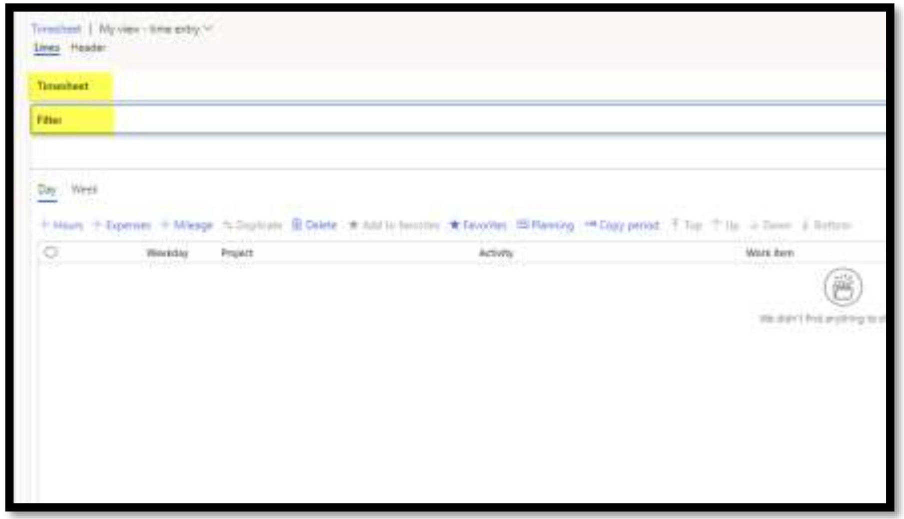
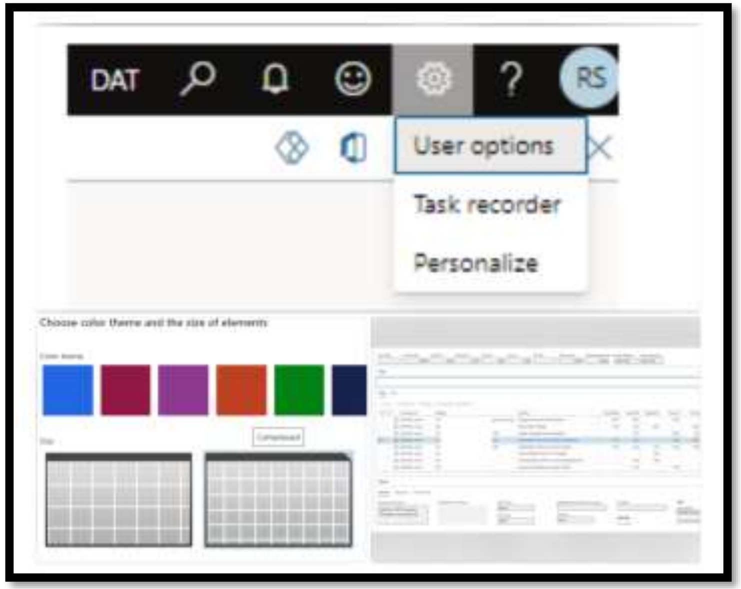
TIPS FOR A BETTER EXPERIENCE

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.

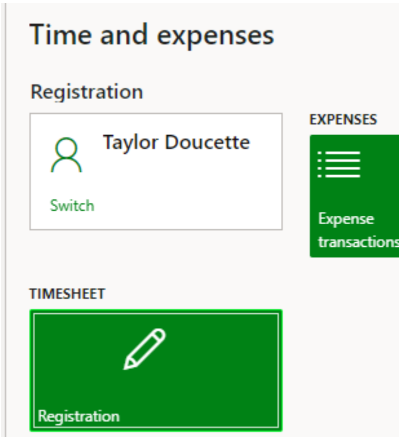
- Select User Options from Settings on the Nav Bar
- Select Preferences and the Compressed Option
- You can now see your entire timesheet in one screen - With Totals and Details / Comments!



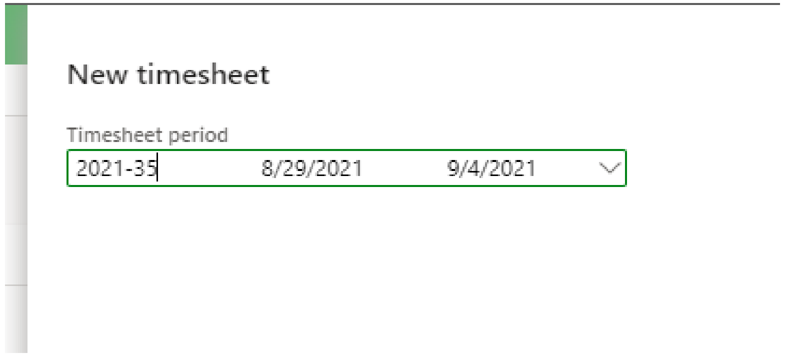
3. Right-click on columns to hide them, or drag them over to move them. Save your views.

SUBMITTING TIME

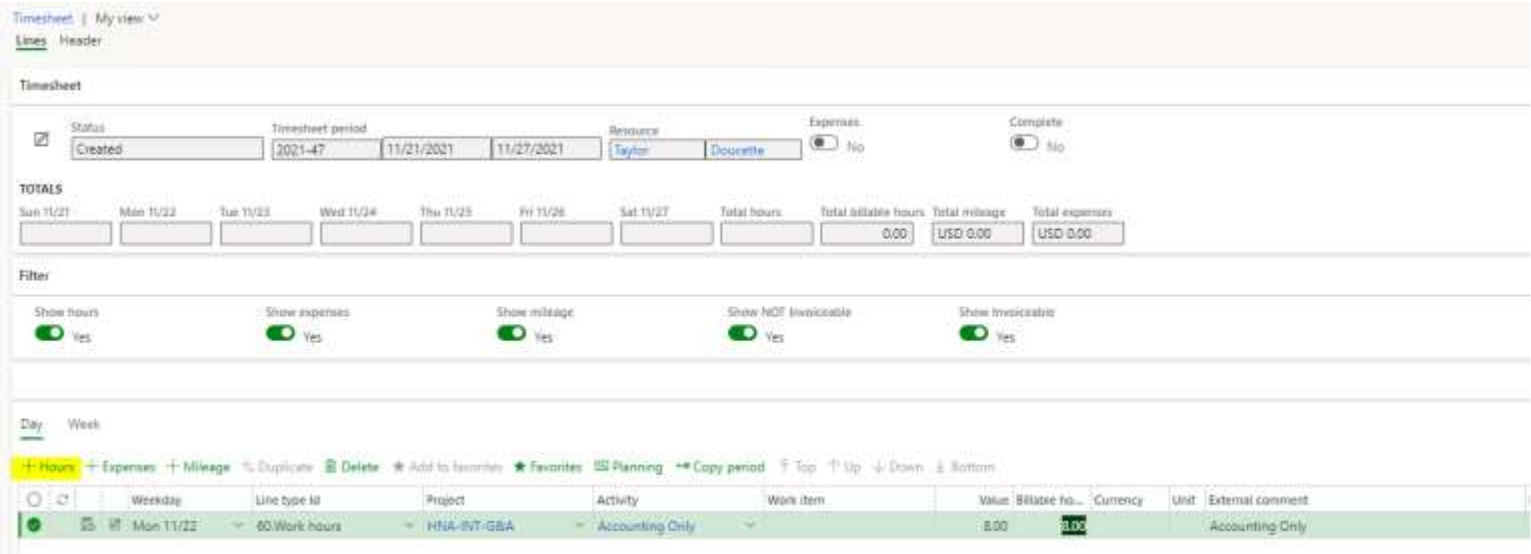
1. Under Time & Expenses, choose Registration



2. Choose the correct timeframe

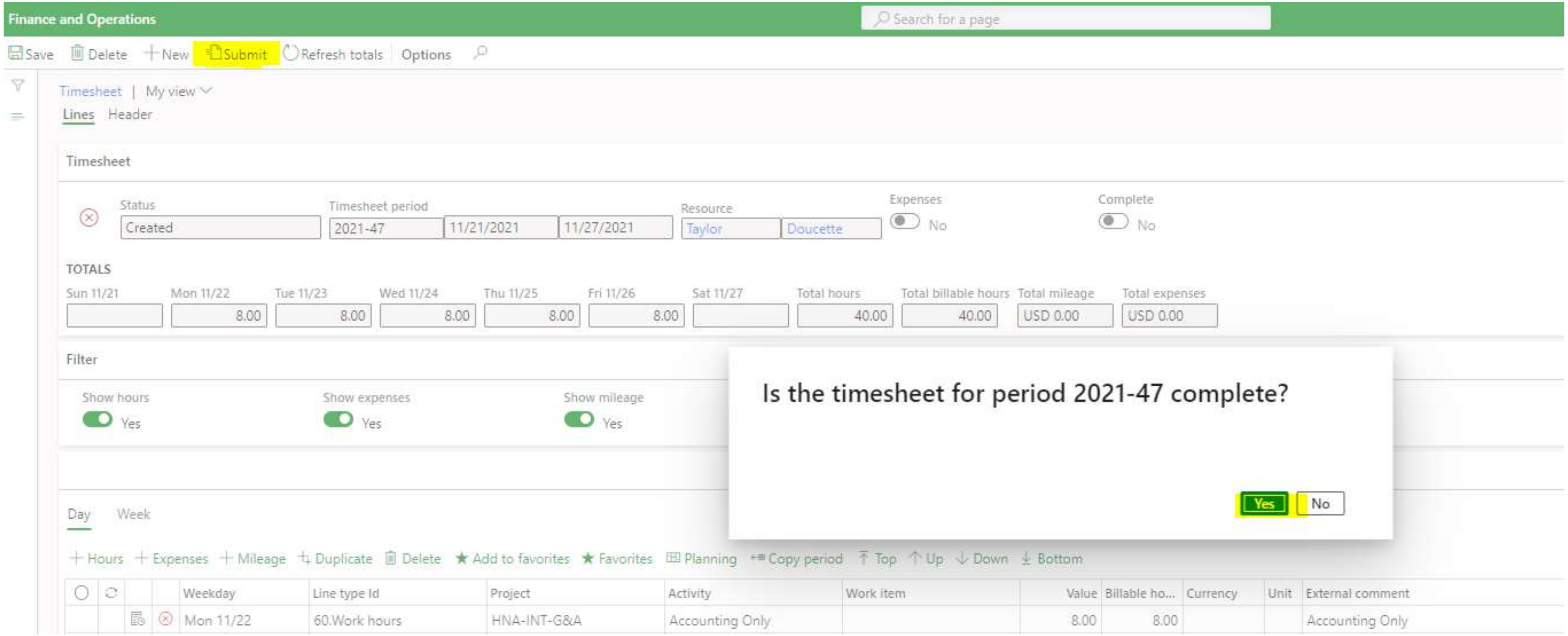


3. Start entering time by clicking + Hours midway down the screen



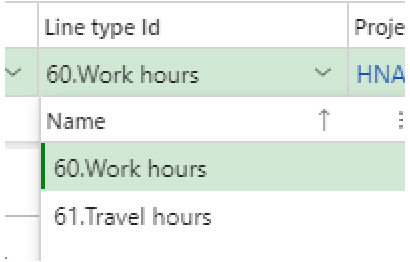
SUBMITTING TIME

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



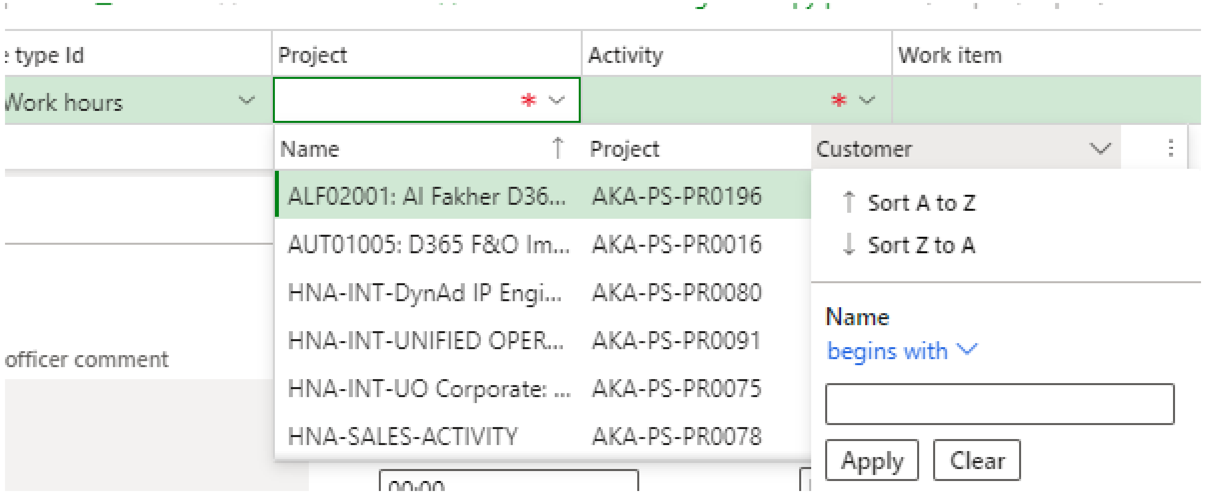
SUBMITTING TIME – NOTES & TRICKS

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**



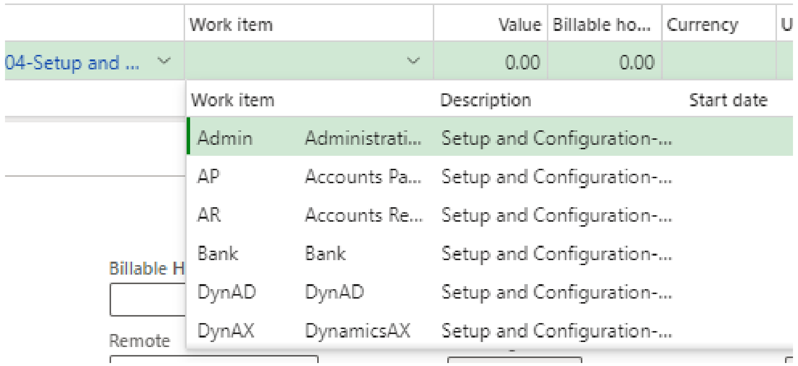
The Project and Activity fields are specific to the projects you have access to

- 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

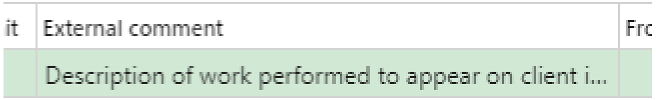


SUBMITTING TIME – NOTES & TRICKS

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



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

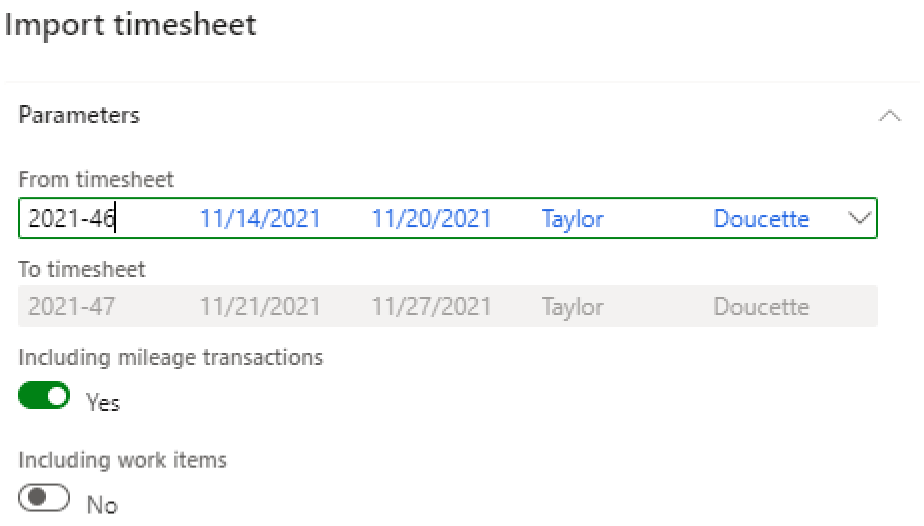


SUBMITTING TIME – NOTES & TRICKS

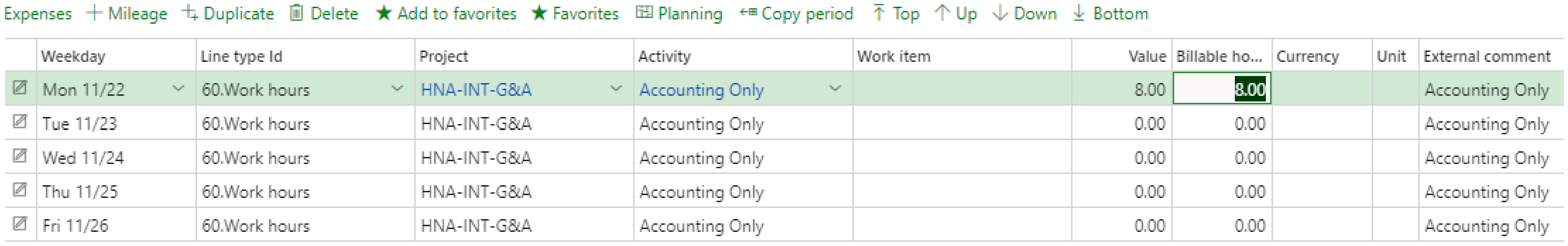
You can copy previous timesheets to save time, if your week-to-week timesheet is the same/similar

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



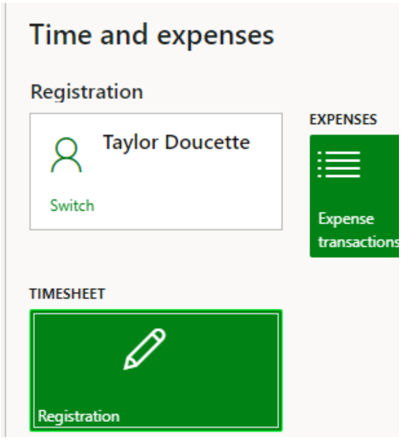
3. The timesheet will populate, and you will just need to add the Value filed for hours worked and make any other adjustments if projects/activities need to be changed



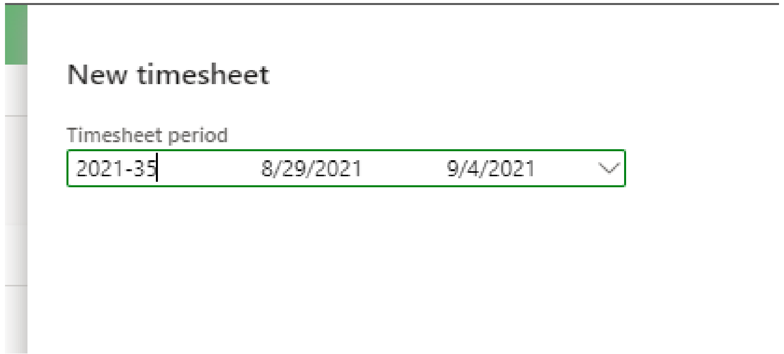
Weekday	Line type Id	Project	Activity	Work item	Value	Billable ho...	Currency	Unit	External comment
Mon 11/22	60.Work hours	HNA-INT-G&A	Accounting Only		8.00	8.00			Accounting Only
Tue 11/23	60.Work hours	HNA-INT-G&A	Accounting Only		0.00	0.00			Accounting Only
Wed 11/24	60.Work hours	HNA-INT-G&A	Accounting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



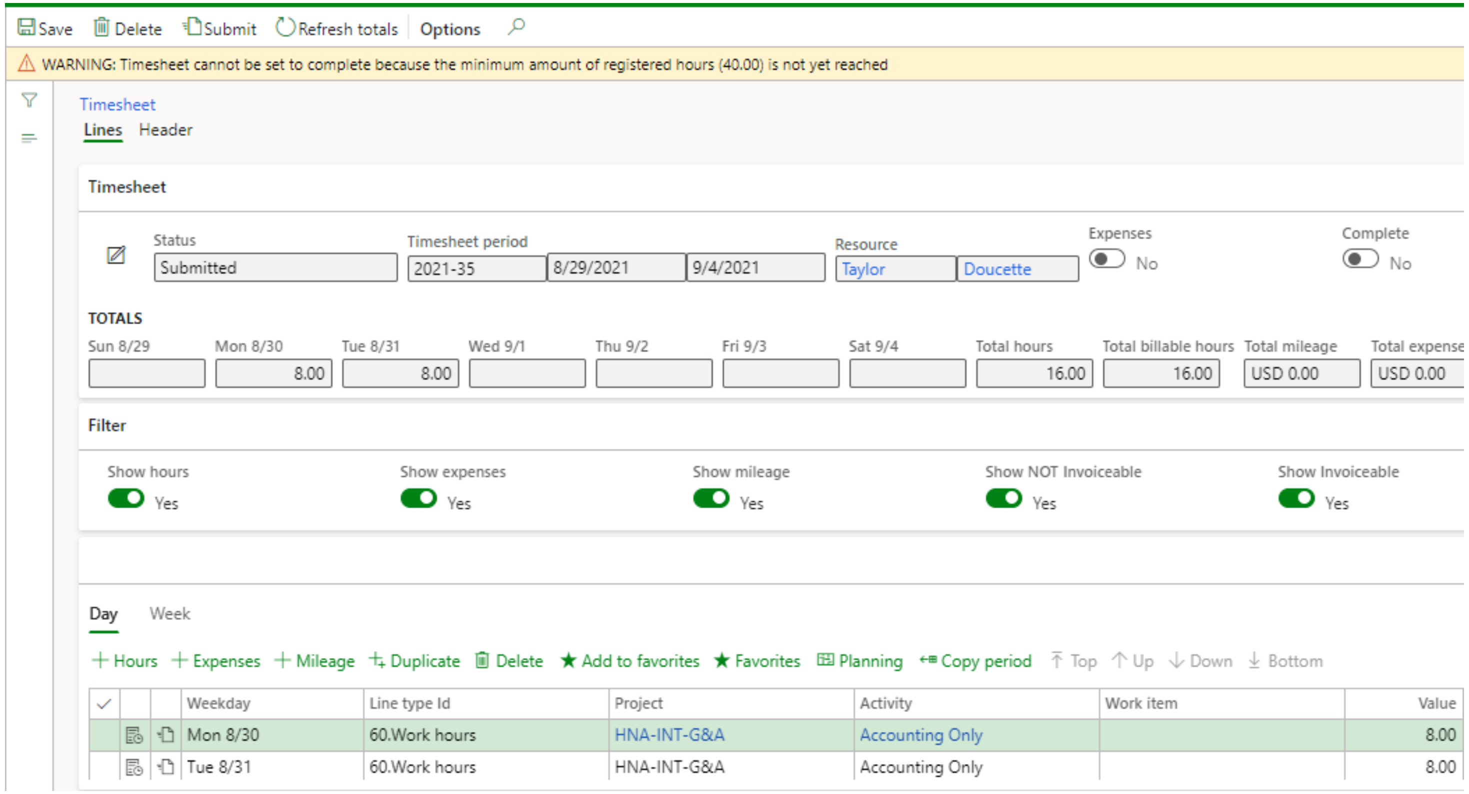
2. Choose the correct timeframe



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*

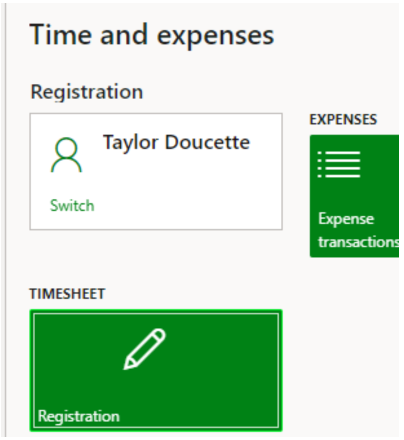


- *Please note, the status of the entire timesheet may read Created or Submitted after this operation*

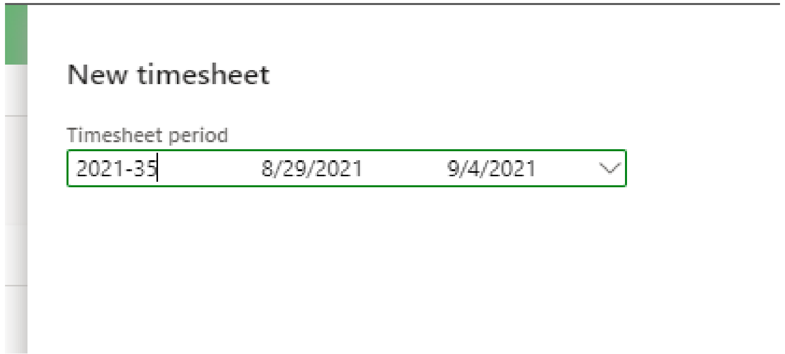
- *If you want to double check the individual entries, you can hover over the icon before the date and see the status of the individual entry*

SUBMITTING EXPENSES

1. Under Time & Expenses, choose Registration

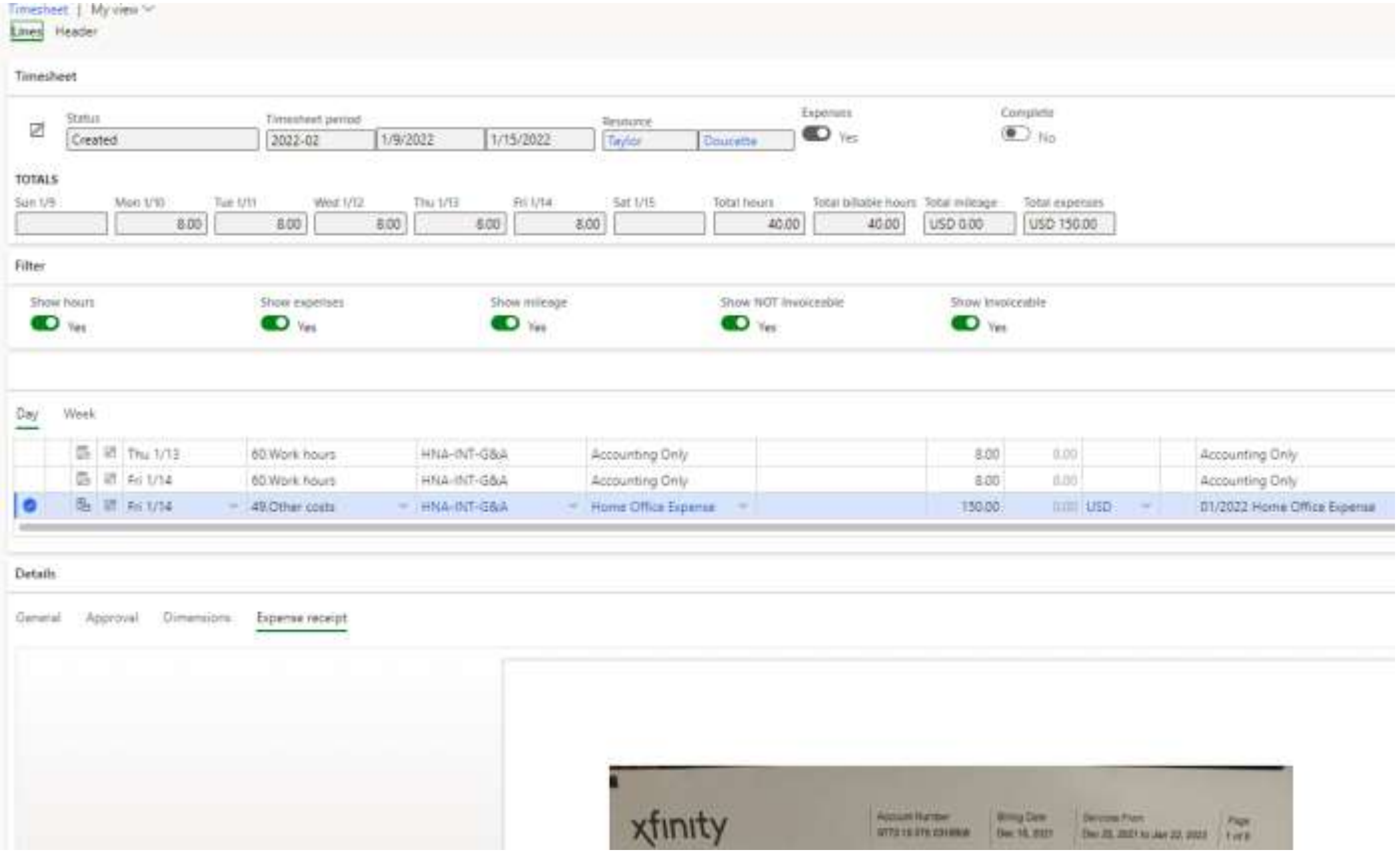


2. Choose the correct timeframe



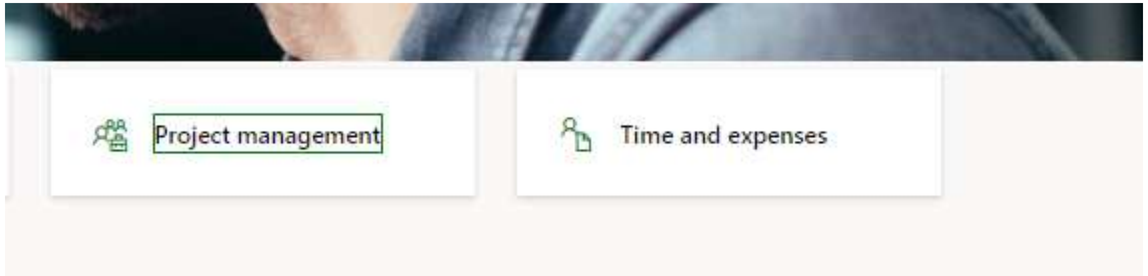
3. Expenses should be submitted on a weekly basis within your regular timesheet

- 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

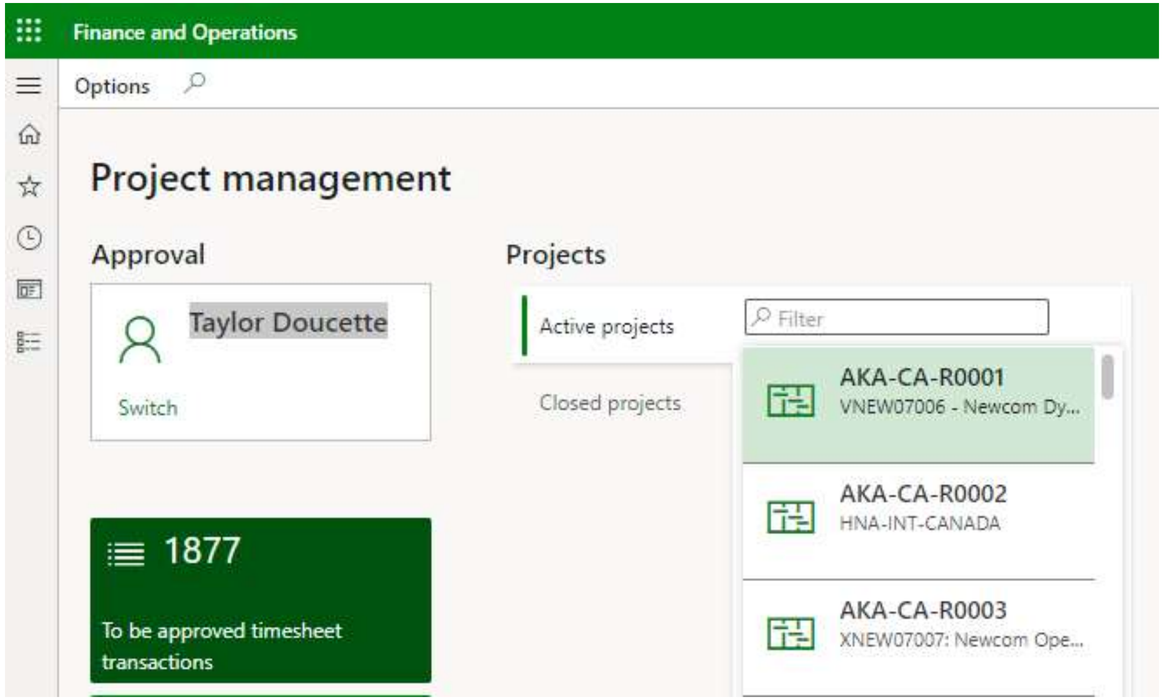


APPROVING TIME

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

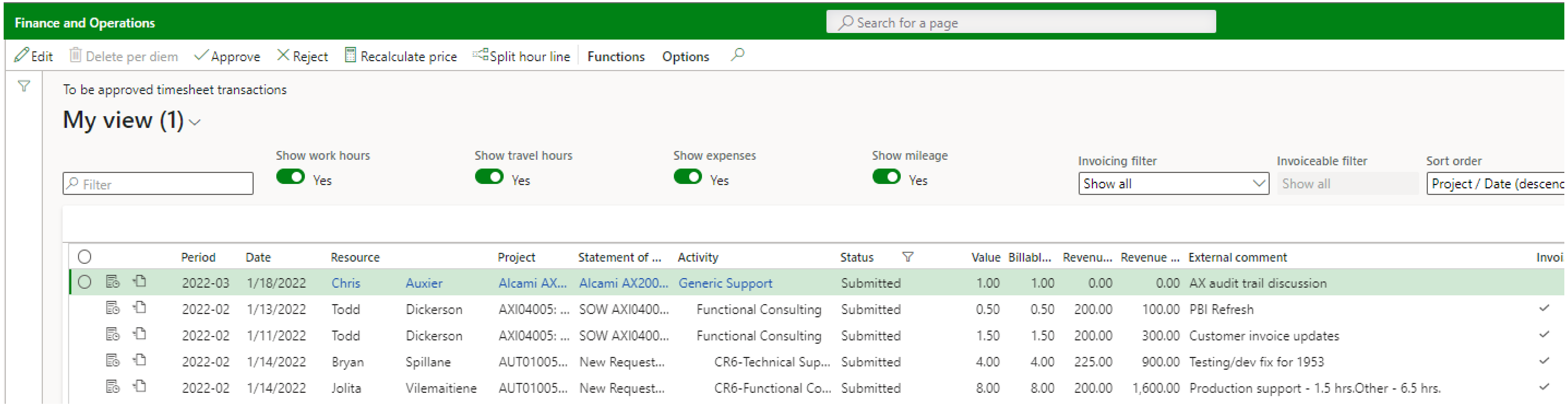


2. Select To Be Approved Timesheet Transactions – This will show you a list of all timesheets assigned to you for approval



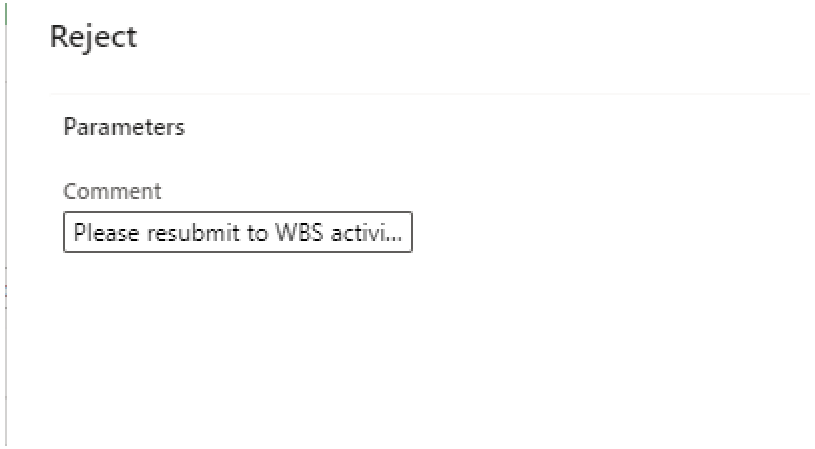
APPROVING TIME - CONTINUED

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



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 – 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

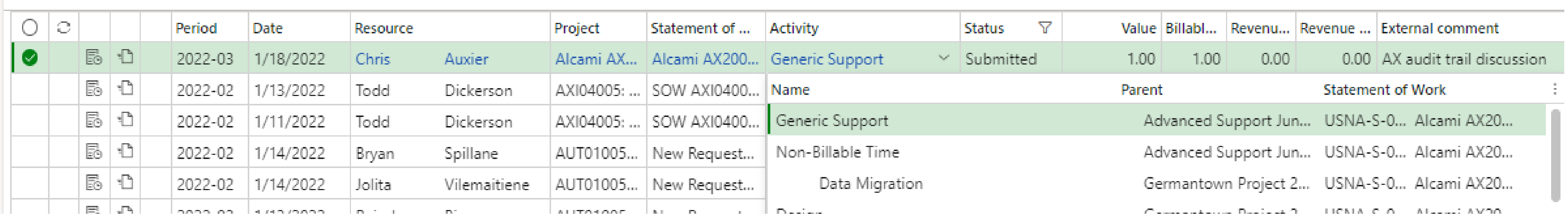
4. You can select individual lines or multiple lines by clicking the O at the left of the entry to make the process faster

- 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

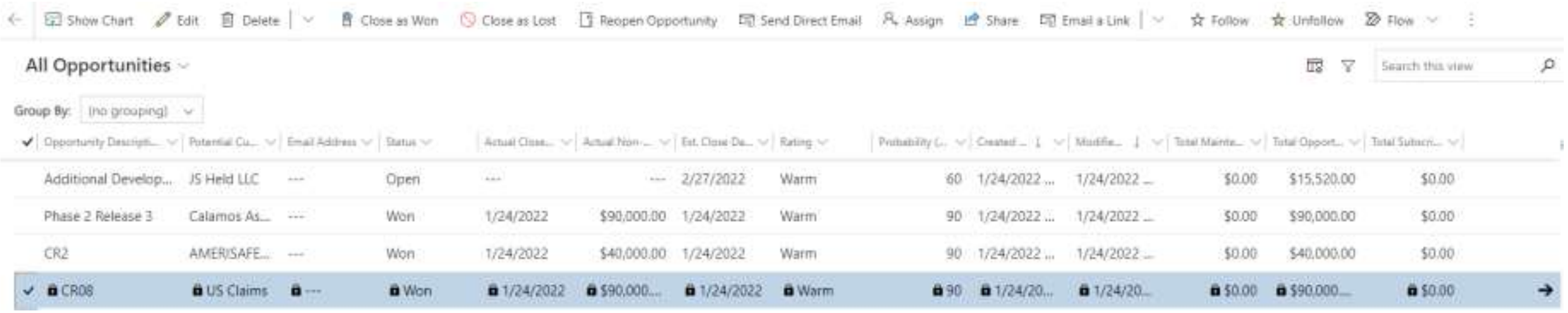
If an entry is in the right project but an incorrect WBS item, you can adjust before approving instead of having to reject the entry

- 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



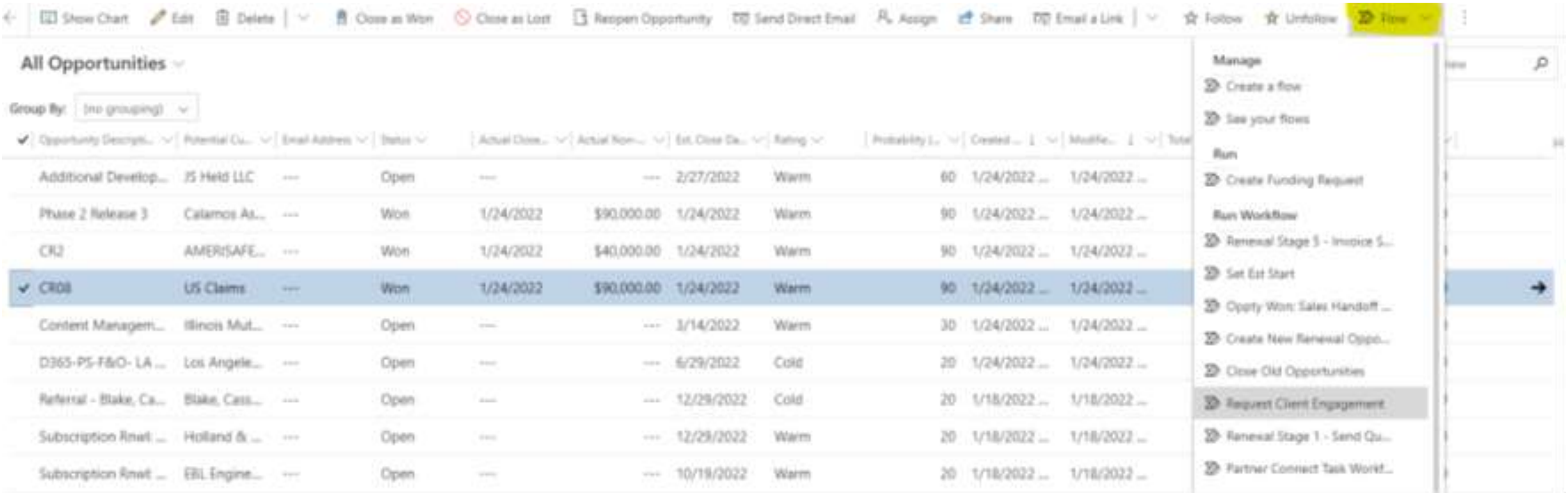
REQUESTING A PRE-SALES PROJECT

Find and select the Opportunity in CRM



Select FLOW and Request Client Engagement

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



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 from 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		*Check box for a New Client*	☐
*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.*		*Click here to insert a hyperlink* *Click here to attach a file*	
AKA Sales Person		*Check for Partner Services*	☐
AKA Project Manager		*Check box for an Azure Project*	☐
Client PO #		*Check box for a GSA Project*	☐
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.	Select... *	Click here to attach a file Click here to attach a file Click here to attach a file	

Project Information

Project Name	*	Project Start Date	
Product Line	Select... *	Projected Live Date	
Vertical	Select... *	How will the client be invoiced?	Select...
Client Project Manager		*Check if you require a Team Collaboration Site*	☐
Invoice Contact Name	*	*Invoice Contact Email*	*
Accounting Contact Name		*Accounting Contact Email*	
Specify Travel Time	Must Choose...	*Describe Special Travel Time Arrangements*	

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)
Select...			

Insert item

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'

Insert item

List any Subcontractors Names and Rates Below

Subcontractor Resource Name	Project Client Rate	Subcontractor Cost

List any Special Instructions Below

Accounting Information

License Billing Setup in GP	☐	*Monthly Billing Start Date*	
Client Invoiced for Project Setup	☐	*Monthly Billing End Date*	

REQUESTING A NEW PROJECT

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

Your Project is Ready in Upland PSA

HU

HSO United States Home <no-reply@sharepoi

To Steve Herbst

Cc Scot Bobo; Jackie Buccieri; Taylor Doucette

9/8/20

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