Project Consultant Time Writing

This job aid describes how to create a resource rate table payment request from consultant time cards (consultant time writing). This type of payment request is used to bill Shell for the hours or days that resources have worked on a particular project. The rate tables for these payment requests are the rate cards agreed to between your firm and Shell in the MSA (Master Service Agreement). This job aid also describes how to handle a resource rate table payment request that has been rejected by Shell. Only supplier users with the assigned role of **Billing Submitter** can create payment requests and the **Billing Submitter** must be designated on the PA (Project Agreement).

This process combines all timecards entered on a project agreement into one resource payment request. It is then submitted by the supplier for approval by the project's billing approver. This eliminates the need for billing approvers to verify consultant time through Excel attachments and also enables project managers and other stakeholders to run IQNavigator reports to gather and analyze long-term data on consultant time writing.

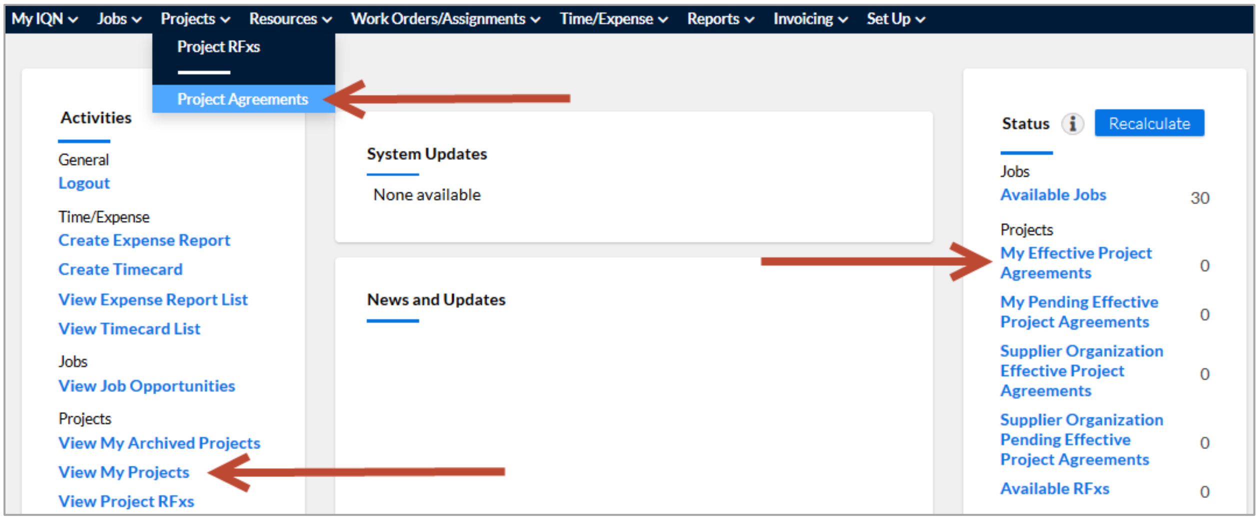
User role requirements for access to project payment requests is provided at the end of this document.

Standard Formats Used for Payment Request Data Entry

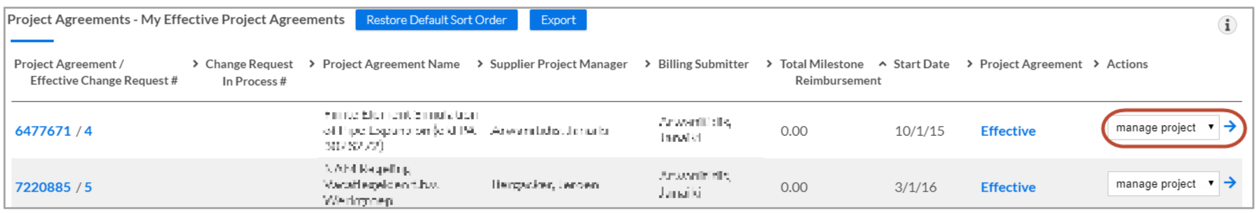
- **Field Name*** (with asterisk**)** – A red asterisk (*) indicates a field that is a required entry for IQNavigator. These fields must be completed or the system will not allow the user to proceed if the field is left blank.
- **Field Name** (bold text) – **Bold** text indicates a field that is not a required entry for IQNavigator, but it is a required entry for the Shell process. These fields should not be left blank since it will cause problems downstream and disrupt the process.
- Field Name (no formatting) – Standard text indicates a field that is neither a required entry for IQNavigator nor required for the Shell process. These fields can either be left blank or retain their default value.
- All Other Fields -- If a field displayed in IQNavigator is not mentioned in the job aid; it is not relevant for Shell and can be ignored.

To create a resource rate table payment request:

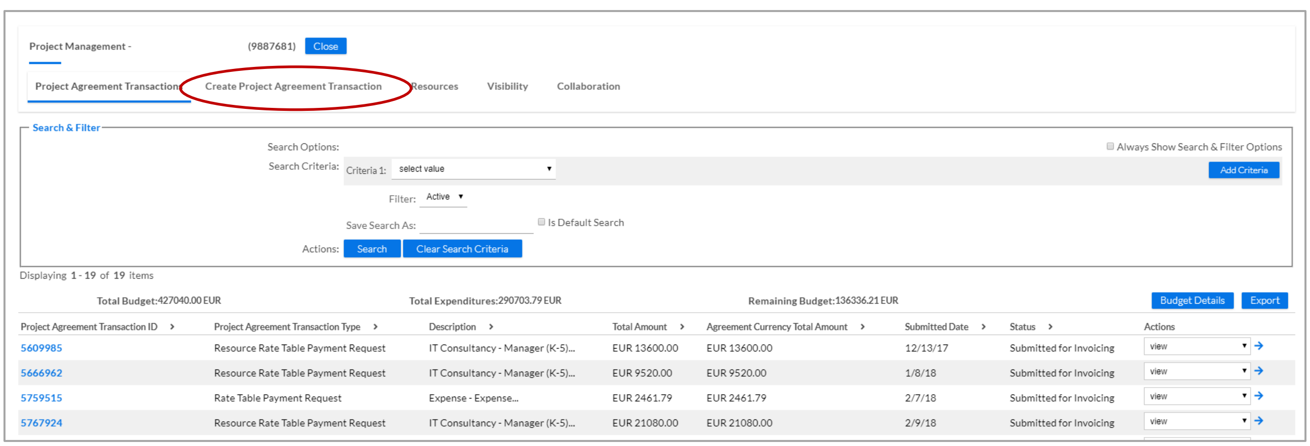
1. Log in to IQNavigator using your *user name* and *password* and go to your Alternate UI dashboard.
2. Use either the Projects pull-down menu in the header bar or one of your dashboard Projects hyperlinks to access your Project Agreements list screen.



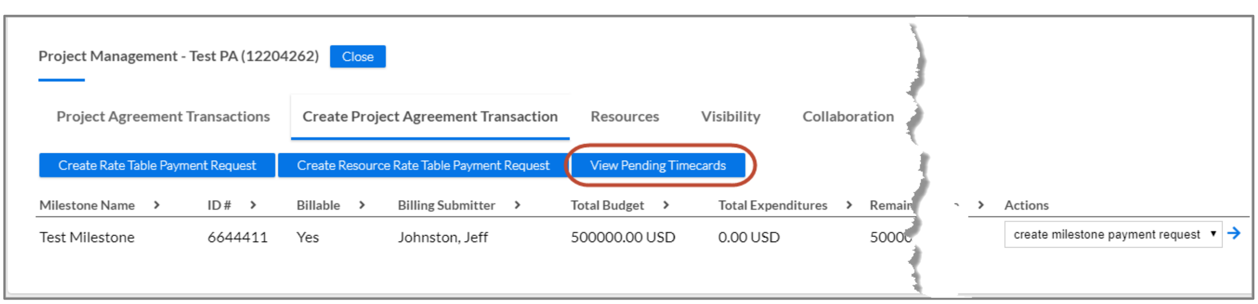
3. Locate the project for which a resource payment request is to be created then select **manage project** in the Actions drop-down selection list and click the blue Go action arrow (➔).



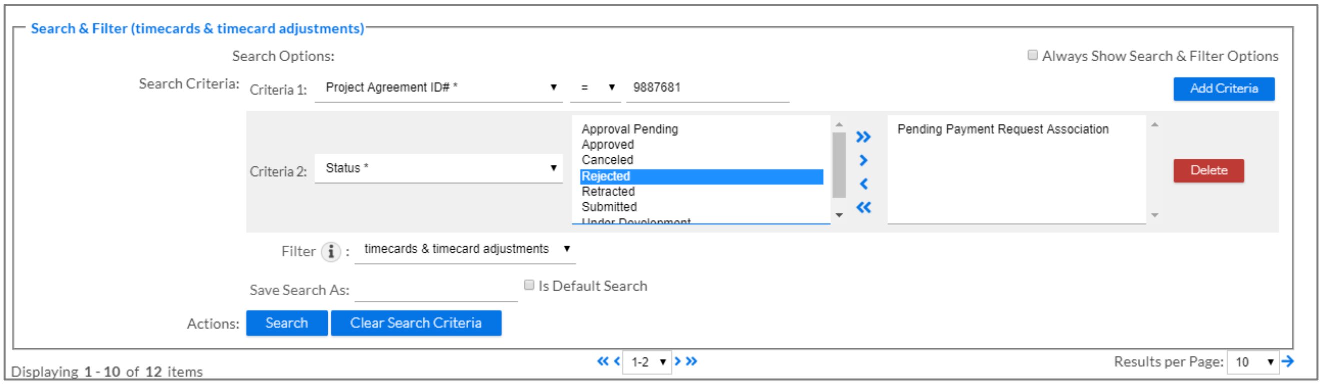
4. Click the **Create Project Agreement Transaction** tab on the Project Agreement Transactions list screen.



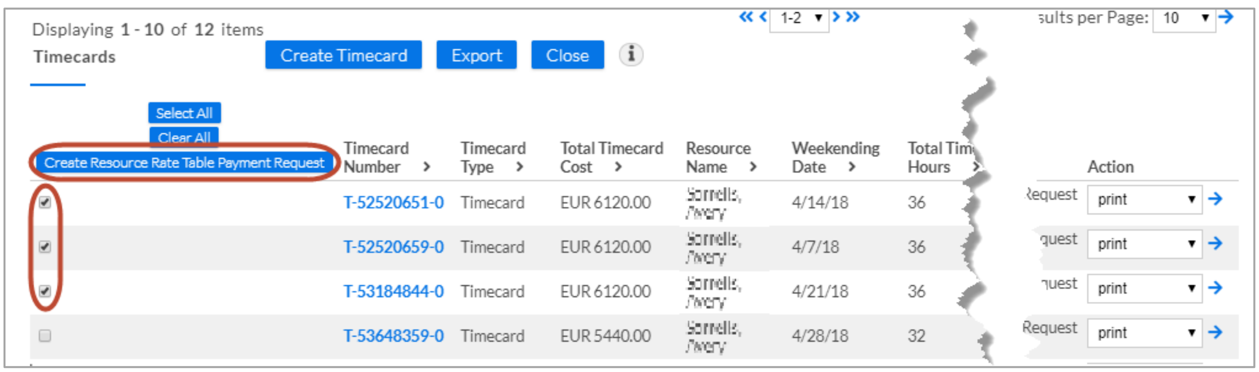
5. Click the **view pending timecards** tab above the transactions list.



6. Use the Search & Filter feature at the top of the screen to create a list of all timecards ready for association to a resource payment request. Set the search Criteria 1 to Status and select “Pending Payment Request Association” as the status value. Set the Filter to “timecards & timecard adjustments”. Then click <**search**>. (NOTE: Your Search & Filter settings may already be set up this way.)

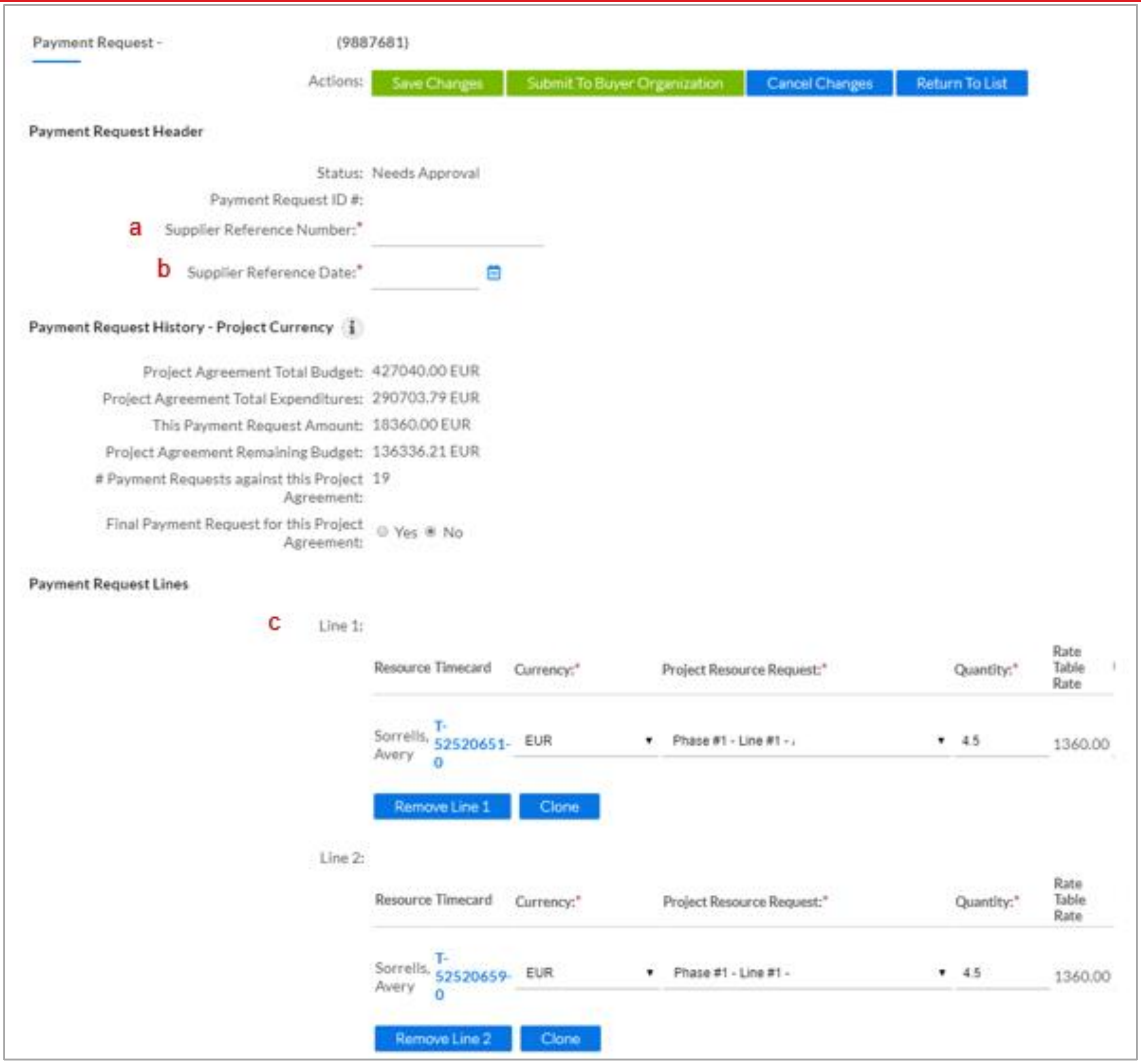


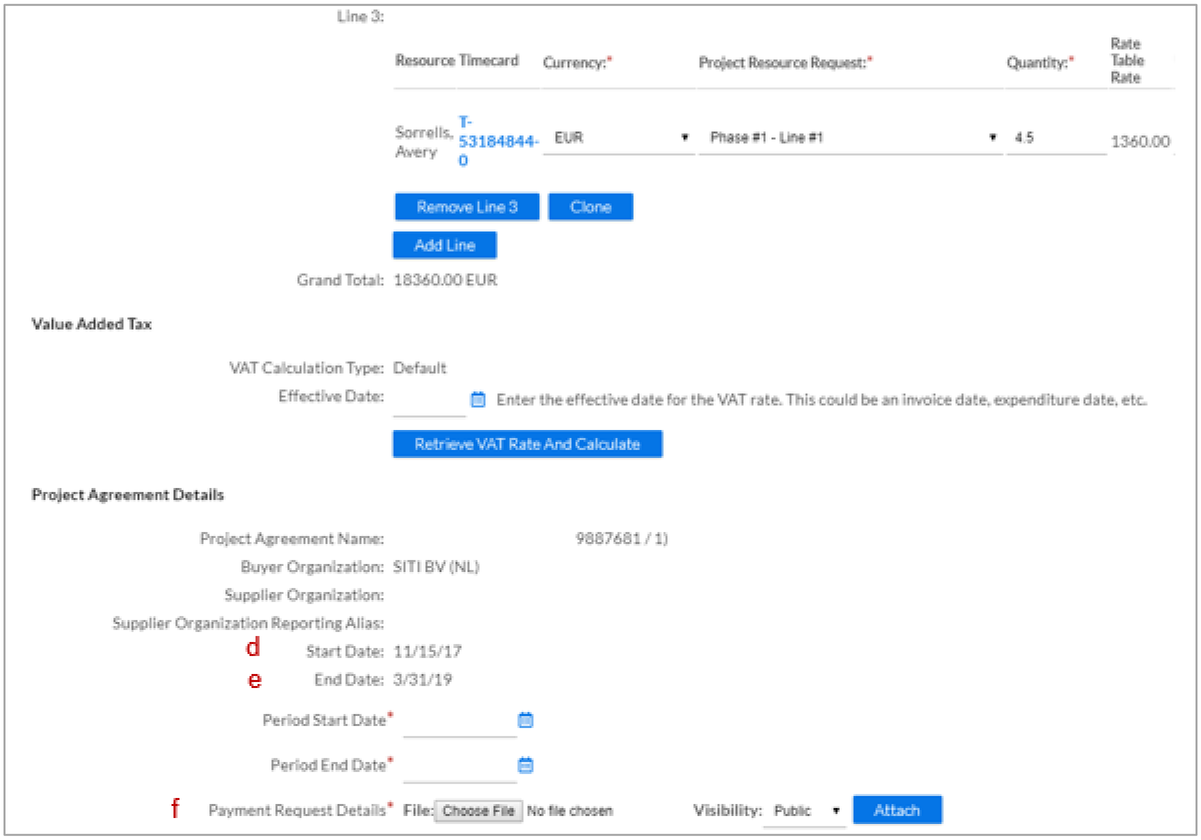
7. Use the checkboxes in the left-hand column to select all the timecards you want to include in your resource payment request from the results list. When your selections are complete, click the **create resource rate table payment request** tab at the top of the column.



8. Complete your resource rate table payment request using the guidelines provided in the chart below. Remember to follow the **Standard Formats Used for Payment Request Data Entry** listed at the beginning of this job aid.

Resource Rate Table Payment Request
(with Timecards)





a	**Supplier Reference Number:** Supplier Invoice Number. Enter the reference number that your firm uses to map the Shell payments against IQN generated invoices back to your own financial system.
b	**Supplier Reference Date**: The day the payment request is entered.
c	**Payment Request Lines:** Verify that each timecard you selected in Step 7 has auto-populated as a line item in this section. Make adjustments as needed. Enter comments/clarifications if needed for the Shell Billing Approver. **Currency**: Currency defaults from the resource line item associated with the timecard. ⚠ Do not change. **Project Resource Request**: Project Resource Request defaults from the resource line item associated with the timecard. ⚠ Do not change. **Quantity**: Quantity defaults from the resource line item associated with the timecard. **Comment**: Enter any comments for the Shell Billing Approver. **Deliverable Start Date/Deliverable End Date**: Enter the applicable dates for each timecard.

d	**Period Start Date:** The start date of the billing period. This field drives no logic in IQNavigator but is tied to important Shell reports.
e	**Period End Date:** The end date of the billing period. This field drives no logic in IQNavigator but is tied to important Shell reports.
f	**Payment Request Details:** Supplier Invoice. Attach an Excel spreadsheet or other supporting information that provides a basis for the Shell Billing Approver to approve your resource payment request. ⚠ **This is still a required field even though the timecard functionality has been enabled.**

9. Click the **submit to buyer organization** tab in the Actions section when your resource payment request is complete. A Validation Message indicates if your submit is successful. The payment request is then sent to Shell for approval.

   ⚠ If you don't see **submit** button, remember that only **Billing Submitter** is able to submit payment request to Shell for approval. To assign a Billing Submitter to a Project Agreement, go to the Visibility tab and use the selection list. Complete instructions are available in the "Select the Billing Submitter (Project Agreements)" Supplier Job Aid.

   ⚠ Error messages display when your submit is not successful. Make **ALL** adjustments as indicated and click submit again.

   Optional: Click the **save changes** button (Save Changes) to return and complete your payment request at a later time.

   ⚠ You need to complete **ALL** required fields in order to save your changes and exit this screen.

10. Click the **return to list** button (Return To List) to return to the Project Agreement Transaction screen.

To retract a resource rate table payment request:

- Complete Steps 1 through 3 as listed above.

4. Click the Project Agreement Transaction ID hyperlink in the left-hand column for the payment you need to retract.

Project Agreement Transaction ID ›	Project Agreement Transaction Type ›
5609985	Resource Rate Table Payment Request
5666962	Resource Rate Table Payment Request
5759515	Rate Table Payment Request

5. Click the **retract approval request** button (Retract Approval Request) in the Actions section.

   ⚠ You can retract an approval request at any time until Shell has approved the payment request.

6. Indicate your reason for retracting the payment request.

7. Click the **Ok** button (Ok) in the Actions section 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.

To manage rejected payment requests:

When a payment request is rejected by Shell, an email notification is sent to the supplier's Billing Submitter. The Billing Submitter can then review the rejected payment request and determine what steps to take next.

- Complete Steps 1 through 3 as listed above.

4. Click the **Rejected** hyperlink in the Status column of the Project Agreement Transactions screen. The Rejection Reason screen displays.

Remaining Budget:136336.21 EUR — Budget Details — Export

	Total Amount	Agreement Currency Total Amount	Submitted Date	Status	Actions
-	EUR 12240.00	EUR 12240.00	2/15/19	Rejected	view
	EUR 13600.00	EUR 13600.00	12/13/17	Submitted for Invoicing	view

5. Review the rejection reason entered by Shell for the entire payment request.

Event	New State	Reason
Buyer Organization Rejected	Rejected	Example reason

6. Select the **view** action from the Project Agreement Transactions screen, if you plan to make changes to the rejected payment request and then re-submit it. The system displays the Payment Request screen in edit mode.
7. Review the line item rejection reasons and make the necessary changes/adjustments.
8. Click the **submit to buyer organization** tab in the Actions section when your revised resource payment request is complete. A Validation Message indicates if your submit is successful. The payment request is then sent to Shell for approval.

⚠ If you don't see **submit** button, remember that only **Billing Submitter** is able to submit payment request to Shell for approval. To assign a Billing Submitter to a Project Agreement, go to the Visibility tab and use the selection list. Complete instructions are available in the "Select the Billing Submitter (Project Agreements)" Supplier Job Aid.

⚠ **NOTE**: It is not possible for Shell to approve partial payment requests.

Payment Requests Status List

Supplier Firm	Description	Buyer Org
Approved	The payment request has been approved and submitted for invoicing.	Approved
Editing	The payment request is in draft mode by the Supplier prior to submit to Shell.	Editing

Supplier Firm	Description	Buyer Org
Rejected	The payment request was not approved.	Rejected
Submitted for Approval	The payment request has been submitted to Shell for approval.	Submitted for Approval
Submitted for Invoicing	The payment request has been approved and is ready for invoice processing.	Submitted for Invoicing

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.