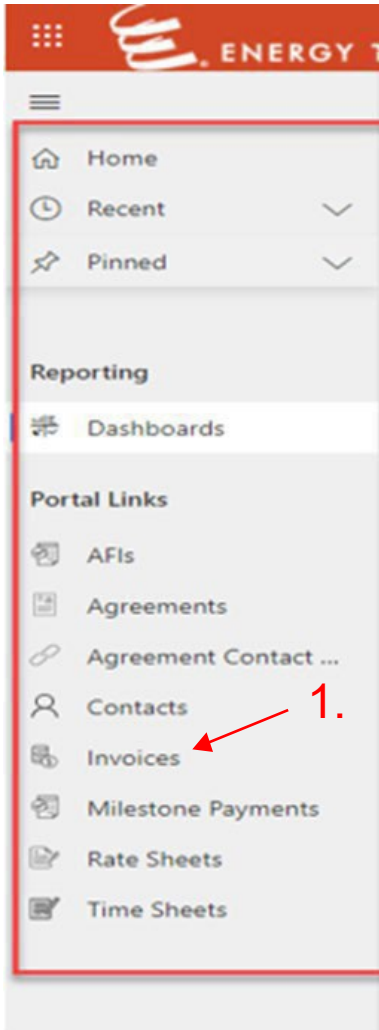


2025 Apttus Onboarding Employees and Time Sheet Entry

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.



All Vendor Invoices* Edit col

<input type="checkbox"/>	SAP Do... ▾	Creat... ▾ ▾	Vendor ▴ ▾	PO Number ▾	Work Offer ▾	Subtotal Amount ▾	Total Invoice Amount ▾	Agreement Price Structure ... ▾	Match Status ▾
<input type="checkbox"/>	6/11/2025	6/17/202...		101207758	101207758-Work Offer for Service...	\$6,059.08	\$6,059.08	T&M	Not Matched
<input type="checkbox"/>	6/11/2025	6/17/202...		112188626	112188626-Work Offer for Service...	\$3,861.25	\$3,861.25	T&M	Not Matched

3. Double click on the invoice amount

2.

Downloading Invoice

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

The screenshot shows the SAP 'Vendor Invoice for 40057' interface. The top toolbar contains buttons for 'REPROCESS INVOICE', 'Save', 'Save & Close', 'New', 'Help Request', 'Download Invoice' (highlighted with a red box and arrow labeled '1.'), 'Refresh', 'Check Access', and 'Run Report'. Below the toolbar, the 'Header' tab is selected, showing fields for 'Invoice Type' (Vendor), 'Marked From SAP' (ETC), 'Invoice Due Date' (10/13/2023), 'Vendor' (PERC ENGINEERING LLC), 'Work Offer' (112167265-Work Offer for Service-P... highlighted with a red box and arrow labeled '2.'), 'PO Number' (112167265), 'AFE' (C-22176-PP-20140001), 'Cost Center' (---), and 'Requires Doc Control Review' (No). To the right, the 'SAP Information' section shows 'SAP Document Number' (000005450175), 'SAP Invoice Number' (---), 'SAP Posting Date' (---), and 'SAP Transaction Type' (Invoice). At the bottom, an 'Unsaved changes' dialog box is open, asking 'Do you want to save your changes before leaving this page?'. It has two buttons: 'Save and continue' and 'Discard changes' (highlighted with a red box and arrow labeled '3.').

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

The screenshot displays the Apttus software interface for a 'Work Offer for Service-CORRPRO CO INC' record. The top navigation bar includes buttons for Save, Save & Close, Update Agreement, CTV Report, CTV Report All, Deactivate, Delete, Help Request, Refresh, Check Access, Process, View Hierarchy, and a search icon. Below this, the record title '101104436-Work Offer for Service-CORRPRO CO INC - Saved' is shown, along with a 'Work Offer for Service' record type link. The main content area features a tabbed interface with 'General' selected. The 'Employee Onboarding for Time Entry' tab is highlighted with a red box and an arrow pointing to it, with the instruction '1. Click on employee for time entry' below. To the right, the '+ New Agreement Onbo...' button is also highlighted with a red box and an arrow, with the instruction '2. Select + new agreement onboarding' below. The bottom of the screen shows a table with columns for Job Classification, Vendor Employee, Has Completed Safety Training, and Created On.

2. Select + new agreement onboarding

Selecting Job Classification

New Agreement Onboarding Request

General

Agreement * 112138608-Work Offer for Service-PERC ENGINEERING LLC

Job Classification * Look for Job Classification

Vendor Employee *

Has Completed Safety Training

Rate Sheet Lines

Drafting Services - Administrative	\$65.00
Drafting Services - CAD Designer	\$110.00
Drafting Services - CAD Operator 1	\$100.00
Drafting Services - CAD Operator 2	\$100.00

Advanced lookup

1.

Scroll bar

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

New Agreement Onboarding Request - Unsaved

General

The screenshot shows a web form titled "New Agreement Onboarding Request - Unsaved". Under the "General" tab, there are four fields: "Agreement" (101104436-Work Offer for Service-CORRPRO CO INC), "Job Classification" (Contract Labor - Field Maintenance - Construction Foreman), "Vendor Employee" (Look for Vendor Employee), and "Has Completed Safety Training". The "Vendor Employee" field has a dropdown menu open showing a list of contacts: Aaron Donato, Aaron Morris, Adolfo Long, Adrian hernandez, and Alan Houle Jr. At the bottom of the dropdown is a button labeled "+ New Contact". A red box and arrow labeled "1." point to the magnifying glass icon in the "Vendor Employee" field. Another red box and arrow labeled "2." point to the "+ New Contact" button. The text "Advanced lookup" is visible at the bottom right of the dropdown menu.

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

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

Adding Employee Details

Details

↑ Scan Business Card

First Name *	Olivia
Last Name *	Smith
Birthday *	7/16/1996
Job Title	Foreman
Company Name *	FIS OPERATIONS LLC

Save and Close Cancel

1. All fields with an asterisk * are required
 - * First Name
 - * Last Name
 - * Birthday
 - * Company Name
2. Click **Save and Close** 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

Save Save & Close Deactivate Help Request Refresh Process View Hierarchy Email a Link Run Report

112126163-Work Offer for Service-1418 E FAYETTE LLC Agreement

General Employee Onboarding for Time En... Time Sheets Agreement Checklist Child Agreements Audit History Vendor Pre-Qualification Vendor Documents Related

✓ Job Classification	Vendor Employee	Has Completed Safety Training	Created On
Contract Labor - Maint. I/R Construction - Consultant	Olivia Smith	No	9/1/2020 11:59 AM

Time Sheet Entry

Identify the invoice billing cycle

Review invoice for billing cycle dates

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

112185687-Work Offer for Service-AGAPITO ASSOC INC - Saved

Agreement

Work Offer for Service Record Type Approved Approval Status Activated Status

General Employee Onboarding for Time En... Time Sheets Child Agreements Audit History Vendor Pre-Qualification Vendor Documents Related ▾

1. →

2. →

+ New Time Sheet Refresh Flow ▾

Version ▴ ▾	Start Date ▾	End Date ▾	Total Time ▾	Total Days ▾	Total Mileage ▾	Total Non-Labor ▾	Approval Status ▾
1	4/2/2024	4/30/2024	140.00	0.00	0.00	\$0.00	Approved

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

The screenshot shows the 'New Time Sheet' form in Apttus. The top navigation bar includes buttons for 'Update', 'Save', 'Save & Close', 'X-AUTHOR', 'Help Request', and 'Flow'. The 'Save' button is highlighted with a red box and an arrow pointing to it, with the text '2. Select save' next to it. Below the navigation bar, the form title is 'New Time Sheet - Unsaved'. The main content area has tabs for 'Time Sheet', 'Time Sheet Entries', 'Time Sheet Line Items', 'Approval Requests', 'Supporting Documents', and 'Pro-Forma Invoices'. The 'Time Sheet' tab is selected. Under the 'Header Details' section, there are two rows of data: 'Vendor' with 'AGAPITO ASSOC INC' and 'Work Offer' with '112185687-Work Offer for Servic...'. To the right of these rows, there are two date fields: 'Start Date' with '4/1/2024' and 'End Date' with '4/25/2024'. These date fields are enclosed in a red box, and an arrow points to the 'End Date' field with the text '1. Enter invoice billing cycle start and end dates'.

1. Enter invoice billing cycle start and end dates

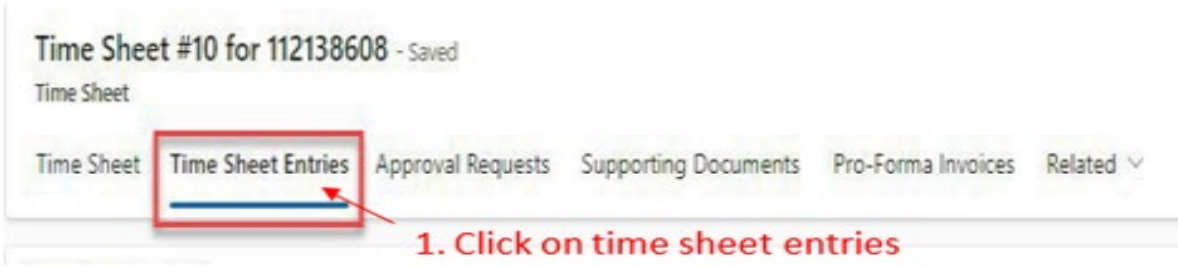
Adding Invoice Number To Time Sheet

The screenshot shows the 'New Time Sheet' interface. At the top, there are buttons for 'Update', 'Save', and 'Save & Close'. Below these is a tabbed interface with 'Time Sheet', 'Time Sheet Entries', and 'Time Sheet Line Items'. The 'Time Sheet' tab is selected. Below the tabs is a 'Header Details' section with fields for 'Vendor' (set to 'UNIVERSAL PROTECTIO...'), 'Start Date', 'Work Offer' (set to '101195057-Work Offer for Servi...'), and 'End Date'. To the right, a 'Vendor Invoice' form is open, showing fields for 'Vendor Invoice' (12345), 'Version' (3), and 'Approval Status'. A red box highlights the 'Save' button in the top bar, with a red arrow pointing to it labeled '4.'. Another red box highlights the 'Time Sheet' tab, with a red arrow pointing to it labeled '1.'. A third red box highlights the 'Vendor Invoice' input field containing '12345', with a red arrow pointing to it labeled '3.'. A fourth red box highlights a dropdown arrow in the top right corner of the 'Vendor Invoice' form, with a red arrow pointing to it labeled '2.'. The dropdown arrow is a small square button with an upward-pointing chevron.

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)



- 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



- 6. Select save then update



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

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

Time Sheet #10 for 112138608 - Saved

Time Sheet

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

New Time Sheet Grid

Time Sheet Filter

+ Add new record ✓ Save changes ⌂ Cancel changes ⌂ Activate ⌂ Deactivate

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

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.

Non-Labor Items



ENERGY
TRANSFER

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

Time Sheet #10 for 112138608 - Saved

Time Sheet

Vendor Invoice: 10 Approval Status

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

Header Details

1. Select time sheet

Vendor * PERC ENGINEERING LLC Start Date * 8/15/2020

Work Order * 112138608-Work Order for Servic... End Date * 8/16/2020

Time Sheet Totals

Non-Labor Charges

2. Select + new non – labor charge

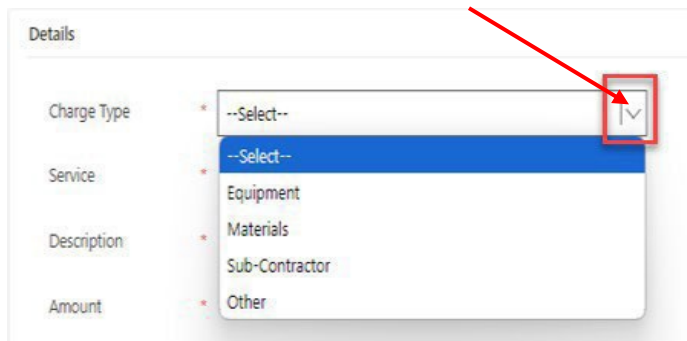
+ New Non-Labor Charge

Charge Ty... Service Description * Amount

No data available

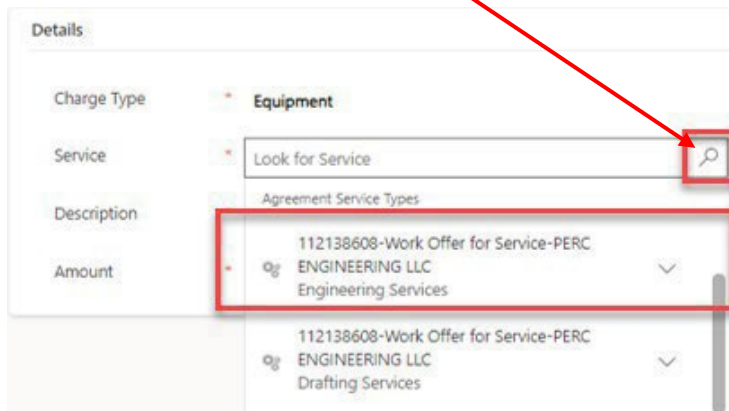
Non-Labor Details

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

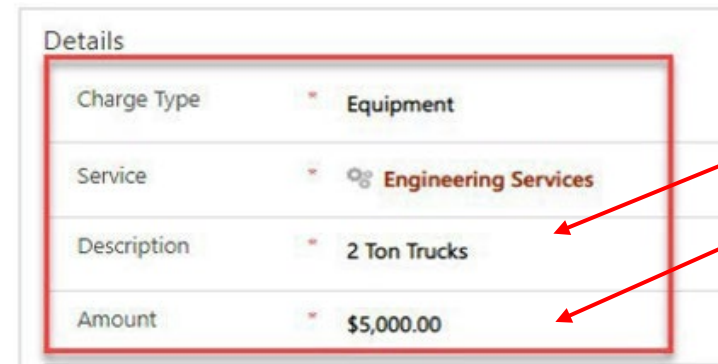


The screenshot shows the 'Details' form with the 'Charge Type' dropdown menu open. The menu options are: --Select--, Equipment, Materials, Sub-Contractor, and Other. A red box highlights the dropdown arrow, and a red arrow points to it from the instruction.

2. Click the service drop down and select the service that is billing on the invoice

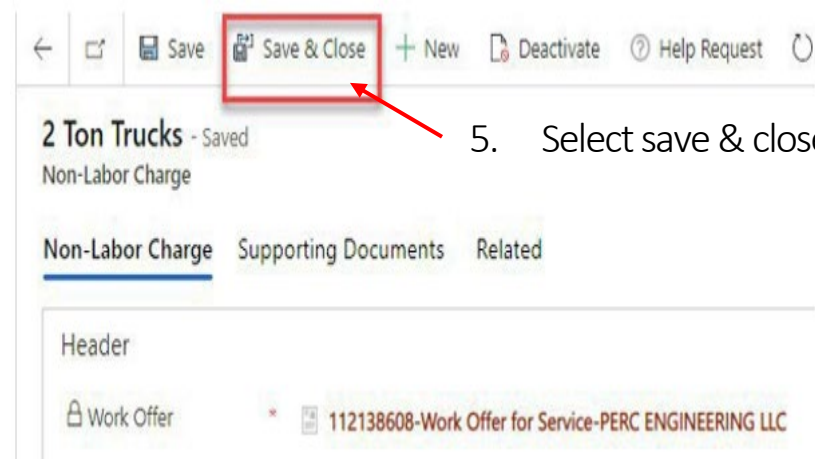


The screenshot shows the 'Details' form with the 'Service' dropdown menu open. The menu options are: Look for Service, Agreement Service Types, 112138608-Work Offer for Service-PERC ENGINEERING LLC, and 112138608-Work Offer for Service-PERC ENGINEERING LLC Drafting Services. A red box highlights the dropdown arrow, and a red arrow points to it from the instruction.



The screenshot shows the 'Details' form with the 'Description' field set to '2 Ton Trucks' and the 'Amount' field set to '\$5,000.00'. A red box highlights the 'Description' and 'Amount' fields, and a red arrow points to it from the instruction.

3. Click in the description area and enter details
4. Enter total amount billed for charge type



The screenshot shows the 'Non-Labor Charge' form with the 'Save & Close' button highlighted. A red box highlights the 'Save & Close' button, and a red arrow points to it from the instruction.

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.

TIME SHEET
Time Sheet #12 for 131126802

Version: 12 | Approval Status: Pending Approval | Owner: Pauline Sebastian

Time Sheet

Header Details

Vendor: GROUNDWATER & ENVIRONMENTAL / SVCS INC | Start Date: 10/18/2019
Work Order: 131126802-Work Order for Service-GROUNDWATER | End Date: 11/14/2019

Non-Labor Charges

Charge Type	Service	Description	Amount
Equipment	Environmental Services	4 Wheel Drive Vehicle - HR - 6 units	\$144.00
Equipment	Environmental Services	4 Wheel Drive Vehicle - DY - 3.5 units	\$577.50
Sub-Contract	Environmental Services	48351	\$11,790.35
Sub-Contract	Environmental Services	48352	\$12,129.43
Sub-Contract	Environmental Services	48353	\$15,133.25
Sub-Contract	Environmental Services	48499	\$102,487.37
Sub-Contract	Environmental Services	48627	\$118,910.76
Sub-Contract	Environmental Services	48628	\$123,721.91
Sub-Contract	Environmental Services	48629	\$63,959.48
Sub-Contract	Environmental Services	48630	\$11,715.00

1 - 10 of 18 | Page 1

Modified On: 1/6/2020 3:15 PM | Modified By: aptus Service

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lewis LEWIS ENVIRONMENTAL INCORPORATED
155 RAILROAD PLAZA
P.O. BOX 639
ROYERSFORD, PA 19468

Invoice

Invoice #: 48629
Invoice Date: 11/7/2019
Due Date: 12/7/2019
Project: 21733 - G2
P.O. Number: 1107005
Job Number: 21733
Account #:

Bill To:
GROUNDWATER & ENVIRONMENTAL SV
ACCOUNTS PAYABLE
443 CREAMERY WAY - SUITE 500
EXTON, PA 19341

Project Address:
G2S
491 LISA DRIVE
EXTON, PA

Description	Hours/Qty	Rate	U/M	Amount
HAYWARD BAKER SERVICES DATES OF SERVICE: 10/14/19 TO 10/20/19 HAYWARD BAKER INVOICE 33 DATED 10/25/19 - COST + 15% PO #: 0205136-0200-870 ORGANIZATION: 1400	1	58,144.98	LS	58,144.98

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

NON-LABOR CHARGE
48629

Non-Labor Charge

Header

Work Offer 131126802-Work Offer for Service-GROUNDWATER & ENVIRONME Time Sheet Time Sheet #12 for 131126802

Details

Charge Type	Sub-Contractor
Service	Environmental Services
Description	48629
Amount	\$63,959.48

Sub-Contract Name Lewis Environmental Inc

MANDATORY

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

Time Sheet #1 for 101207173 - Saved
Time Sheet

Time Sheet Time Sheet Entries Time Sheet Line Items Approval Requests **Supporting Documents** Pro-Forma Invoices Related ▾

Show form fill assist

Timeline

Search timeline

Enter a note..

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

Test Doc.docx X

Add note and close ▾ Cancel

Verification of time sheet totals

The screenshot displays the Apttus Time Sheet interface. At the top, a toolbar contains buttons for 'Update', 'Save', 'Save & Close', 'X-AUTHOR', 'SUBMIT FOR APPROVAL' (highlighted with a red box and labeled '2.'), 'Delete', 'Help Request', and a refresh icon. Below the toolbar, the title 'Time Sheet #2 for 101157331 - Saved' is shown, followed by a tabbed menu with 'Time Sheet' selected. The 'Header Details' section includes fields for 'Vendor' (CALVIN MAYS PETROLE...), 'Start Date' (12/13/2023), 'Work Offer' (101157331-Work Offer for Servi...), and 'End Date' (12/15/2023). The 'Time Sheet Totals' section is highlighted with a red box and labeled '1.', containing four rows of data: Total Time (19.00), Total Mileage (243.00), Total Days (0.00), and Total Non-Labor (\$7,800.00). Each row also shows the last updated timestamp as 6/19/2025 7:58 AM.

Time Sheet Totals			
Total Time	19.00	Total Mileage	243.00
Last updated:	6/19/2025 7:58 AM	Last updated:	6/19/2025 7:58 AM
Total Days	0.00	Total Non-Labor	\$7,800.00
Last updated:	6/19/2025 7:58 AM	Last updated:	6/19/2025 7:58 AM

Work offers created prior 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 **do not match**, review the invoice data transcribed, and make corrections.

Verification of time sheet totals

Time Sheet #1 for 131168806 - Saved

Time Sheet

Time Sheet Entries Time Sheet Line Items Approval Requests Supporting Documents Pro-Forma Invoices Related

Time Sheet Line Items Details

Time Sheet Line Items

Line Number GL Account Material Group Total Work Offer Timesheet Value This Period

Time Sheet Totals

Total Time	90.00	Total Mileage	0.00
Last updated:	10/23/2024 5:37 PM	Last updated:	10/23/2024 5:37 PM
Total Days	0.00	Total Non-Labor	\$2,194.50
Last updated:	10/23/2024 5:37 PM	Last updated:	10/23/2024 5:37 PM
Total Labor	\$2,970.00	Timesheet Value This Period	\$5,164.50
Total Work Offer	\$95,000.00		

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?

← [Icons] Update Reject Save Save & Close X-AUTHOR Delete Help Request Refresh Check Access Flow Run Report

Time Sheet #14 for 101199212 - Saved

Time Sheet

Time Sheet Time Sheet Entries Time Sheet Line Items Approval Requests Supporting Documents Pro-Forma Invoices Related

Header Details

Vendor * [Redacted] Start Date * 9/1/2025

Work Offer * [Redacted] 101199212-Work Offer for Servi... End Date * 9/5/2025

Time Sheet Totals

Total Time	108.00	Total Mileage	0.00
Last updated:	10/27/2025 5:37 AM	Last updated:	10/27/2025 5:37 AM
Total Days	0.00	Total Non-Labor	\$5,754.60
Last updated:	10/27/2025 5:37 AM	Last updated:	10/27/2025 5:37 AM
Total Labor	\$13,725.00	Timesheet Value This Period	\$19,479.60
Total Work Offer	\$300,000.00		

Non-Labor Charges

Charge Ty...	Service	Description
Equipment	Contract Labor - Field Mainte...	1000x Polaris Side by Side
Equipment	Contract Labor - Field Mainte...	100HP Tractor w/12-15ft Batwing

Rows: 2

Time Sheet Rejection Details

Rejection Reason

On Hold
Approval 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 DocControl 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.