

Time and Expense – Reporting Guidelines

When entering Timesheets and Expenses, all Clarity tasks will be presented for selections. The user must be careful to only select a Labor task for Timesheet entry, or an Expense task for Expenses

Timesheet

- Only one timesheet per subcontractor, per week can be entered
- Includes all hours worked on all projects/all tasks by that Worker during that period

Expenses

- Multiple expense vouchers can be entered for any day, time period dependent
- Expense vouchers can have multiple items (e.g., airfare, hotel, meal) on one voucher, but only one work order

Weekly Process Schedule

- T&E submission by Saturday
- PM approval by the following Tuesday
- Invoice run Thursday, payment per terms

Time and Expense – Time Entry

The image consists of three overlapping screenshots of the Infor VMS Vendor Beeline interface, illustrating the search process for timesheets. Each screenshot shows the user's profile (Syrena Kovatch) and navigation menus (Quick Links, Manage/Search, Report Gallery, Admin).

- Top Screenshot:** A dropdown menu is open, showing options: Search Reports, Search Timesheets (highlighted with a red circle), and Search Expenses. A callout box labeled "Select Record Type" points to this menu.
- Middle Screenshot:** The "Search Timesheets" dropdown is selected, and the search field contains "202". A result "Keith Haggard (61721)" is visible below the search bar. A callout box labeled "Key WO #, let search return results & select" points to the search field.
- Bottom Screenshot:** The search field now contains the string "hagga". The result "Keith Haggard (61721)" is still visible. A callout box labeled "Can also use string search on name" points to the search field.

Time and Expense – Time Entry

The screenshot displays the Infor VMS Vendor Beeline interface for Time Entry. At the top, there is a navigation bar with the Infor logo, a welcome message for Dale Menefee, and a search bar for timesheets. Below this is a secondary navigation bar with options like 'New', 'My Beeline', 'Quick Links', and 'Manage'. The main content area is titled 'Time and Expense' and includes a 'Home' link. A green callout box highlights the top navigation area as the 'Top half of Timesheet screen'. Below the navigation, there are tabs for 'Timesheets' and 'Expenses'. A callout points to these tabs as a 'Toggle between Timesheets and Expenses'. A blue banner contains a 'showcase tour' link, with a callout stating it is 'recommended for new users'. Below this, a section titled 'Viewing timesheets for supplier: BAILS & ASSOCIATES LLC' shows a list of missing timesheets. A callout points to a 'show_all' link as 'Can Display All missing timesheets (for this Worker)'. The list includes three entries: 'September 18 - September 24, 2017', 'September 25 - October 01, 2017', and 'October 02 - October 08, 2017'. A callout points to the first entry as 'Timesheet currently being displayed'. Below the list, a callout points to a warning icon and text 'This timesheet has multiple entries. Please scroll down to enter your time.' as 'Can scroll to display timesheets for other reporting periods'. At the bottom, there are buttons for 'Save Changes', 'Submit for Approval', and 'More Actions'. A callout points to these buttons as 'Save or Submit'. The footer includes the Infor logo, the text 'S3F - S3 Applications - USA-Consultant-S3F', a 'show details' link, a 'copy previous week' link, a note 'Note: You are prohibited from entering future time', and the URL 'infor.com'.

Time and Expense – Time Entry

Comments: Save Changes Submit for Approval More Actions
 cancel

copy previous week

Lower half of Timesheet screen

Work Order Project 32421793-Moses H Cone Memorial Hospital - Upgrade X
Date Range 9/18/2017 - 10/31/2017
Cost Center PIC09-LHA-Lawson Healthcare Analytics
Project Manager Roxanne Howard

Project * 32421793-Moses H Cone Memorial remove * Holiday * Weekend

Task *	Pay Code *	Mon	Tue	Wed	Thu	Fri	Sat	Sun	TOTAL
BILLEXP-7166720-Expenses	Regular Time								0

+ Add new project

S30 - S3 Other - USA-Consultant-S30

All valid Work Orders for this Worker for this period

Project * 32414717-Childrens Omaha-v10 Uj remove * Holiday * Weekend

Task *	Pay Code *	Mon	Tue	Wed	Thu	Fri	Sat	Sun	TOTAL
	Regular Time								0

+ Add new project

TOTAL HOURS 0 0 0 0 0 0 0 0 0

S30 - S3 Other - USA-Consultant-S30 [hide details](#)

Work Order ID 201
Industry Infor Services_USA
Work Order Project 32414717-Childrens Omaha-v10 Upgrade & Cloud Migration
Date Range 9/18/2017 - 10/31/2017
Cost Center PIC09-S30-S3 Other Products
Project Manager Roxanne Howard

WO details

Project * 32414717-Childrens Omaha-v10 Uj remove * Holiday * Weekend

Clarity project

Task *	Pay Code *	Mon	Tue	Wed	Thu	Fri	Sat	Sun	TOTAL
	Regular Time								0

+ Add new project

Select Task **Enter Time**

TOTAL HOURS 0 0 0 0 0 0 0 0 0



Time and Expense – Time Entry

Comments:

copy previous week

1DM - EPAK - USA-COE Consultant - Onshore-1DM [hide details](#)

Work Order ID 47
Industry Infor Services_USA
Date Range 7/3/2017 - 10/2/2017
Cost Center PAMAX-1DM-EPAK
Hiring Manager Michael Wood

		* Holiday							Weekend		
Project *	Task *	Cost Center	Pay Code *	Mon	Tue	Wed	Thu	Fri	Sat	Sun	TOTAL
<input type="button" value="🗑️"/> 20010460	Baseline Integration		Regular Time	8	8	4					20
<input type="button" value="⊕"/>											
TOTAL HOURS				8	8	4	0	0	0	0	20

Must pick a non Expense task !!

Time and Expense – Time Entry

Save timesheet

Aug 14 - Aug 20, 2017
not submitted
20 hours
Saved by WorkerB BeelineB Aug 14 2017, 12:55 PM EDT

Save Changes Submit for Approval More Actions

Export to PDF View Details

Submit timesheet

Aug 14 - Aug 20, 2017
submitted
20 hours
Submitted by WorkerB BeelineB Aug 14 2017, 1:06 PM EDT

Edit Timesheet More Actions

Export to PDF View Details

Confirm Submit for Approval

You are about to submit the timesheet for approval.

Keep Editing Submit for Approval

Time and Expense – Expense Entry

When entering Expenses, the user must be careful when entering currency and VAT.

Expenses

- Enter expenses in the relevant billing currency as shown in VMS on top of the amount field
- Convert foreign currency expenses by actual conversion rate from the link below
- Domestic costs with domestic VAT – Enter net amount unless contractor is unable to reclaim VAT (e.g. entertaining expenditure)
- Foreign costs with foreign VAT – Enter gross cost

<https://www.reuters.com/markets/currencies>

Time and Expense – Expense Entry

Timesheets ¹ Expenses ²

Welcome to Beeline Expense Entry. For a brief introduction, view the [showcase tour](#).

Viewing vouchers for supplier: BAILS & ASSOCIATES LLC Resource: Boyd, Meliza

search New Expense Voucher
No Description
0 - not submitted

Choose A Work Order

Job Title	Work Order ID	Industry	Work Order Project	Date Range	Cost Center	Project Manager	
ELN - Baan or LN-CAN-Project Manager-ELN Active	257	Infor Services_CAN	32456024-Ames Tile - End to end and UAT Test ID 7	10/02/2017 - 12/17/2017	PICCG-SMS-Smartstream Products	Mary Downes	Create Voucher
EST - eStorefront-CAN-Consultant, Sr.-EST Active	116	Infor Services_CAN		09/24/2017 - 12/26/2017	PICBT-EST-eStorefront Products	Timothy Lyford	Create Voucher
EST - eStorefront-CAN-Consultant, Sr.-EST	112	Infor Services_CAN	32448196-Bolt Supply-100053320-SIPM2016-	09/22/2017 - 12/24/2017	PICBT-EST-eStorefront	Timothy Lyford	Create Voucher

Scroll to previously created voucher

or

Presented with valid WOs, select 'Create Voucher'

Time and Expense – Expense Entry – New

cancel

1DM - EPAK-USA-COE Consultant - Onshore-1DM [show details](#)

Project: [OEM] Hobsons - Naviance Dashboards-Proj
Purpose*: Consulting
Attachments: Arnie receipt
Task: BILLEXP-7762042-Expenses
Upload Attachment

Date	Description (include location of expense)	Expense Type	Project Type	Cost Center	Amount
					\$D\$0.00

“Description” = vendor + City & State/Province

Expense Entry

Date *	Description (include location of expense)	Expense Type	Project Type	Cost Center	Amount (USD)	
6/23/2017	Arnie's Diner - Dallas TX			PAMAX-1DM-EPAK	US\$	<input type="text"/> Add Entry cancel

Vendor:

Receipt:

Per Diem:

Additional Details:

Expense Type dropdown: Airfare-715110, Booking Agent Fee-715160, Breakfast-715120, Car Mileage-715130, Car Rental-715125, Currency Exchange Fee-715120, Dinner-715120

Time and Expense – Expense Entry – New

cancel

1DM - EPAK-USA-COE Consultant - Onshore-1DM [show details](#)

Project: [OEM] Hobsons - Naviance Dashboards-Proj
 Purpose*: Consulting
 Task: BILLEX-7762042-Expenses

Attachments: **X Arnie receipt**
 Upload Attachment

Date	Description (include location of expense)	Expense Type	Project Type	Cost Center	Amount
					TOTAL USD\$0.00

Expense Entry

Date *	Description (include location of expense) *	Expense Type	Project Type	Cost Center	Amount (USD) *	
6/23/2017	Arnie's Diner – Dallas TX	Dinner	Time and Materials	PAMAX-1DM-EPAK	USDS 15.50	Add Entry cancel

Vendor: Arnie's
 Receipt: Yes No
 USD\$

Additional Details

Depending on the Expense Type different detail fields will appear

- Always put provider name and location in 'Description'
- If "Car Mileage" type, you must include "Total Miles"
- If hotel, enter room rate and room tax for one day, enter '1' in 'Nights' field
Each night is additional entry

Time and Expense – Expense Entry – New

1DM - EPAK-USA-COE Consultant - Onshore-1DM [show details](#)

Project
[OEM] Hobsons - Naviance Dashboards-Proj

Purpose *
Consulting

Attachments
✘ Arnie receipt

Task
BILLEXP-7762042-Expenses

Upload Attachment

Date	Description (include location of expense)	Expense Type	Project Type	Cost Center	Amount
					TOTAL USD\$0.00

Expense Entry

Date *	Description (include location of expense)	Expense Type	Project Type	Cost Center	Amount (USD) *
6/23/2017	Arnie's Diner – Dallas TX	Dinner	Time and Materials	PAMAX-1DM-EPAK	USD\$ 15.50

Vendor
Arnie's

Receipt
Yes

Per Diem Rate (USD)
USD\$

Additional Details

Add Entry
cancel

Time and Expense – Expense Entry – New

search **New Expense Voucher**
No Description
0 - not submitted

Save Changes **Submit for Approval** More Actions
cancel

1DM - EPAK-USA-COE Consultant - Onshore-1DM show details

Project: [OEM] Hobsons - Naviance Dashboards-Proj
Task: BILLEXP-7762042-Expenses
Purpose: Consulting
Attachments: **X Annie receipt**
Upload Attachment

Date	Description (include location of expense)	Expense Type	Project Type	Cost Center	Amount
6/23/2017	Arnie's Diner – Dallas TX	Dinner	Time and Materials	PAMAX-1DM-EPAK	USD\$15.50
Vendor: Arnie's		Receipt: Yes	Additional Details		
Per Diem Rate (USD)					

TOTAL USD\$15.50

Expense Entry

Date *	Description (include location of expense) *	Expense Type	Project Type	Cost Center	Amount (USD) *
mm/dd/yyyy				expense date required	USD\$

Add Entry
cancel

Confirm Submit for Approval
You are about to submit the voucher for approval.
Keep Editing **Submit for Approval**

Time and Expense – Expense Entry – From Previous

Timesheets 1 Expenses 2

Welcome to Beeline Expense Entry. For a brief introduction, view the [showcase tour](#).

Viewing vouchers for supplier: BAILS & ASSOCIATES LLC Resource: Boyd, Meliza

search New Expense Voucher
No Description
0 - not submitted

Save Changes Submit for Approval More Actions

cancel

ELN - Baan or LN-CAN-Project Manager-ELN [show details](#)

Project Purpose * Attachments
Upload Attachment

32428748-University of Iowa Health System-Cloud-32428748-32428748
32431969-Seminole Test Project Update-32431969-32431969-Seminole Test Project Update
32438631-The Kansas City Southern Railway - Interface Support Services-32438631-32438631
32438658-Sonapar Canada ??? CS20160419MB-03 ??? MaxCapture Implemen
32438658-32438658
32448196-Bolt Supply-100053320-SIPM2016-Software Intg Proj Mgmt-32448196-32448196
32455966-Lockman P2P-423130317-32455966-32455966
32456024-Ames Tile - End to end and UAT Test ID 7-32456024-32456024
32456024-#BTAX check project Quebec-32456104-32456104
32456105-#BTAX check project Alberta-32456105-32456105

TOTAL USD\$0.00

Type Cost Center Amount (USD) *
expense date required: US\$ Add Entry
cancel

Must re-select correct Project

ELN - Baan or LN-CAN-Project Manager-ELN [show details](#)

Project Purpose * Attachments
Upload Attachment

Task

BILLEXP-7762042-Expenses
BILTRVL-7762041-Travel Time

Expense Type Cost Center

Then must select Expenses task

Time and Expense – Expense Entry – From Previous

Timesheets 2 Expenses

Welcome to Beeline Expense Entry. For a brief introduction, view the [showcase tour](#).

Viewing vouchers for supplier: CLINTON RUBIN LLC

search **New Expense Voucher**
No Description
0 - not submitted

Save Changes Submit for Approval More Actions ▼
cancel

1DM - EPAK-USA-COE Consultant - Onshore-1DM [show details](#)

Project: [OEM] Hobsons - Naviance Dashboards-Proj
Task: BILLEXP-7762042-Expenses

Purpose * Consulting
Attachments: Upload Attachment

Date	Description (include location of expense)	Expense Type	Project Type	Cost Center	Amount
					TOTAL USD\$0.00

Expense Entry

"Amount" is in currency of WO
Do any conversions prior to entry

Date * mm/dd/yyyy Description (include location of expense) *Expense Type Project Type Cost Center expense date required Amount (USD) * USD\$ Add Entry
cancel



Time and Expense – Expense Entry – From Previous

The screenshot displays the 'New Expense Voucher' form in the Infor VMS Vendor Beeline. At the top, there is a search bar and a dropdown menu showing 'No Description' and '0 - not submitted'. Below this are buttons for 'Save Changes', 'Submit for Approval', and 'More Actions'. The main form is titled '1DM - EPAK-USA-COE Consultant - Onshore-1DM' and includes fields for 'Project' ([OEM] Hobsons - Naviance Dashboards-Proj), 'Purpose' (Consulting), and 'Attachments' (Hotel receipt, Annie receipt). A table lists the expense entry with the following data:

Date	Description (include location of expense)	Expense Type	Project Type	Cost Center	Amount
6/23/2017	dinner in DC	Dinner	Time and Materials	PAMAX-1DM-EPAK	USD\$15.50

Below the table, there are fields for 'Vendor' (Arnie's Diner – Dallas TX), 'Receipt' (Yes), and 'Per Diem Rate (USD)'. The total amount is 'TOTAL USD\$15.50'. At the bottom, there is an 'Expense Entry' form with fields for 'Date', 'Description', 'Expense Type', 'Project Type', 'Cost Center', and 'Amount (USD)'. A 'Confirm Submit for Approval' dialog box is open on the right, displaying the message 'You are about to submit the voucher for approval.' and buttons for 'Keep Editing' and 'Submit for Approval'.

Time and Expense – Expense Entry – Attachment

The screenshot displays the Infor VMS Expense Entry interface. At the top, there are tabs for 'Timesheets' and 'Expenses'. A welcome message reads: 'Welcome to Beeline Expense Entry. For a brief introduction, view the [showcase tour](#)'. Below this, it states 'Viewing vouchers for supplier: CLINTON RUBIN LLC'. A search box for 'New Expense Voucher' shows 'No Description' and '0 - not submitted'. There are buttons for 'Save Changes', 'Submit for Approval', and 'cancel'.

The main section is titled '1DM - EPAK-USA-COE Consultant - Onshore-1DM' with a 'show details' link. It includes fields for 'Project' ('[OEM] Hobsons - Naviance Dashboards-Proj') and 'Task' ('BILLEXP-7762042-Expenses'). A 'Purpose *' dropdown is set to 'Consulting', and an 'Attachments' section has an 'Upload Attachment' button. A table below shows columns for 'Date', 'Description (include location of expense)', 'Expense Type', 'Project Type', 'Cost Center', and 'Amount'. The total amount is 'TOTAL USD\$0.00'.

Three modal windows are overlaid on the interface, each titled 'Select BTE Expense Attachment'. The first modal shows an 'Upload' button and a 'Browse...' button circled in red. The second modal shows the 'Upload' button circled in red and a file path 'C:\Users\dmenefee\Pictures\boating\83 Cat 30 - Ca' with a 'Browse...' button. The third modal shows a 'Save' button circled in red and an 'Attachment Information' section with a title 'Hotel receipt' circled in red.

A callout box with a white background and black border points to the 'Amount' field in the table. The text inside the callout box reads: "Amount" is in currency of WO Do any conversions prior to entry.

Time and Expense – Expense Entry – Edit

Welcome to Beeline Expense Entry. For a brief introduction, view the [showcase tour](#).

Sep 22 - Sep 22, 2017
Test Only
CAD\$146.50 - not submitted #182
Saved by Meliza Boyd Sep 25 2017, 4:44 PM EDT

Save Changes Submit for Approval More Actions -
cancel

EST - eStorefrnt-CAN-Consultant, Sr.-EST [show details](#)

Project: 32448196-Bolt Supply-100053320-SIPM201 Purpose: Attachments: [Upload Attachment](#)

Task:

Description (include location of expense)	Expense Type	Cost Center	Amount
9/22/2017 Car Mileage to Customer site	Car Mileage	PICBT-EST-eStorefront Products	CAD\$25.00

Vendor: Receipt: Additional Details:

From: To: Total Miles: 50

9/22/2017 Hilton Garden, Toronto

Vendor: Receipt: Additional Details:

Check-in Date: Room Rate (CAD): Nights: 1

Expense Entry

Date *	Description (include location of expense)	Expense Type	Cost Center	Amount (CAD) *
9/22/2017	Car Mileage to Customer site	Car Mileage	PICBT-EST-eStorefront	CAD\$ 25.00

Update Entry
cancel

Vendor: Receipt: Additional Details:

From: To: Total Miles: 50.00