



Submit a Resource to a Project Agreement

This job aid describes the steps necessary for a supplier to submit a resource to a project agreement. This applies to project agreements that include Time & Material tracking (either billable or non-billable resources). Suppliers are required to submit a resource if the project includes Time & Material tracking.

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

To submit resources to a project agreement:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
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.

The screenshot shows the IQNavigator dashboard with the following elements:

- Header Bar:** My IQN, Jobs, Projects, Resources, Work Orders/Assignments, Time/Expense, Reports, Invoicing, Set Up.
- Left Sidebar:** 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).
- Project RFxs Dropdown:** Project RFxs, Project Agreements (highlighted with a red arrow).
- System Updates:** None available.
- News and Updates:** (Empty section).
- Status Panel:** Recalculate button, 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 to which you are adding a resource 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								
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		Project Agreement Name	Supplier Project Manager	Billing Submitter	0.00	10/1/15	Effective	manage project →
7220885 / 5		Project Agreement Name	Supplier Project Manager	Billing Submitter	0.00	3/1/16	Effective	manage project →

4. Click the **Resources** tab on the Project Management event tracking screen.



Project Management - Test PA (12201262) [Close](#)

[Project Agreement Transactions](#) [Create Project Agreement Transaction](#) [Resources](#) [Visibility](#) [Collaboration](#)

Click on 'add resources' to create and submit quick resources or choose from your list of active resources.

Action: [Add Resources](#)

Project Agreement Resource Information

Currency: EUR
Project Phase #1:

#	Rate Type	Rate Table	Job Title	Rate Table Rate	Adjusted Rate	Rate Is Negotiable	Billable Resource	Number of Resources	Est. Start Date / Est. End Date	Estimated Units	Estimated Cost	Comments
				EUR	EUR				1/1/19		EUR 750000.00 - EUR 0.00/2821	

- Click the **add resources** button ([Add Resources](#)) in the Actions section. The Proposed Project Resources screen opens. The Project Agreement Resource Information section at the top of the screen lists the requested Project Agreement resources along with a summary of the Rate Tables.
- Use the options in the Resources section to either select an existing resource from your Resource Pool or create a Quick Resource record to add a new resource. Required fields are indicated by a red asterisk (*). If you use the Quick Resource method, click the **add new** button ([Add New](#)) to add the Quick Resource to the Assigned Resources selection box list.

It is mandatory for the supplier to submit a resource for any Project Agreement that includes Time & Material tracking.

Resources

Create Quick Resource

Name: * (First, Middle, Last)

Unique Resource ID : Date of Birth (DDMM) - Four of First - Four

Date of Birth: [Generate Unique Id](#)

Managing Supplier Agent : <-- select value -->

Resume File : [Choose File](#) No file chosen

Action: [Add New](#) [Duplicate Search](#)

Specify Resources to Submit

Resources

- Action: (id: 7977505)
- Resource: (id: 7977505)
- Resource: (id: 7977505)
- Resource: (id: 7977505)
- Resource: (id: 7977505)
- Resource: (id: 7977505)
- Resource: (id: 7977505)

[Search Resources](#)

Assigned Resources

<-- No Items -->

- Use the pull-down selection lists in the Resource Details section to select the Job Title and assign the Supplier Account Rep (SAR). The red asterisk (*) indicates required fields. You do not need to complete the Start Date, End Date, Rate Details, or Supplier Project Manager fields. These fields will be auto-populated by IQNavigator.



Resource Details

Job Title: Supplier Project Manager:

Supplier Account Rep (SAR): Start Date: End Date:

Bill Rate Unit:

Rate Details:

Pay Rate	Mark-Up	%	Bill Rate
OT Pay Rate	OT Mark-Up	%	OT Bill Rate
DT Pay Rate	DT Mark-Up	%	DT Bill Rate

Actions:

* indicates a required field.

8. Click the **add** button () in the Actions section at the bottom of the screen. The system refreshes and returns to the Project Management event tracking screen and the resources you created and/or selected now display in a list in the Supplier Organization Resources section of this screen.

Supplier Organization Resources									
<input type="button" value="Submit"/> <input type="button" value="Retract"/>	Name (Profile)	Job Title	Supplier Project Manager	Supplier Account Rep (SAR)	Requested Bill Rate / OT Bill Rate	Requested Start Date - End Date	Resource Status	Validation Message(s)	Work Order
<input type="checkbox"/>	Smith, John	Project 1 - Under 1 - Just Bill - Analyst (1/1/19 - 5/31/19) EUR 600.00		Supplier On-Boarding, Shell			Approval Pending		
<input type="checkbox"/>	Smith, John	Project 1 - Under 1 - Just Bill - Analyst (1/1/19 - 5/31/19) EUR 600.00		Supplier On-Boarding, Shell			Approval Pending		
<input type="checkbox"/>	Smith, John	Project 1 - Under 1 - Just Bill - Analyst (1/1/19 - 5/31/19) EUR 600.00		Supplier On-Boarding, Shell			Needs Approval		edit →
<input type="checkbox"/>	Smith, John	Project 1 - Under 1 - Just Bill - Analyst (1/1/19 - 5/31/19) EUR 600.00		Supplier On-Boarding, Shell			Needs Approval		edit →
<input type="checkbox"/>	Smith, John	Project 1 - Under 1 - Just Bill - Analyst (1/1/19 - 5/31/19) EUR 600.00		Supplier On-Boarding, Shell			Needs Approval		edit →

9. Use the checkboxes in the left-hand column to indicate the candidates you want to submit. Then click the submit button () in the section header bar to complete the process.

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.