

Select the Billing Submitter (Project Agreements)

This job aid describes the steps necessary to assign the Billing Submitter on a Project Agreement. 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 it is not required.

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

To select a Billing Submitter on a Project Agreement:

- 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 links to access your Project Agreements list screen.

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3. 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 action arrow (→).

Project Agreements - My Effective Project Agreements Restore Default Sort Order Export							i
Project Agreement / > Change Request 3 Effective Change Request # In Process #	> Project Agreement Name	 Supplier Project Manager 	> Billing Submitter	 Total Milestone Reimbursement 		> Project Agreement	> Actions
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4. Click the **Visibility** tab on the Project Management tabs screen. The Project Management – Visibility screen displays.

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Project Management -	Close	
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Actions:	Save Changes Cancel Changes	
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Supplier Project Manager : * 👔	 situation + • 	
Billing Submitter:*	< select value> V	
	* indicates a required field.	

- 5. 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.
- 6. Use the drop-down selection list to designate the Billing Submitter. The Billing Submitter is the person who will be responsible for submitting payment requests against the project agreement. If your organization only has one designated Billing Submitter, then the system automatically defaults to this user. Adjustments to the Billing Submitter field can be made at any time throughout the project lifecycle.
- 7. Click **save changes** (Save Changes) in the Actions section to continue. A Validation Message displays to indicate, "You have saved successfully."
- 8. Click the **close** button (^{Close}) in the header bar to return to your Project Agreements list.

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.