



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 list in the header bar or one of your dashboard Projects hyperlinks to access your Project Agreements list screen.



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

Project RFXs

Project Agreements

Activities

- General
- Logout
- Time/Expense
- Create Expense Report
- Create Timecard
- View Expense Report List
- View Timecard List
- Jobs
- View Job Opportunities
- Projects
- View My Archived Projects
- View My Projects
- View Project RFXs

System Updates

None available

News and Updates

Status Recalculate

Jobs

Available Jobs 30

Projects

- My Effective Project Agreements 0
- My Pending Effective Project Agreements 0
- Supplier Organization Effective Project Agreements 0
- Supplier Organization Pending Effective Project Agreements 0
- Available RFXs 0

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 (➔).

Project Agreements - My Effective Project Agreements 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	Start Date	Project Agreement	Actions
6477671 / 4		IT CONSULTANCY - MANAGER (K-5)...	Johnston, Jeff	Johnston, Jeff	0.00	10/1/15	Effective	manage project ➔
7220885 / 5		IT CONSULTANCY - MANAGER (K-5)...	Johnston, Jeff	Johnston, Jeff	0.00	3/1/16	Effective	manage project ➔

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

Project Management - (9887681) Close

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

Search & Filter

Search Options:

Search Criteria: Criteria 1: select value Always Show Search & Filter Options Add Criteria

Filter: Active

Save Search As: Is Default Search

Actions: Search Clear Search Criteria

Displaying 1 - 19 of 19 Items

Total Budget: 427040.00 EUR Budget Details Export

Total Expenditures: 290703.79 EUR Export

Remaining Budget: 136336.21 EUR

Project Agreement Transaction ID	Project Agreement Transaction Type	Description	Total Amount	Agreement Currency Total Amount	Submitted Date	Status	Actions
5609985	Resource Rate Table Payment Request	IT Consultancy - Manager (K-5)...	EUR 13600.00	EUR 13600.00	12/13/17	Submitted for Invoicing	view ➔
5666962	Resource Rate Table Payment Request	IT Consultancy - Manager (K-5)...	EUR 95200.00	EUR 95200.00	1/8/18	Submitted for Invoicing	view ➔
5759515	Rate Table Payment Request	Expense - Expense...	EUR 2461.79	EUR 2461.79	2/7/18	Submitted for Invoicing	view ➔
5767924	Resource Rate Table Payment Request	IT Consultancy - Manager (K-5)...	EUR 21080.00	EUR 21080.00	2/9/18	Submitted for Invoicing	view ➔

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

Project Management - Test PA (12204262) Close

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

Create Rate Table Payment Request **Create Resource Rate Table Payment Request** **View Pending Timecards**

Milestone Name	ID #	Billable	Billing Submitter	Total Budget	Total Expenditures	Remain	Actions
Test Milestone	6644411	Yes	Johnston, Jeff	500000.00 USD	0.00 USD	50000	create milestone payment request ➔



- 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.)

Search & Filter (timecards & timecard adjustments)

Search Options: Always Show Search & Filter Options

Search Criteria: Criteria 1: Project Agreement ID# * = 9887681 [Add Criteria](#)

Criteria 2: Status * Pending Payment Request Association [Delete](#)

Filter: timecards & timecard adjustments

Save Search As: Is Default Search

Actions: [Search](#) [Clear Search Criteria](#)

Displaying 1 - 10 of 12 items Results per Page: 10

- 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.

Displaying 1 - 10 of 12 items Results per Page: 10

Timecards [Create Timecard](#) [Export](#) [Close](#) [i](#)

[Select All](#) [Clear All](#)

[Create Resource Rate Table Payment Request](#)

	Timecard Number	Timecard Type	Total Timecard Cost	Resource Name	Weekending Date	Total Time Hours	Action
<input checked="" type="checkbox"/>	T-52520651-0	Timecard	EUR 6120.00	Sonnelle, Jovany	4/14/18	36	request print
<input checked="" type="checkbox"/>	T-52520659-0	Timecard	EUR 6120.00	Sonnelle, Jovany	4/7/18	36	request print
<input checked="" type="checkbox"/>	T-53184844-0	Timecard	EUR 6120.00	Sonnelle, Jovany	4/21/18	36	request print
<input type="checkbox"/>	T-53648359-0	Timecard	EUR 5440.00	Sonnelle, Jovany	4/28/18	32	Request print

- 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)

Payment Request - (9887681)

Actions: Save Changes Submit To Buyer Organization Cancel Changes Return To List

Payment Request Header

Status: Needs Approval

Payment Request ID #: _____

a Supplier Reference Number: * _____

b Supplier Reference Date: * _____

Payment Request History - Project Currency

Project Agreement Total Budget: 427040.00 EUR

Project Agreement Total Expenditures: 290703.79 EUR

This Payment Request Amount: 18360.00 EUR

Project Agreement Remaining Budget: 136336.21 EUR

Payment Requests against this Project Agreement: 19

Final Payment Request for this Project Agreement: Yes No

Payment Request Lines

C Line 1:

Resource Timecard	Currency:*	Project Resource Request:*	Quantity:*	Rate Table Rate
Sorrells, T-52520651-0 Avery 0	EUR	▼ Phase #1 - Line #1 -	▼ 4.5	1360.00
Remove Line 1 Clone				

Line 2:

Resource Timecard	Currency:*	Project Resource Request:*	Quantity:*	Rate Table Rate
Sorrells, T-52520659-0 Avery 0	EUR	▼ Phase #1 - Line #1 -	▼ 4.5	1360.00
Remove Line 2 Clone				



Line 3:

Resource Timecard	Currency*	Project Resource Request*	Quantity*	Rate Table Rate
Sorrells, T- Avery 53184844- 0	EUR	Phase #1 - Line #1	4.5	1360.00

Remove Line 3 Clone

Add Line

Grand Total: 18360.00 EUR

Value Added Tax

VAT Calculation Type: Default

Effective Date: Enter the effective date for the VAT rate. This could be an invoice date, expenditure date, etc.

Retrieve VAT Rate And Calculate

Project Agreement Details

Project Agreement Name: 9887681 / 1)

Buyer Organization: SITI BV (NL)

Supplier Organization:

Supplier Organization Reporting Alias:

d Start Date: 11/15/17

e End Date: 3/31/19

Period Start Date*

Period End Date*

f Payment Request Details* File: No file chosen Visibility: Public

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 () 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 () 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 () 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.



- Click the **Ok** button () 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.
- 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	EUR 12240.00	2/15/19	Rejected	view		→
EUR 13600.00	EUR	EUR 13600.00	12/13/17	Submitted for Invoicing	view		→

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

Event	New State	Reason
Buyer Organization Rejected	Rejected	Example reason

- 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.
- Review the line item rejection reasons and make the necessary changes/adjustments.
- 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.