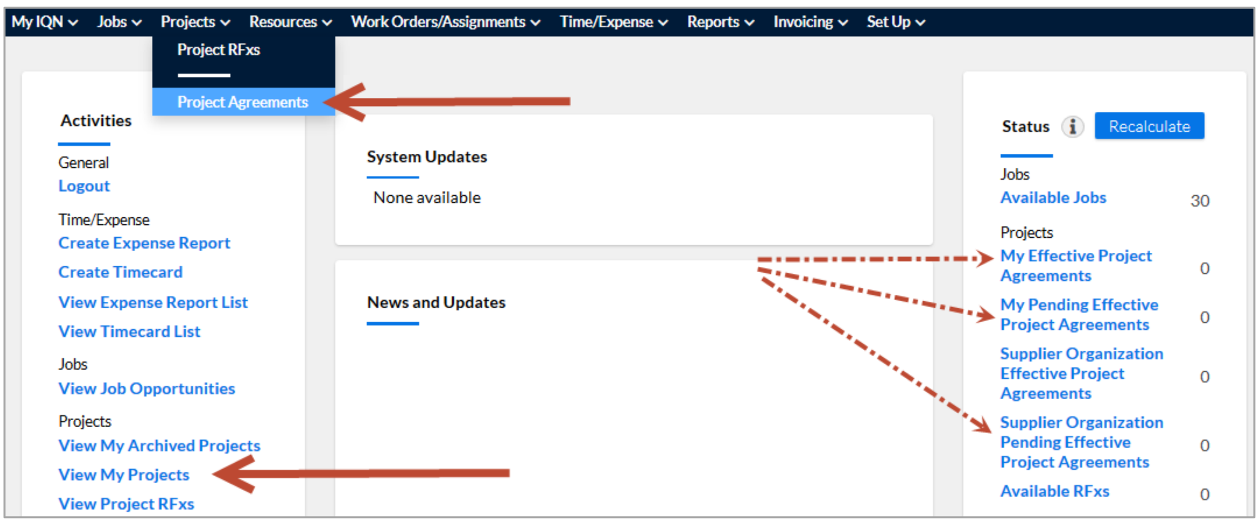
Submit a Resource to a Project Agreement

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.

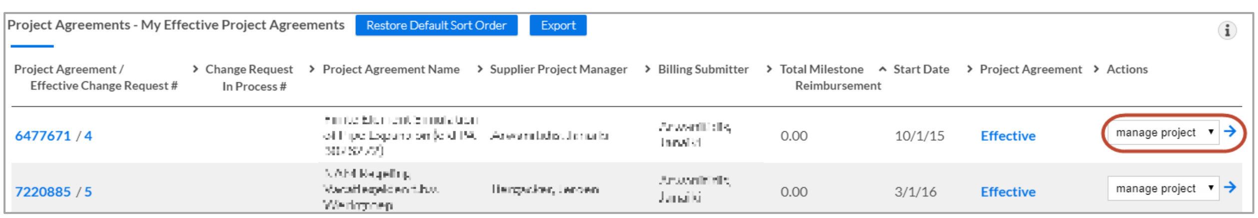
User role requirements for project tasks are provided at the end of this document.

To submit resources to a project agreement:

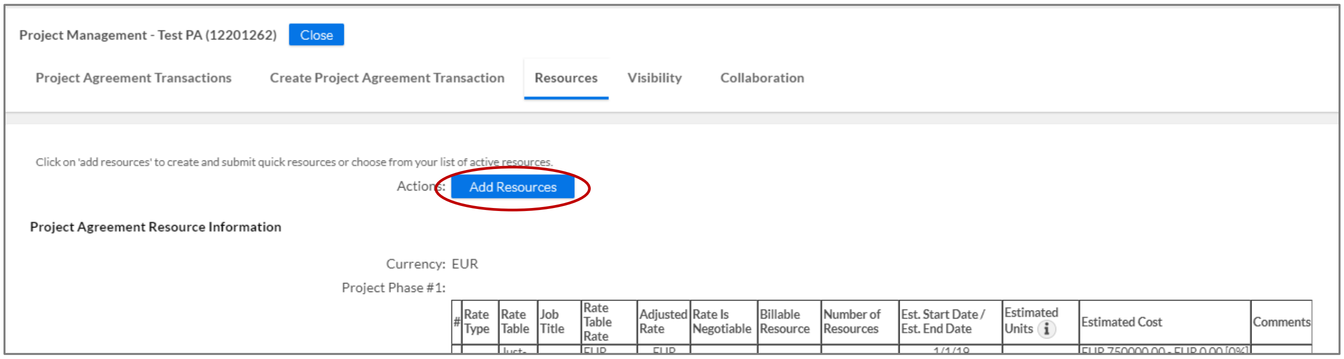
1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
2. Use either the Projects pull-down menu list in the header bar or one of your dashboard Projects hyperlinks to access your Project Agreements list screen.



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 (➜).



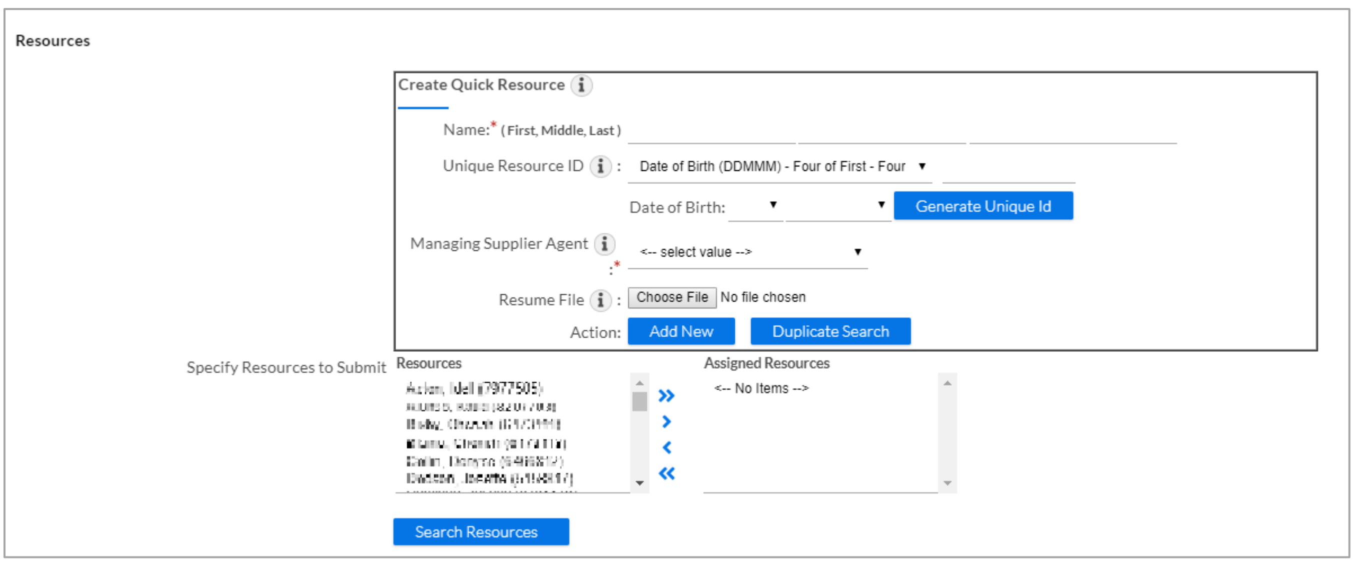
4. Click the **Resources** tab on the Project Management event tracking screen.



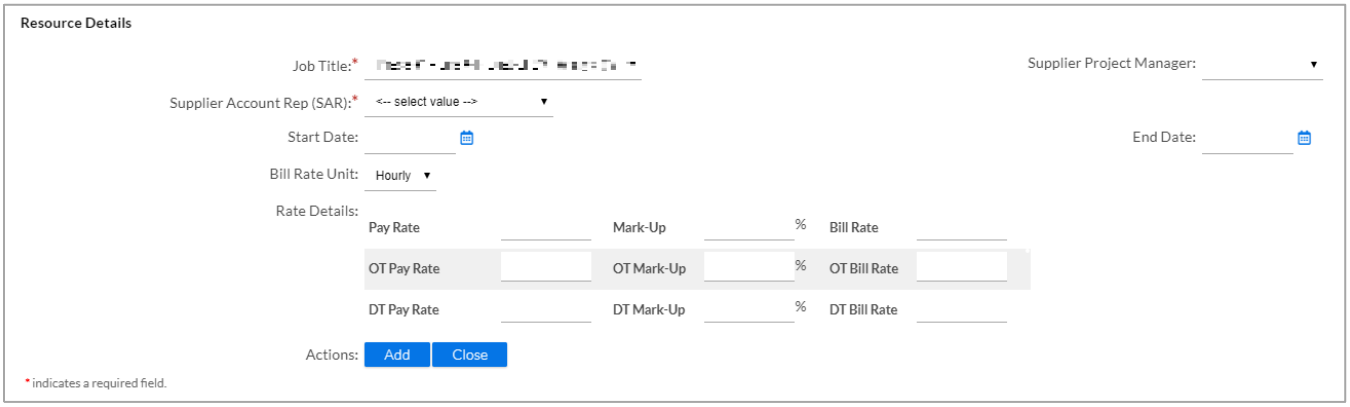
5. Click the **add resources** button (Add Resources) in the Actions section. The Proposed Project Resources screen opens. The Project Agreement Resource Information section at the top of the screen lists the requested Project Agreement resources along with a summary of the Rate Tables.

6. 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.

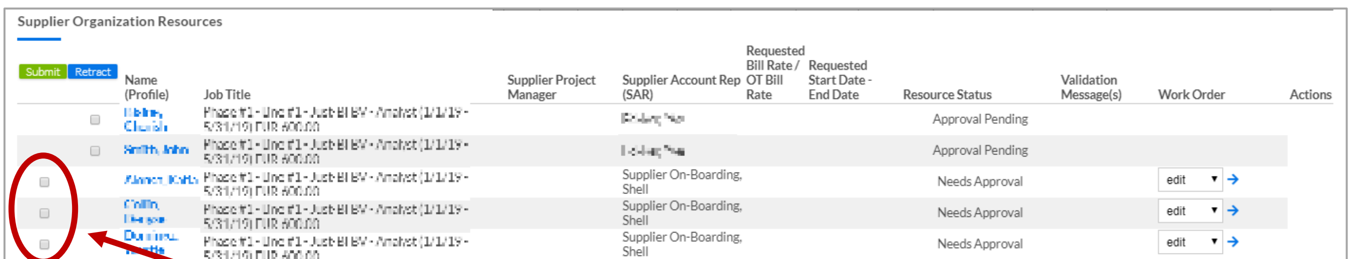
   ⚠ It is mandatory for the supplier to submit a resource for any Project Agreement that includes Time & Material tracking.



7. 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.



8. Click the **add** button (Add) 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.



9. Use the checkboxes in the left-hand column to indicate the candidates you want to submit. Then click the submit button (Submit) 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.