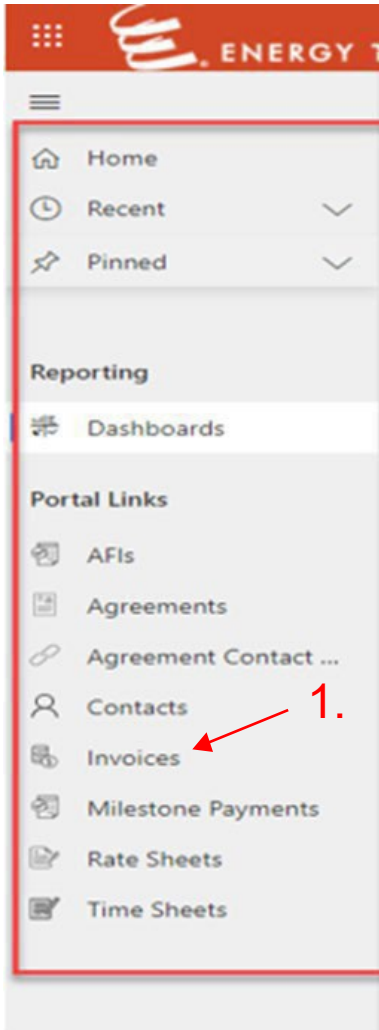# 2025 Apttus Onboarding Employees and Time Sheet Entry

ENERGY TRANSFER

Identifying Invoice to Enter Details

1. From the navigation toolbar select invoices. Selecting invoices generates a list of all the invoices currently in Apttus.
2. Under the "match status" column, locate invoices that read as not matched and reference T&M in the agreement price structure column.
   - ➢ Not matched – Invoice is awaiting vendor to enter details and submit for PM approval.
3. Double click on the invoice amount.

1. Click "download invoice"
2. Click on the "work offer" hyperlink
3. Always select "discard changes"

Downloading Invoice

Employee Onboarding Details

Per each work offer, vendor employee names must be added into Apttus prior to transcribing the invoice details into the time-sheet area.

1. Select employee onboarding for time entry
   - ✓ If employee name(s) are listed, no actions are needed.
   - ✓ If the employees' names are not displayed see next steps.
2. Select + new agreement onboarding

Selecting Job Classification

1. Click on the magnifying glass under job classification. A list of rates will populate.

   - Be sure to select the rate/job classification that aligns with the billed rate on your invoice.

   - If you do not see the classification rate scroll to the bottom of the list or select advanced

   - If the rate you are looking for is not listed, reach out to your assigned Doc Control Analyst.

Adding Vendor Employee

If the employee bills multiple job classifications, the employee should be can be onboarded more than once.

1. Click on the magnifying glass under vendor employee
2. Select + New Contact at the bottom

1. All fields with an asterisk * are required

   * First Name

   * Last Name

   * Birthday

   * Company Name

2. Click Screen will re-direct back on-boarding screen and employee's name will be visible

Employee onboarding verification

- Once the employee is on-boarded, the screen will update, and the employee's name should be visible
  - ✓ If the name is not visible, select refresh

Time Sheet Entry

ENERGY TRANSFER

Identify the invoice billing cycle

Review invoice for billing cycle dates

1. Select time sheets
2. Select + new time sheet

Enter billing cycle dates

- Apttus has a 31−day threshold for each timesheet billing cycle.

  ➢ There is a hard stop in Apttus for any billing cycle the exceeds the 31 – day threshold.
  ➢ There is no work around to this hard stop.
  ➢ If you encounter an error message, you must revise the invoice and split the invoice into multiple invoices to accommodate the 31 - day threshold

2. Select save

1. Enter invoice billing cycle start and end dates

Adding Invoice Number To Time Sheet

1. Select time sheet
2. Select the drop down, top right
3. Enter invoice number
4. Select save

Transcribing billing details into time sheet

1. Click on timesheet entries
   - Two-line items generate for each employee (standard & mileage)

Time Sheet #10 for 112138608 - Saved
Time Sheet

Time Sheet | **Time Sheet Entries** | Approval Requests | Supporting Documents | Pro-Forma Invoices | Related

1. Click on time sheet entries
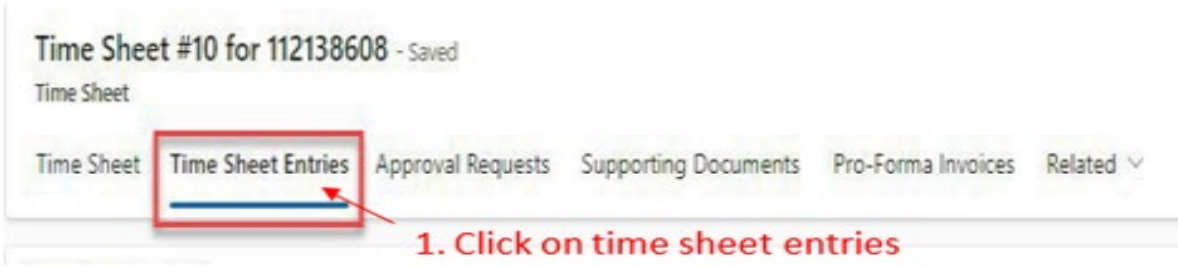
2. Enter state & county
3. Per diem total dollar amount billed for each employee (if applicable)
4. Enter hours worked per each date. If day rate is billed, change type 1 standard to day
5. Save changes

New Time Sheet Grid

Time Sheet Filter — Active

5. Save changes

2. Enter state & county
3. Per diem (if applicable)
4. Hours worked by employee on each date

	Contractor/Classification	Type1	Unit	State	County	Perdiem A...	Sat, Aug 15	Sun, Aug 16	Line Total	Comments
🔍 ✕	Olivia Smith / Drafting Services - Administrative	Standard	Hour	Texas	Harris	$200.00	8.00	8.00	16.00	
🔍 ✕	Olivia Smith / Drafting Services - Administrative	Mileage	Mileage	Texas	Harris		120.00	120.00	240.00	

6. Select save then update

← | | | **Update** | **Save** | Save & Close | X-AUTHOR | Delete | Help Request

6. Click on save & update

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Adding additional line (overtime, weekend, etc.) as needed

➢ To add additional billed hours such as overtime, weekend, holiday, etc., see steps below.

1. Click on + add new record
2. New record field will populate, begin typing employee's name. Employee's name and classification will auto- populate
3. Select the "type 1" field and select "overtime" and select the "unit" field and select "hour" and enter overtime hours worked.

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Non-Labor Items

Non-Labor Details

Items such as the below are non labor items
- Equipment
- Materials
- Subcontractor
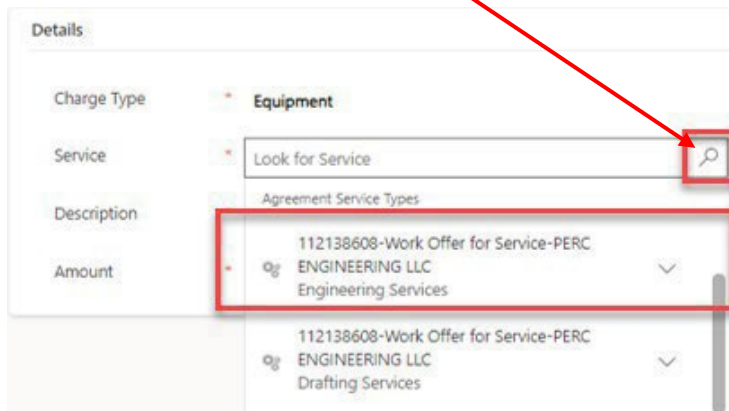- Other Billables

1. Select time sheet
2. Select + new non labor charge
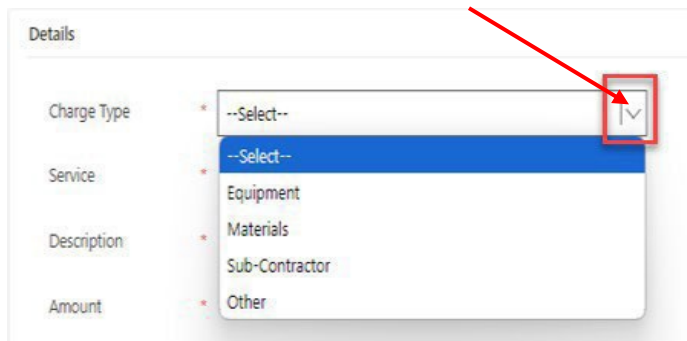
Non-Labor Details

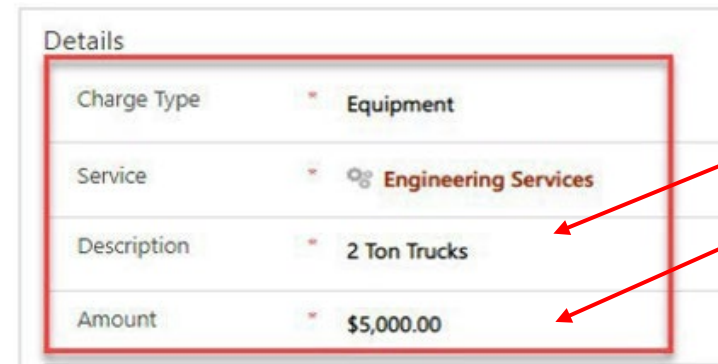1. Click the charge type drop down and select the charge type that matches invoice billing

2. Click the service drop down and select the service that is billing on the invoice
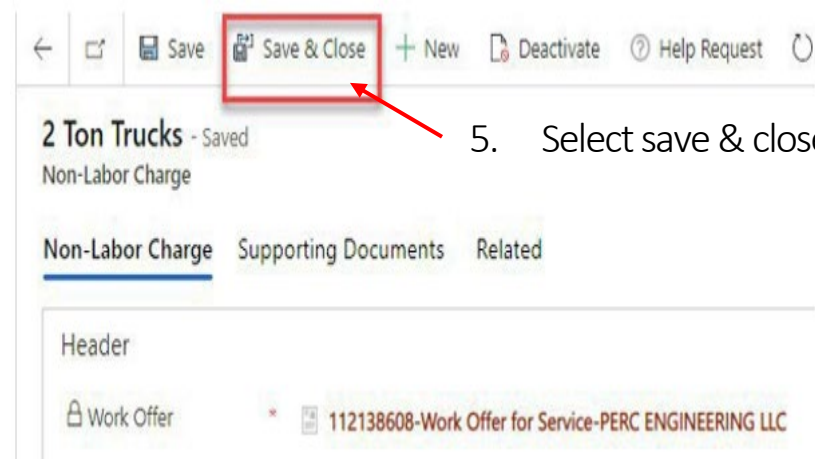
3. Click in the description area and enter details

4. Enter total amount billed for charge type

5. Select save & close

Non-Labor Subcontractor billables

Non-Labor charge type subcontractor, meaning any third-party contractor assisting the vendor to complete project work.

- In the example on the next (2) slides, the direct contractor is Groundwater and Environmental, the subcontractor is Lewis Environmental Inc., and a copy of the subcontractor's invoice must be provided.

- In the subcontract name field, the vendor's name who performed the work (in this case Lewis Environmental) has been entered

Non-Labor Subcontractor billables

The agreement is under Groundwater and Environmental, the cost of the invoice includes separate invoices from Lewis Environmental Inc.

Non-Labor Subcontractor billables

1. When selecting "charge type" subcontractor, an additional box populates.
2. In the subcontract name, enter the subcontractor who performed the services

MANDATORY
Always upload a copy of your invoice under the supporting document area

1. Click supporting documents
2. Click the paperclip to the far right and upload the invoice
3. Invoice copy will appear far left
4. Click add note and close

Verification of time sheet totals

Work offers created <u>prior</u> to January 9, 2023 – Apttus does not provide a timesheet subtotal until the PM has approved the timesheet.

1. Compare the total time, days, mileage and non- labor against the totals within your invoice to ensure all details have been transcribed.
2. If timesheet totals match invoice totals, submit for approval.

x   If the totals <u>do not match</u>, review the invoice data transcribed, and make corrections.

Verification of time sheet totals

Work offers created after January 9, 2023, generate a "timesheet value this period" field.

Invoice total and timesheet value this period totals must match.

1. Select timesheet line items
2. Select update line items total. The below box will remain on the screen until the calculations are completed.

Timesheet Line Items update request initiated. Page will refresh automatically after some time.

3. System calculates all the data entered and generates a total. If invoice and timesheet value this period totals match
4. Submit for approval

x If the totals do not match, review the invoice data transcribed, and make corrections.

On hold time sheet status?

After selecting submit for approval, if the time sheet populates on hold, this means a change order is required.

1. Send an email to the ET Project Manager and Cost Analyst assigned to the work offer advising a change order is needed.

Once the change order is executed, the time sheet will update to reflect pending approval.

Vendor Immediate Action Items

- Continue emailing invoices to APInvoicesETP.Mailbox@energytransfer.com

- Log into Apttus

- Search invoices and identify any unmatched invoices

  - Remember, your assigned Doc Control Analyst will no longer enter invoice details so its imperative vendors begin submitting invoice details as soon as possible so payments can be issued.

- Begin entering invoice details into Apttus and submit for ETP PM approval.

  - Refer to the training guide when questions arise as it pertains to the steps for entering details.

  - If issue cannot be resolved after reviewing the training guide, reach out to the appropriate person(s) or department for assistance.