements

If you need access to project-based files, please contact your supplier firm to have your IQN user profile adjusted.