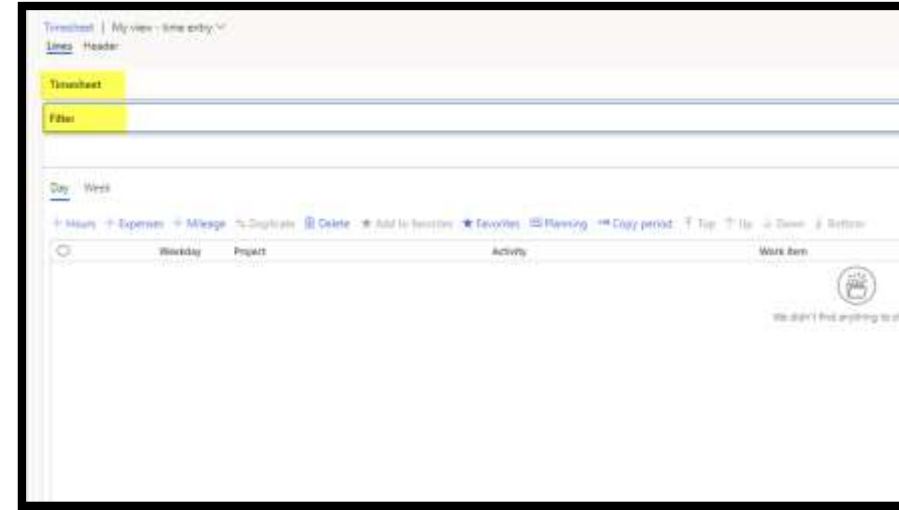


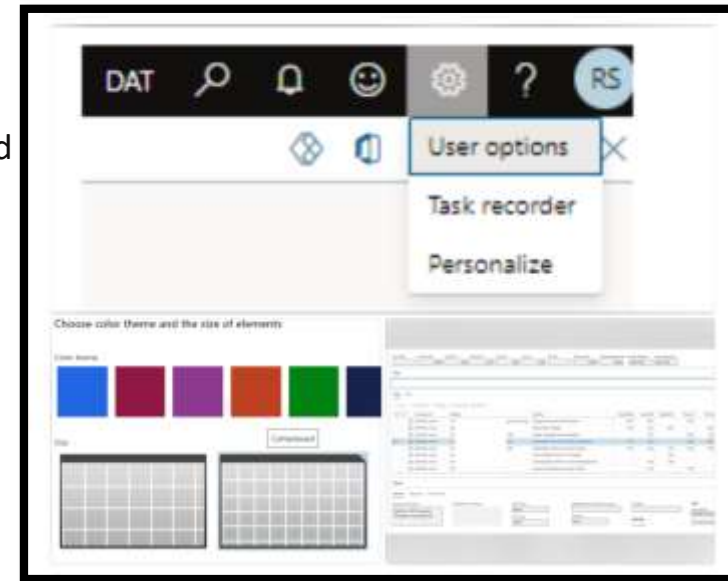
TIPS FOR A BETTER EXPERIENCE

1. Collapse the sections you don't want to see by click on the header.



2. Use *Compressed Mode* to see more in one screen.

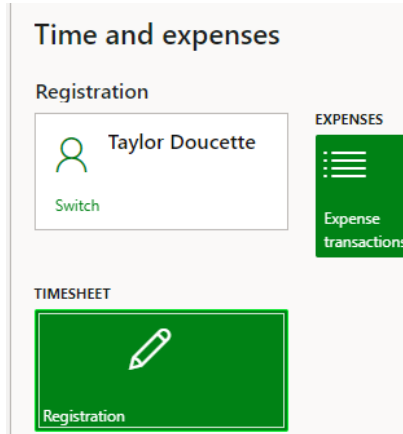
- Select User Options from Settings on the Nav Bar
- Select Preferences and the Compressed Option
- You can now see your entire timesheet in one screen - With Totals and Details / Comments!



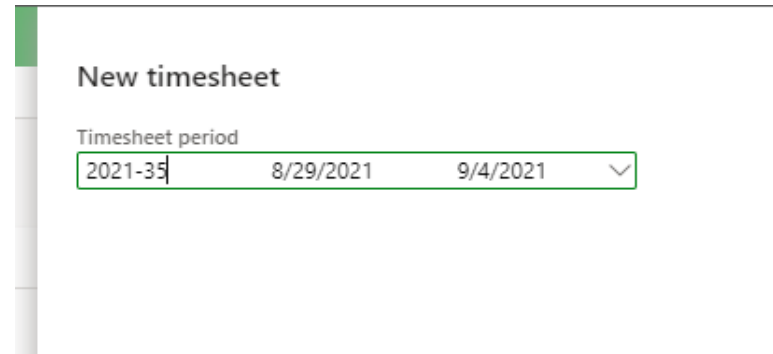
3. Right-click on columns to hide them, or drag them over to move them. Save your views.

SUBMITTING TIME

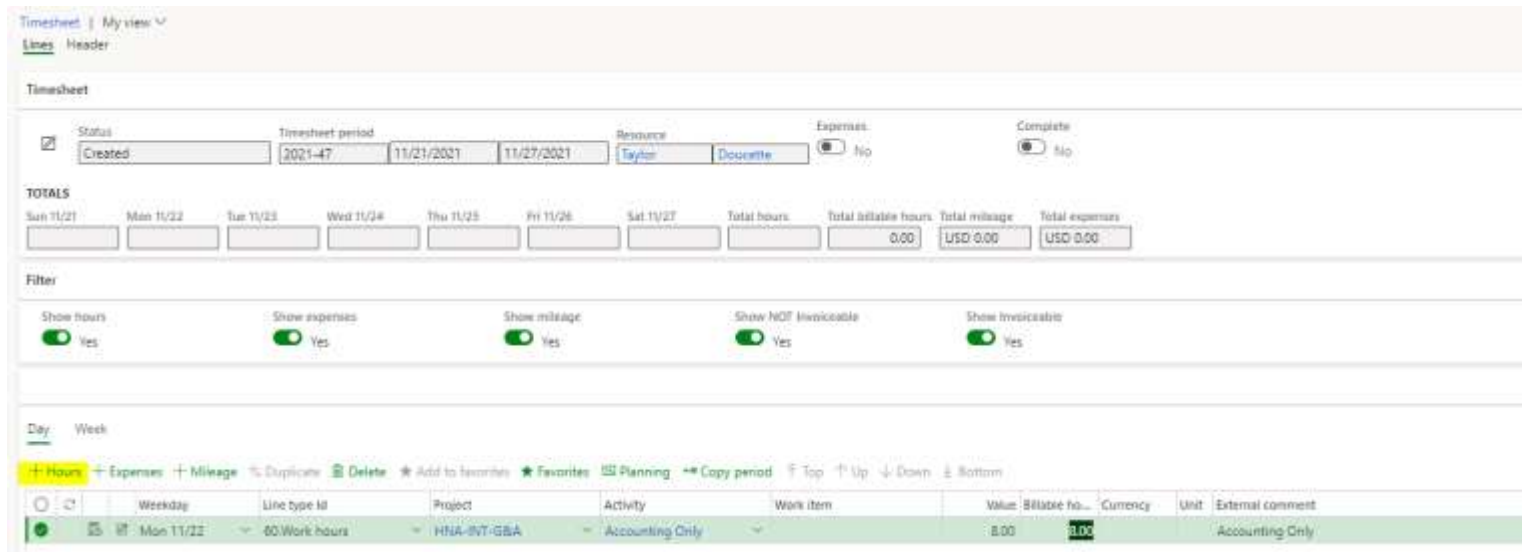
1. Under Time & Expenses, choose Registration



2. Choose the correct timeframe



3. Start entering time by clicking + Hours midway down the screen



SUBMITTING TIME

4. Once all your time is entered, click Submit on the very top

- You can submit time as many times during the week as you want (see slide Submitting Time – Partial Week)
- Full time employees are required to enter at least 40 hours before timesheet can be marked Complete
- Only click Yes on the Is the timesheet complete dialog box if you are complete adding all entries (time and expenses) for that period
 - Once a timesheet is marked complete, it can only be re-opened for edits/adds by rejecting an entry

Finance and Operations

Search for a page

Save Delete + New Submit Refresh totals Options

Timesheet | My view

Lines Header

Timesheet

Status

Timesheet period

Resource

Expenses

Complete

Created

2021-47 11/21/2021 11/27/2021

Taylor Doucette

No

No

TOTALS

Sun 11/21	Mon 11/22	Tue 11/23	Wed 11/24	Thu 11/25	Fri 11/26	Sat 11/27	Total hours	Total billable hours	Total mileage	Total expenses
	8.00	8.00	8.00	8.00	8.00		40.00	40.00	USD 0.00	USD 0.00

Filter

Show hours

Show expenses

Show mileage

Yes

Yes

Yes

Day Week

+ Hours + Expenses + Mileage + Duplicate Delete Add to favorites Favorites Planning Copy period Top Up Down Bottom

	Weekday	Line type Id	Project	Activity	Work item	Value	Billable ho...	Currency	Unit	External comment
	Mon 11/22	60.Work hours	HNA-INT-G&A	Accounting Only		8.00	8.00			Accounting Only

Is the timesheet for period 2021-47 complete?

Yes No

SUBMITTING TIME – NOTES & TRICKS

For regular work hours, the Line Type ID should be **60. Work Hours**

For travel hours, the Line Type ID should be **61. Travel Hours**

Line type Id	Proje
60.Work hours	HNA
Name	
60.Work hours	
61.Travel hours	

The Project and Activity fields are specific to the projects you have access to

- If you need access to a project not listed, please reach out to the Project Manager, Taylor Doucette, and Jess Kimmel to be added
- The Project and Activity field can be filtered by clicking on the Headers in the drop down

Line type Id	Project	Activity	Work item
60.Work hours			
Name	Project	Customer	
	ALF02001: AI Fakher D36...	AKA-PS-PR0196	↑ Sort A to Z
	AUT01005: D365 F&O Im...	AKA-PS-PR0016	↓ Sort Z to A
	HNA-INT-DynAd IP Engi...	AKA-PS-PR0080	
	HNA-INT-UNIFIED OPER...	AKA-PS-PR0091	
	HNA-INT-UO Corporate: ...	AKA-PS-PR0075	
	HNA-SALES-ACTIVITY	AKA-PS-PR0078	

Name begins with

Apply Clear

SUBMITTING TIME – NOTES & TRICKS

Some Projects require a Work Item, when those are required, there will be a drop-down menu available in that field

	Work item	Value	Billable ho...	Currency	U
04-Setup and ...		0.00	0.00		
	Work item	Description	Start date		
	Admin	Administrati...	Setup and Configuration-...		
	AP	Accounts Pa...	Setup and Configuration-...		
	AR	Accounts Re...	Setup and Configuration-...		
	Bank	Bank	Setup and Configuration-...		
Billable H	DynAD	DynAD	Setup and Configuration-...		
Remote	DynAX	DynamicsAX	Setup and Configuration-...		

All timesheet entries require an External Comment. This will appear on client invoices so be sure to keep that in mind when adding that comment

it	External comment	Frc
	Description of work performed to appear on client i...	

SUBMITTING TIME – NOTES & TRICKS

You can copy previous timesheets to save time, if your week-to-week timesheet is the same/similar

1. In the new timesheet, click **Copy Period**

2. Choose the period you are copying; your previous timesheets are available from the top drop-down menu

Planning **Copy period** ↑ Top ↑ Up ↓ Down

ity ▼ Work item

Import timesheet

Parameters

From timesheet

2021-46 11/14/2021 11/20/2021 Taylor Doucette ▼

To timesheet

2021-47 11/21/2021 11/27/2021 Taylor Doucette

Including mileage transactions

☒ Yes

Including work items

☐ No

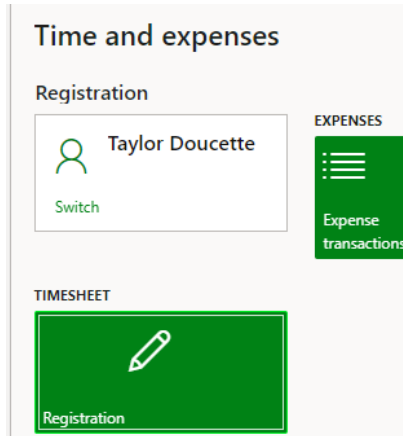
3. The timesheet will populate, and you will just need to add the Value filed for hours worked and make any other adjustments if projects/activities need to be changed

Expenses + Mileage + Duplicate Delete ★ Add to favorites ★ Favorites Planning **Copy period** ↑ Top ↑ Up ↓ Down ↓ Bottom

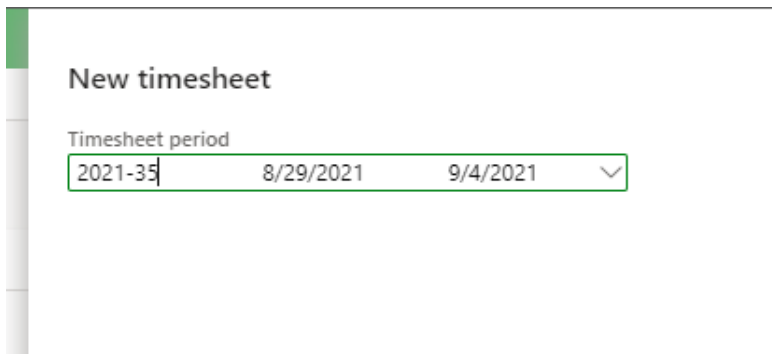
	Weekday	Line type Id	Project	Activity	Work item	Value	Billable ho...	Currency	Unit	External comment
<input checked="" type="checkbox"/>	Mon 11/22	60.Work hours	HNA-INT-G&A	Accounting Only		8.00	8.00			Accounting Only
<input checked="" type="checkbox"/>	Tue 11/23	60.Work hours	HNA-INT-G&A	Accounting Only		0.00	0.00			Accounting Only
<input checked="" type="checkbox"/>	Wed 11/24	60.Work hours	HNA-INT-G&A	Accounting Only		0.00	0.00			Accounting Only
<input checked="" type="checkbox"/>	Thu 11/25	60.Work hours	HNA-INT-G&A	Accounting Only		0.00	0.00			Accounting Only
<input checked="" type="checkbox"/>	Fri 11/26	60.Work hours	HNA-INT-G&A	Accounting Only		0.00	0.00			Accounting Only

SUBMITTING TIME – PARTIAL WEEK

1. Under Time & Expenses, choose Registration



2. Choose the correct timeframe



3. Once you enter and submit for the days needed, you will get the error message in the screenshot below

- This is expected, the time entered has been submitted but the timesheet is not complete so remaining hours can be entered in the following days

- If you get a pop-up asking if timesheet is complete, click NO so you can return to the timesheet and add the rest of the hours for the week

WARNING: Timesheet cannot be set to complete because the minimum amount of registered hours (40.00) is not yet reached

Timesheet

Status: Submitted Timesheet period: 2021-35 8/29/2021 9/4/2021 Resource: Taylor Doucette Expenses: No Complete: No

TOTALS

Sun 8/29	Mon 8/30	Tue 8/31	Wed 9/1	Thu 9/2	Fri 9/3	Sat 9/4	Total hours	Total billable hours	Total mileage	Total expense
	8.00	8.00					16.00	16.00	USD 0.00	USD 0.00

Filter

Show hours: Yes Show expenses: Yes Show mileage: Yes Show NOT Invoiceable: Yes Show Invoiceable: Yes

Day Week

+ Hours + Expenses + Mileage + Duplicate + Delete + Add to favorites + Favorites + Planning + Copy period + Top + Up + Down + Bottom

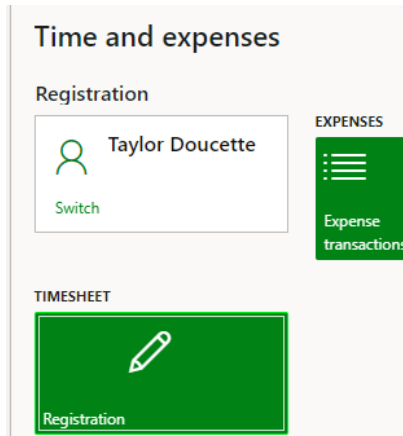
✓		Weekday	Line type Id	Project	Activity	Work item	Value
	Mon 8/30	60.Work hours	HNA-INT-G&A	Accounting Only		8.00	
	Tue 8/31	60.Work hours	HNA-INT-G&A	Accounting Only		8.00	

- Please note, the status of the entire timesheet may read Created or Submitted after this operation

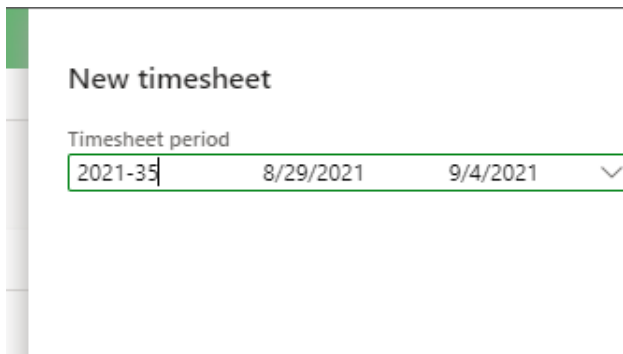
- If you want to double check the individual entries, you can hover over the icon before the date and see the status of the individual entry

SUBMITTING EXPENSES

1. Under Time & Expenses, choose Registration

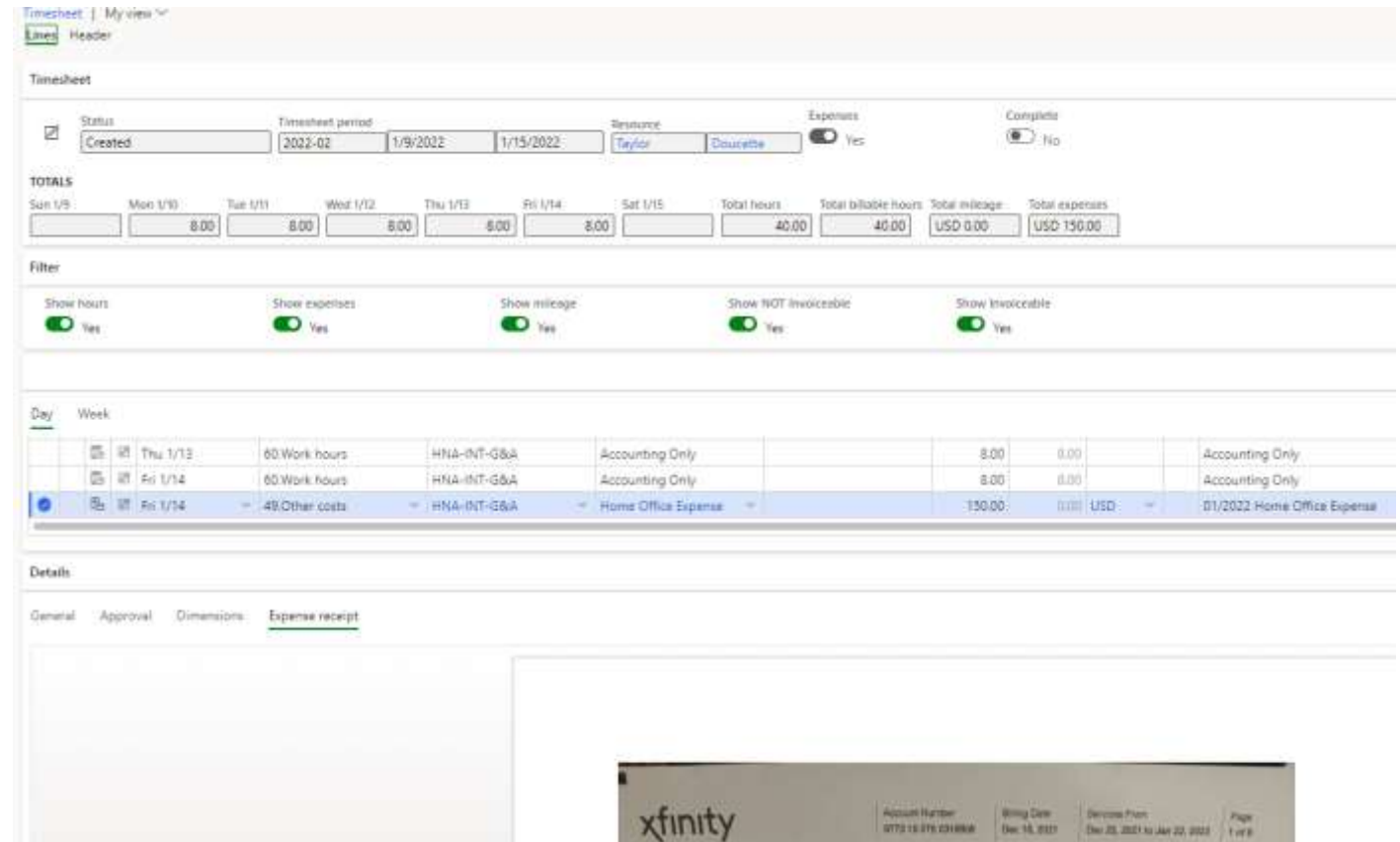


2. Choose the correct timeframe



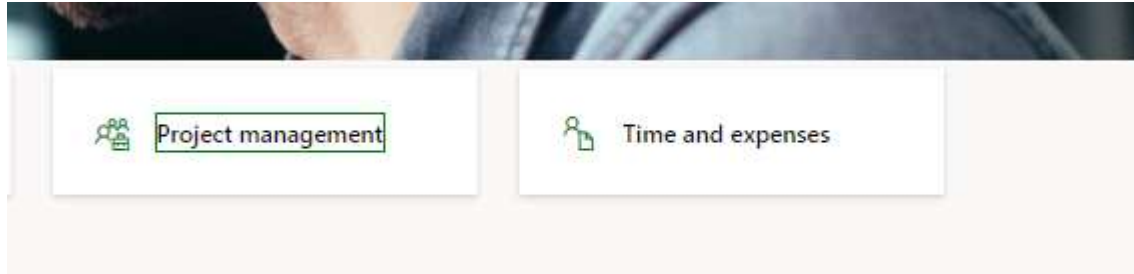
3. Expenses should be submitted on a weekly basis within your regular timesheet

- Line Type ID: choose appropriate category based on expenses being entered
- Project & Activity: only those that accept expenses will be viewable, choose appropriate one. The example below is specific for the monthly home office expense
- Receipts must be attached and done by choosing Expense Receipt tab in Details pane as shown below

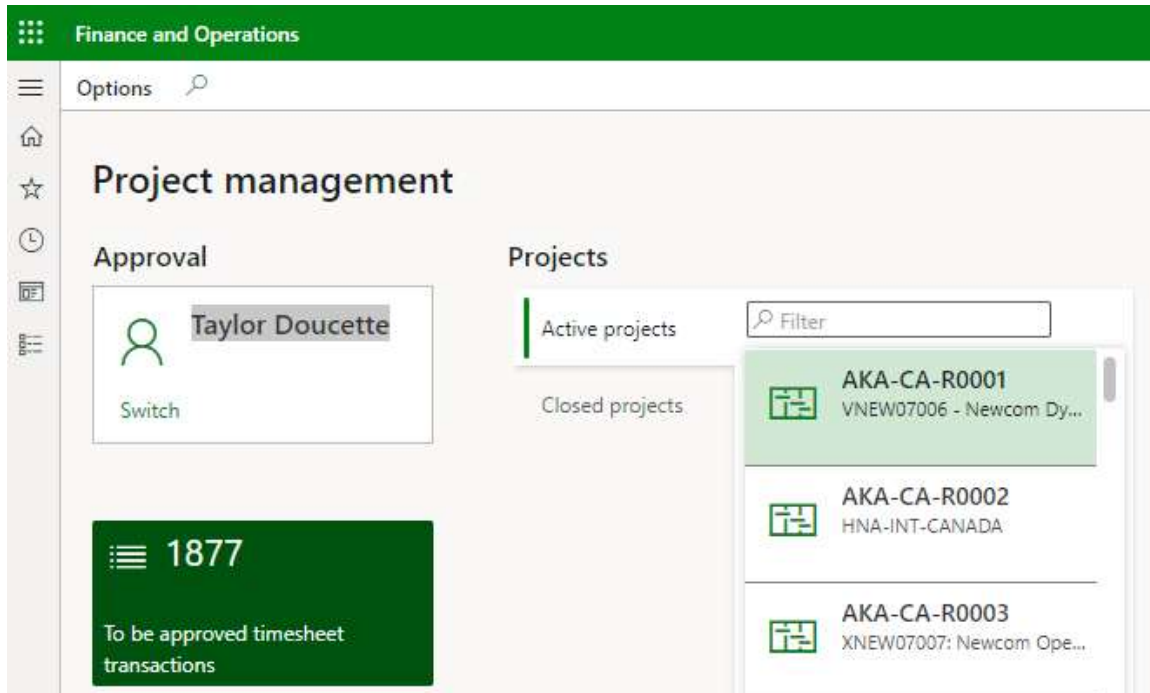


APPROVING TIME

1. On the BNext home page, click the Project Management tile



2. Select To Be Approved Timesheet Transactions – This will show you a list of all timesheets assigned to you for approval



APPROVING TIME - CONTINUED

3. The list of timesheet transactions can be filtered a number of ways and contains time and expenses that are assigned to you for approval

Finance and Operations

Search for a page

EditDelete per diem✓ Approve✗ RejectRecalculate priceSplit hour lineFunctionsOptions

To be approved timesheet transactions

My view (1)

Filter

Show work hours
Yes

Show travel hours
Yes

Show expenses
Yes

Show mileage
Yes

Invoicing filter
Show all

Invoiceable filter
Show all

Sort order
Project / Date (desc)

	Period	Date	Resource	Project	Statement of ...	Activity	Status		Value	Billabl...	Revenu...	Revenue ...	External comment	Invoi
<input type="radio"/>	2022-03	1/18/2022	Chris Auxier	Alcami AX...	Alcami AX200...	Generic Support	Submitted		1.00	1.00	0.00	0.00	AX audit trail discussion	
<input type="radio"/>	2022-02	1/13/2022	Todd Dickerson	AXI04005: ...	SOW AXI0400...	Functional Consulting	Submitted		0.50	0.50	200.00	100.00	PBI Refresh	✓
<input type="radio"/>	2022-02	1/11/2022	Todd Dickerson	AXI04005: ...	SOW AXI0400...	Functional Consulting	Submitted		1.50	1.50	200.00	300.00	Customer invoice updates	✓
<input type="radio"/>	2022-02	1/14/2022	Bryan Spillane	AUT01005...	New Request...	CR6-Technical Sup...	Submitted		4.00	4.00	225.00	900.00	Testing/dev fix for 1953	✓
<input type="radio"/>	2022-02	1/14/2022	Jolita Vilemaitiene	AUT01005...	New Request...	CR6-Functional Co...	Submitted		8.00	8.00	200.00	1,600.00	Production support - 1.5 hrs.Other - 6.5 hrs.	✓

4. You can select individual lines or multiple lines by clicking the O at the left of the entry to make the process faster

- To APPROVE an entry, simply select the line or lines and click APPROVE in the top menu bar. Once the entry is approved, it will disappear from this list
- To REJECT an entry, simply select the line or lines and click REJECT in the top menu bar. If you reject time, the COMMENT field will popup on the right and here is where you enter a note that will be emailed to the resource on how to adjust the entry

Reject

Parameters

Comment

Please resubmit to WBS activi...

APPROVING TIME – NON BILLABLE TIME

3. The list of timesheet transactions can be filtered a number of ways and contains time and expenses that are assigned to you for approval

4. You can select individual lines or multiple lines by clicking the O at the left of the entry to make the process faster

- To APPROVE an entry, simply select the line or lines and click APPROVE in the top menu bar. Once the entry is approved, it will disappear from this list
- To REJECT an entry, simply select the line or lines and click REJECT in the top menu bar. If you reject time, the COMMENT field will popup on the right and here is where you enter a note that will be emailed to the resource on how to adjust the entry

APPROVING TIME – NOTES & TRICKS

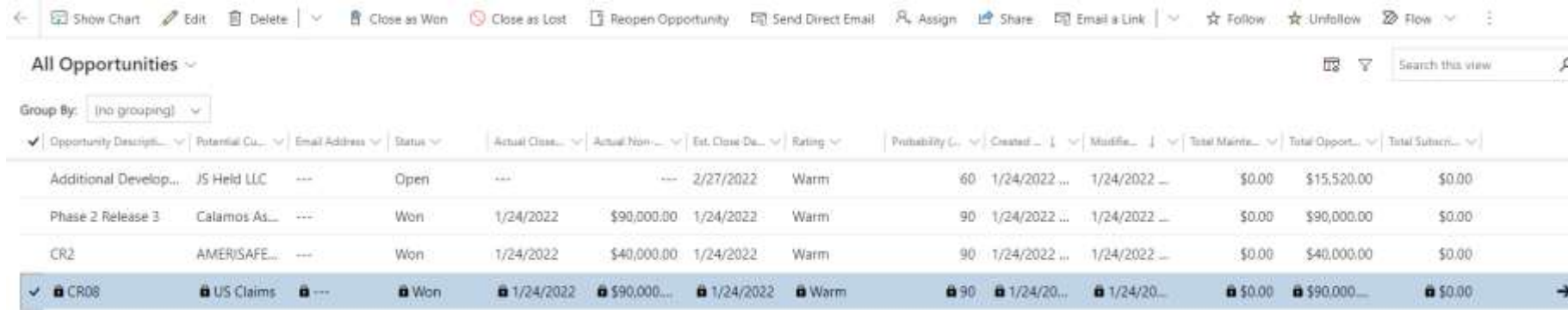
If an entry is in the right project but an incorrect WBS item, you can adjust before approving instead of having to reject the entry

- Simply select the entry you are adjusting and choose a new WBS activity from the drop-down list. Click SAVE and APPROVE and all is good

				Period	Date	Resource		Project	Statement of ...	Activity	Status	Value	Billabl...	Revenu...	Revenue ...	External comment
✓				2022-03	1/18/2022	Chris	Auxier	Alcami AX...	Alcami AX200...	Generic Support	Submitted	1.00	1.00	0.00	0.00	AX audit trail discussion
				2022-02	1/13/2022	Todd	Dickerson	AXI04005: ...	SOW AXI0400...	Name	Parent	Statement of Work				
				2022-02	1/11/2022	Todd	Dickerson	AXI04005: ...	SOW AXI0400...	Generic Support		Advanced Support Jun...	USNA-S-0...	Alcami AX20...		
				2022-02	1/14/2022	Bryan	Spillane	AUT01005...	New Request...	Non-Billable Time		Advanced Support Jun...	USNA-S-0...	Alcami AX20...		
				2022-02	1/14/2022	Jolita	Vilemaitiene	AUT01005...	New Request...	Data Migration		Germantown Project 2...	USNA-S-0...	Alcami AX20...		
				2022-02	1/13/2022	Bryan	Spillane	AUT01005...	New Request...	Design		Germantown Project 2...	USNA-S-0...	Alcami AX20...		

REQUESTING A PRE-SALES PROJECT

Find and select the Opportunity in CRM

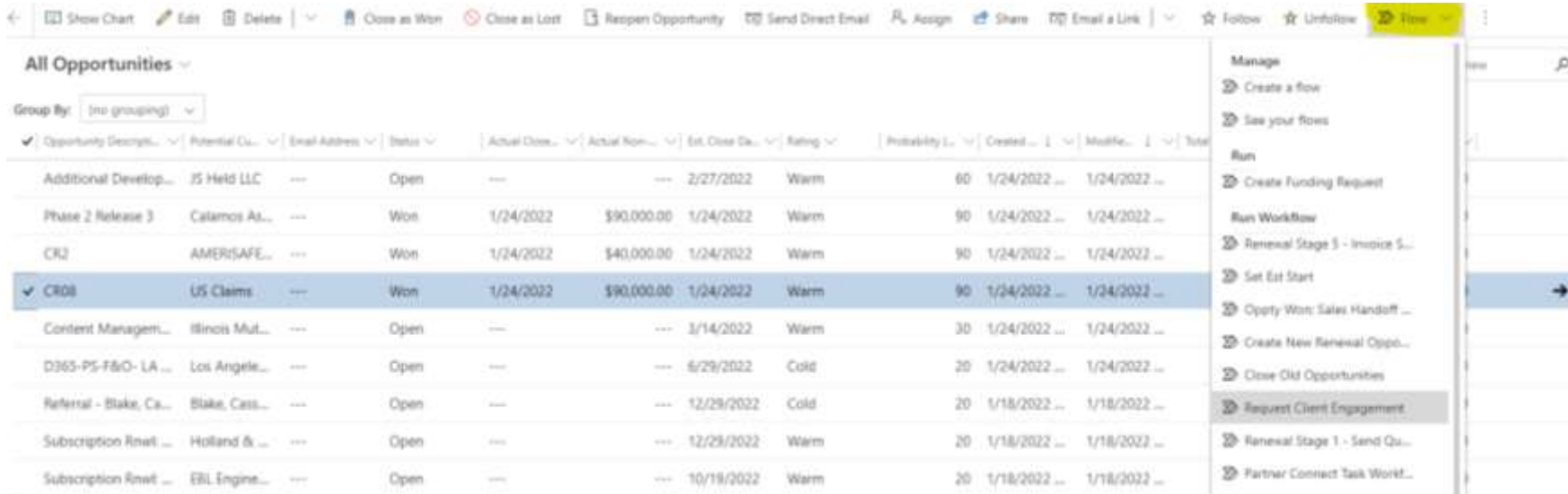


The screenshot shows the 'All Opportunities' view in a CRM system. The top navigation bar includes buttons for 'Show Chart', 'Edit', 'Delete', 'Close as Won', 'Close as Lost', 'Reopen Opportunity', 'Send Direct Email', 'Assign', 'Share', 'Email a Link', 'Follow', 'Unfollow', and 'Flow'. Below the navigation bar, there is a 'Group By' dropdown set to '(no grouping)'. The table lists various opportunities with columns for Opportunity Description, Potential Customer, Email Address, Status, Actual Close Date, Actual Non-Close Date, Est. Close Date, Rating, Probability, Created Date, Modified Date, Total Maintenance, Total Opportunity, and Total Subscription. The 'CR08' opportunity, associated with 'US Claims', is highlighted in blue. It has a status of 'Won', an actual close date of 1/24/2022, an actual non-close date of 1/24/2022, an estimated close date of 1/24/2022, a rating of 'Warm', a probability of 90, and a total opportunity value of \$90,000.00.

Opportunity Description	Potential Customer	Email Address	Status	Actual Close Date	Actual Non-Close Date	Est. Close Date	Rating	Probability	Created Date	Modified Date	Total Maintenance	Total Opportunity	Total Subscription
Additional Develop...	JS Held LLC	---	Open	---	---	2/27/2022	Warm	60	1/24/2022 ...	1/24/2022 ...	\$0.00	\$15,520.00	\$0.00
Phase 2 Release 3	Calamos Ad...	---	Won	1/24/2022	\$90,000.00	1/24/2022	Warm	90	1/24/2022 ...	1/24/2022 ...	\$0.00	\$90,000.00	\$0.00
CR2	AMERISAFE...	---	Won	1/24/2022	\$40,000.00	1/24/2022	Warm	90	1/24/2022 ...	1/24/2022 ...	\$0.00	\$40,000.00	\$0.00
✓ CR08	US Claims	---	Won	1/24/2022	\$90,000.00	1/24/2022	Warm	90	1/24/2022 ...	1/24/2022 ...	\$0.00	\$90,000.00	\$0.00

Select FLOW and Request Client Engagement

This will trigger an email to Accounting to add the project in BNext



The screenshot shows the 'All Opportunities' view in a CRM system, similar to the first image. The 'CR08' opportunity is still selected. The 'Flow' button in the top navigation bar is highlighted in yellow. A dropdown menu is open, showing various flow options. The 'Request Client Engagement' option is highlighted in blue. The menu also includes options like 'Manage', 'Create a flow', 'See your flows', 'Run', 'Create Funding Request', 'Run Workflow', 'Renewal Stage 3 - Invoice S...', 'Set Est Start', 'Oppty Won: Sales Handoff ...', 'Create New Renewal Oppo...', 'Close Old Opportunities', 'Renewal Stage 1 - Send Qu...', and 'Partner Connect Task Workl...'. The 'CR08' opportunity is highlighted in blue in the table below the menu.

Opportunity Description	Potential Customer	Email Address	Status	Actual Close Date	Actual Non-Close Date	Est. Close Date	Rating	Probability	Created Date	Modified Date	Total Maintenance	Total Opportunity	Total Subscription
Additional Develop...	JS Held LLC	---	Open	---	---	2/27/2022	Warm	60	1/24/2022 ...	1/24/2022 ...	\$0.00	\$15,520.00	\$0.00
Phase 2 Release 3	Calamos Ad...	---	Won	1/24/2022	\$90,000.00	1/24/2022	Warm	90	1/24/2022 ...	1/24/2022 ...	\$0.00	\$90,000.00	\$0.00
CR2	AMERISAFE...	---	Won	1/24/2022	\$40,000.00	1/24/2022	Warm	90	1/24/2022 ...	1/24/2022 ...	\$0.00	\$40,000.00	\$0.00
✓ CR08	US Claims	---	Won	1/24/2022	\$90,000.00	1/24/2022	Warm	90	1/24/2022 ...	1/24/2022 ...	\$0.00	\$90,000.00	\$0.00
Content Managem...	Illinois Mut...	---	Open	---	---	3/14/2022	Warm	30	1/24/2022 ...	1/24/2022 ...	\$0.00	\$0.00	\$0.00
D365-PS-F&O- LA ...	Los Angele...	---	Open	---	---	6/29/2022	Cold	20	1/24/2022 ...	1/24/2022 ...	\$0.00	\$0.00	\$0.00
Referral - Blake, Ca...	Blake, Cass...	---	Open	---	---	12/29/2022	Cold	20	1/18/2022 ...	1/18/2022 ...	\$0.00	\$0.00	\$0.00
Subscription Rnw...	Holland & ...	---	Open	---	---	12/29/2022	Warm	20	1/18/2022 ...	1/18/2022 ...	\$0.00	\$0.00	\$0.00
Subscription Rnw...	EBL Engine...	---	Open	---	---	10/19/2022	Warm	20	1/18/2022 ...	1/18/2022 ...	\$0.00	\$0.00	\$0.00

REQUESTING A PRE-SALES PROJECT

Once the Pre-Sales project is added to BNext, you will receive an email confirming it has been added






- Project Name: PRESALES ACTIVITY BY CLIENT
- WBS Activity: Client Name i.e. if you request a presales project for ABC Company, you will see a WBS Activity called ABC Company





WBS	Name	Parent
✓	PreSales Activity	
1	OPF01 Ohio Police & Fire Pension Fund	PreSales Activity
2	NSB01 National Society of Black Engineers (NSBE)	PreSales Activity
3	MAV01 Mavis Tires	PreSales Activity

REQUESTING A NEW PROJECT

A Project Request form can be found [here](#)

- Complete the form and attached the executed SOW
 - If this is the 1st project for a new client, also attached an executed MSA



Client Information			
Client Name	<input type="text"/>	Check box for a New Client	<input type="checkbox"/>
If this is a new client, you must attach the Master Services Agreement or enter a link to the agreement using the box on the right.		<div> Click here to insert a hyperlink</div> <div> Click here to attach a file</div>	
AKA Sales Person	<input type="text"/>	Check for Partner Services	<input type="checkbox"/>
AKA Project Manager	<input type="text"/>	Check box for an Azure Project	<input type="checkbox"/>
Client PO #	<input type="text"/>	Check box for a GSA Project	<input type="checkbox"/>
SOW or WO Required (use field to the right to enter a link, or to attach a file or files). * If there are license-related docs, please attach those as well.	<div>Select... *</div>	<div> Click here to attach a file</div> <div> Click here to attach a file</div> <div> Click here to attach a file</div>	

Project Information			
Project Name	<div><input type="text"/> *</div>	Project Start Date	<div><input type="text"/> </div>
Product Line	<div>Select... *</div>	Projected Live Date	<div><input type="text"/> </div>
Vertical	<div>Select... *</div>	How will the client be invoiced?	<div>Select... </div>
Client Project Manager	<input type="text"/>	Check if you require a Team Collaboration Site	<input type="checkbox"/>
Invoice Contact Name	<div><input type="text"/> *</div>	Invoice Contact Email	<div><input type="text"/> *</div>
Accounting Contact Name	<input type="text"/>	Accounting Contact Email	<input type="text"/>
Specify Travel Time	<div>Must Choose... </div>	Describe Special Travel Time Arrangements	<input type="text"/>

Use the table below to add your budgeted Task Names and Estimated Hours

Choose 'Billable' or 'Not-Billable' from the first column, then give your Task/Phase a name in the second column.



*click 'Insert Item' to add more rows

Choose Task Type Below (required)	Create Task/Phase Name	Estimated Task Hours (required)	Total Task Budget \$\$ Amount (required)
<div>Select... </div>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<div> Insert item</div>			

Use the table below to add your Resources and Rates

In Tenrox, rates are assigned to a resource. If a resource will bill at one rate, enter that resource only once below, with the hourly rate. If a resource completes different tasks at different rates, you must enter a line for each different rate for that resource/task combination.

*click 'Insert Item' to add more rows



Resource	Hourly Client Rate for this Resource	Named Task from above for this resource/rate, or 'All Tasks'
<input type="text"/>	<div> <input type="text"/></div>	<input type="text"/>
<div> Insert item</div>		

List any Subcontractors Names and Rates Below

Subcontractor Resource Name	Project Client Rate	Subcontractor Cost
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

List any Special Instructions Below

Accounting Information

License Billing Setup in GP	<input type="checkbox"/>	Monthly Billing Start Date	<div><input type="text"/> </div>
Client Invoiced for Project Setup	<input type="checkbox"/>	Monthly Billing End Date	<div><input type="text"/> </div>

REQUESTING A NEW PROJECT

Once the project has been added to BNext, you will receive an email confirming it is done and providing the project code



Hello,

Your project for Battleface, Inc named "D365 Business Central Implementation" has been created in Upland PSA. Your project number is BAT02001: D365 Business Central Implementation. Your next step is to schedule your resources. Remember to notify your project team to use the appropriate Project Number and Task Code. (You can forward this email).

For any resource scheduling, please reach out to Paula Scott.

****Do not reply to this email****

Proper project setup is extremely important

- Any questions/comments/concerns re: the project setup, please bring up with Taylor Doucette / Account Dept
- Our default billing schedule is Weekly invoices
 - *If a client wants bi-weekly or monthly, please notify Accounting/note on project request form*
- Any changes to project setup or billing requirements need to be provided to Account as soon as the client notifies us