



PUBLIC

SAP Fieldglass

# Supplier Workflows for Contingent and Services

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# 1 Overview

This guide provides a basic understanding of how to use the SAP Fieldglass application to manage job postings, workers, and related items such as work orders, time sheets, and statements of work.

The SAP Fieldglass application simplifies key tasks such as responding to job postings, confirming work assignments, and tracking revisions for existing workers. The steps described in this guide are designed to serve as a basis for understanding the application functionality and may not fully represent the actions required by all suppliers.

## 2 The SAP Fieldglass Application

SAP Fieldglass is a web-based application that runs from your internet browser and helps you manage your contingent workforce.

After a buyer company invites a supplier to their contingent workforce management program, the supplier company must sign an SAP Fieldglass Supplier Access Agreement (SAA) before the supplier's SAP Fieldglass account can be created. After the SAA is signed, an invitation to register for the SAP Fieldglass application is sent.

Registration emails are sent to the primary contact provided by the buyer company. The supplier primary contact is created as an administrator in the SAP Fieldglass application and can add additional supplier users as needed. It's the responsibility of the supplier administrator, not the buyer or SAP Fieldglass, to add additional supplier users.

When new users are created, they receive an email with instructions on how to register their SAP Fieldglass account. When they've successfully registered their SAP Fieldglass user accounts, they can log in with their new usernames and passwords.

### 2.1 Registering in SAP Fieldglass

Suppliers can register new supplier accounts after the registration email is received from the buyer company.

#### Context

When a supplier has been invited to join the SAP Fieldglass system for a specific buyer company, the supplier primary contact receives an email with instructions on how to register their account. The supplier primary contact's account is automatically created as an SAP Fieldglass Administrator account. Administrators have access to all features within their supplier account and can create additional supplier user accounts for others in their organization. Newly created users receive an email regarding SAP Fieldglass registration:

#### SAP Fieldglass Registration Emails

| From:          | Subject                                       | Description                                                |
|----------------|-----------------------------------------------|------------------------------------------------------------|
| SAP Fieldglass | Invitation to join the SAP Fieldglass system. | Contains the link to the SAP Fieldglass registration page. |

The registration emails expire after 21 days. If your registration email expires, please contact the SAP Fieldglass Customer Support Team to generate a new one.

## Procedure

1. Choose the link in the email to go to the SAP Fieldglass website.
2. Choose [Yes](#) or [No](#) to indicate whether or not you have an existing SAP Fieldglass account. If you select [Yes](#), you must enter the company details to link the existing account to your new one. Choose [Submit](#) once you're finished.
3. If you selected [No](#), choose [Continue](#) to begin creating your new supplier company account.
4. Enter a Username and Password, along with user preferences.
5. Review all fields and update any fields that aren't accurate.
6. Choose [Sign In](#).

## Results

After choosing the [Sign In](#) button, your supplier administrator account is created and you can begin creating user accounts for others in your organization.

### 2.1.1 Completing Supplier Registration

A buyer invitation is required to register as a supplier in SAP Fieldglass.

#### Signing the SAP Fieldglass SAA

To complete the registration process, you must take the following steps to electronically sign the SAP Fieldglass supplier access agreement, or SAA:

1. Read the SAA and choose the [I have read and understood the above information and agree to the terms and conditions on behalf of \[Company Name\]](#) option.
2. Enter your name in the required format: /Your Name/.
3. Choose [Accept and Continue](#) or [Decline](#).

If you aren't the correct person to sign the SAA for your organization, choose the [I am not the correct person](#) option. This allows you to forward the SAA to another person who can sign it. Note that if the buyer has configured Single Sign-On (SSO), this option is unavailable.

The user who completes the registration process is prompted to optionally use the Company Setup Wizard to set up the supplier company in SAP Fieldglass. When the user chooses [OK](#), the user's SAP Fieldglass Home page is displayed. From the Home page, the user can launch the Company Setup Wizard or create a Supplier Storefront.

## 2.2 Basic Navigation Concepts

Access key areas and documents in the SAP Fieldglass Application using various navigation tools, such as the side panel and global search functionality.

### Navigation

At the top of the screen, the system displays the user icon or photo. Selecting the user icon or photo allows you to configure your settings, as well as other linked user accounts. Additionally, the side panel on the left displays menus that access to the various functions within SAP Fieldglass. Choose the [Home](#) button on the menu bar or the SAP logo at any time to return to the SAP Fieldglass home page.

To find work items, such as job postings or work orders, choose the **View Work Items Menu** to view all active work items for your account. Work items are also displayed in the My Work Items card on the home page.

Navigating in SAP Fieldglass is accomplished through menus. Menus are listed on the side panel of every page or in the header bar at the top of every page in SAP Fieldglass:

#### SAP Fieldglass Menus

| Menu             | Description                                                                                                                                                                                                                                                                                                                |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Home             | The <b>Home</b> page (or SAP Fieldglass desktop) is your starting point within SAP Fieldglass. The SAP Fieldglass desktop provides you with quick access to messages and items requiring your attention (work items). Select the <b>Home</b> button on the side panel at any time to return to the SAP Fieldglass desktop. |
| My Items         | Use the <b>My Items</b> menu to locate and view items that are relevant to you. The <b>My Items</b> menu contains My Active Job Postings, Favorites, Interviews, and Annotations. The My Items menu is located on the side panel.                                                                                          |
| Contingent Labor | Use the <b>Contingent Labor</b> menu to find items that are related to the contingent module. The <b>Contingent Labor</b> menu contains Job Posting, Job Posting Template, Candidate, Applicant, Job Seeker, Shift Manager Dashboard, and Shift Positions. The Contingent Labor menu is located on the side panel.         |
| Services         | Use the <b>Services</b> menu to find items that are related to the Services module. The <b>Services</b> menu contains items Statement of Work, SOW Bid, SOW Line Item, and SOW Activity Item. The Services menu is located on the side panel.                                                                              |
| Worker           | Use the <b>Worker</b> menu to find items related to workers. The Worker menu contains Worker, Work Order, Workforce Worker Activity Item, Time Sheet, Expense Sheet, and Absence. The Worker menu is located on the side panel.                                                                                            |
| Payments         | Use the <b>Payments</b> menu to find items relating to transactions. The <b>Payments</b> menu contains Invoice, Credit/Debit Memo, Miscellaneous Invoice. The Payments menu is located on the side panel.                                                                                                                  |

## SAP Fieldglass Menus

|                |                                                                                                                                                                                                                                                                                                                                                    |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Analytics      | Use the <b>Analytics</b> menu to find items relating to reports. The Analytics menu includes My Reports, All Reports, Report Outputs, Report Fields, and Formulas. The Analytics menu is located on the side panel.                                                                                                                                |
| Buyer          | Use the <b>Buyer</b> menu to view items related to buyers, such as buyer companies, supplier qualification forms, or supplier improvement plans. The Buyer menu is located on the side panel.                                                                                                                                                      |
| Create         | Use the <b>Create</b> menu to create new transactions in SAP Fieldglass. The items you can create are based on your specific system configuration. Examples of new transactions are workforce, invoices, and miscellaneous invoices. The Create menu is located on the side panel.                                                                 |
| Admin          | Use the <b>Admin</b> menu to access My Profile and My Preference, as well as the <b>Admin</b> menu, which is used to access the SAP Fieldglass Administrative functions. The Admin menu is located at the bottom of the side panel.                                                                                                                |
| Help           | Use the <b>Help</b> menu to access Release Communication, Product Documentation, the Reference Library, and Training Courses. In addition, the <b>Help</b> menu allows you to view the contact information for SAP Fieldglass support as well as the SAP Fieldglass application version. The Help menu is located at the bottom of the side panel. |
| Message Center | Choose the <a href="#">Message Center</a> option from the My Items section of the vertical and horizontal navigation menus to navigate to the Message Center and view your messages.                                                                                                                                                               |
| Work Items     | Use the <b>View Work Items Menu</b> to display a list of current items that require action. The View Work Items Menu is located on the header bar.                                                                                                                                                                                                 |

## Tabs

Job postings, work orders, and worker records use tabs to group and display related information. Choose each tab to view additional information about the document. For example, the Job Seekers tab for a job posting lists all job seekers that you've submitted to this posting.

A [Search](#) field is visible when viewing some documents. You can use the search functionality to find specific terms or fields across all tabs on a document, highlighting the tab in which the term appears as well as the term itself.

## 2.2.1 Logging in to SAP Fieldglass

You can access your SAP Fieldglass account using the proper URL for your data center.

### Context

Users who have already registered in SAP Fieldglass can sign in directly to the SAP Fieldglass application from their internet browser.

### Procedure

1. To log in to SAP Fieldglass, navigate to **<https://www.us.fieldglass.cloud.sap>** (suppliers working with European data center customers should use **<https://www.eu.fieldglass.cloud.sap>**).
2. Enter your *Username* and *Password*. (If you've forgotten your username or password, choose *[Need Assistance with Login/Registration?](#)* For assistance.)
3. Choose *[Sign In](#)*.

## 2.2.2 Changing Your Password

If necessary, you can change your SAP Fieldglass password after signing in. Changing your password periodically is helpful for mitigating security risks to your account and organization.

### Context

To change your SAP Fieldglass application password:

### Procedure

1. Choose the avatar/profile icon in the top-right corner of your Home page and select *[Settings](#)*.
2. Choose the *[Change Password](#)* link in the User Information section.
3. In the *[Current Password](#)* field, enter the password that you used to log in.
4. In the *[New Password](#)* field, enter your new password. In the *[Confirm Password](#)* field, enter your new password again.
5. Choose *[Change](#)* to finish updating your password.

## 2.2.3 Updating Your Email Addresses and Contact Information

Contact information for your SAP Fieldglass account can be updated at any time by using the avatar/profile icon in the top-right corner of your Home page. You can include a number of different contact options, such as email addresses, mobile numbers, and the public URL for your LinkedIn profile if desired.

### Context

To access your profile and begin updating your contact information, take the following steps:

### Procedure

1. Choose the avatar/profile icon in the top-right corner of your Home page. Select [Settings](#) from the menu.
2. Choose [Edit](#) in the User Information section where your name is displayed. In the Basic Information section, enter an updated [First Name](#) and [Last Name](#) if desired.
3. In the **Email** field, enter the email address where all of your email notifications in the SAP Fieldglass application should be sent.
4. If applicable, enter any email addresses you wish to be included in notifications from SAP Fieldglass using the [Cc Email Addresses](#) field. To enter multiple CC email addresses, separate each address with a comma or a semicolon.
5. Scroll down to the Contact Information section and enter any contact details you wish to be visible to others in SAP Fieldglass.
6. Choose [Update](#) to save your changes.

## 2.2.4 Updating Your Proxy Information

You can enable other users in your organization to take actions on certain work items in your place by using proxies.

### Context

A proxy is a person who can act on your work items in the SAP Fieldglass system, such as responding to a job posting, accepting an interview schedule, or accepting a work order when you're unavailable to do so yourself. To set up another user as a proxy, take the following steps:

## Procedure

1. Choose the user icon in the upper right corner of the page. Choose [My Profile](#) from the menu that appears.
2. Scroll down to the Proxies and Delegates section.
3. Choose [Edit](#).
4. To add a new proxy, choose [Add Proxy](#).
5. Under Work Items, select [All](#) to allow the proxy to act on all of your work items. Select [Time Sheet](#) to allow the proxy to approve time sheets only.
6. In the Proxy dropdown menu, choose the name of the proxy you want to add.
7. Choose the calendar icons next to the [Start Date](#) and [End Date](#) fields to establish the time period during which this person should be your active proxy. If you leave these fields blank, the person selected becomes your proxy as soon as you choose [Add](#), and remains your proxy until you remove them.
8. Choose [Add](#) to save your changes.
9. To change the start date or end date for an existing proxy, choose [Edit](#) next to the proxy you want to update on the My Profile page. Choose [Update](#) to save your changes.

## 2.2.5 Customizing Reports and Charts

You can customize your Home page to display specific reports and charts.

### Context

Adding customized content to your Home page can save you time by helping you track important details for your organization without needing to search for them. To customize your Home page:

## Procedure

1. On your SAP Fieldglass Home page, choose the [Customize Reports and Charts](#) button or wrench icon.
2. Select **+ Add Reports or Charts** to search for a report or chart.
3. Select the checkbox for the report or chart you want to add to your home page, and choose **Add**.
4. You can change the sort order of the reports and charts once you've added them to the Reports and Charts modal, as well as whether they appear at Full or Half width on your Home page.
5. When you've completed your selections, choose [Update](#).

## 2.2.6 Updating Your SAP Fieldglass Settings

The Settings page allows you to update how certain information is displayed in SAP Fieldglass, such as the time zone or date format on documents.

### Context

The Settings page, available by selecting your photo or avatar, allows you to change or update your settings. Examples include your password, time zone, language defaults, time formatting and more. The sections include:

- [User Information](#): Add or edit your basic contact information, profile picture, password, and more.
- [Appearance](#): Customize the appearance of your SAP Fieldglass experience with the following options:
  - [Color Theme](#): Choose the application's color theme from the available options, Quartz Light, Quartz Dark, Morning Horizon, Company Branded, or High Contrast Black. The High Contrast Black option is designed to help visually impaired users that have trouble seeing subtle color differences.
  - [Landing Page upon Log In](#): Choose which page displays when you log in.
  - [Default Tab On Documents](#): Choose whether you would like the Details or Summary tab to display on documents. The Details tab provides specific information about the document and the Summary tab provides a basic summary version.
  - [Work Items Cache](#): All of your work items are cached to reduce their performance impact, and you can use the [Refresh](#) button in the Work Items Menu to manually refresh the list.
  - [Home Page Settings](#): The Home Page Settings section gives you the option to display the SAP Fieldglass Manager Hub app announcement and also allows you to add and sort reports using the [+Add Reports](#) link and the drag and drop feature.
- [Language & Region](#): Set your time zone, currency, language, and formats for time, date, number, and calendar.
- [Notifications](#): Set your notification preferences for Email, Email Messages, System Messages, Send Notification Digest, Scheduled Delivery Time for Notification, Send Work Item Digest, and Scheduled Delivery Time for Work Item Digest(s).
- [Organizational Structure](#): Define or edit information for the default legal entity, primary business unit, default site, and default cost center.
- [Linked Accounts](#): Link other accounts. You can also disable this functionality if you'd like.
- [Proxies](#): Add or manage your proxies.
- [Delegates](#): Add or manage your delegates.

To update your settings, use the following steps:

### Procedure

1. Choose the user icon in the upper right corner of the page. Select [Settings](#) from the menu.
2. Choose [Edit](#) next to the section you want to modify.

3. Choose [Update](#) when finished to save your changes.

## 2.2.7 Linking User Accounts

Linking user accounts provides you with a quick way of switching between accounts across multiple buyer instances without having to log out.

### Context

If the company configuration [User account linking](#) has been enabled for your organization, user accounts can be linked across instances. For further information on enabling the company configuration, please refer to the Supplier Administrator Reference Guide.

### Procedure

1. Choose the user icon in the upper right corner of the page. Select [Settings](#) in the dropdown menu.
2. Scroll down to the Linked Accounts section and choose [Edit](#).
3. To add a new linked account, choose [Add Linked User Account](#).
4. Enter the username and password for the account that you're linking, as well as an optional nickname and sort order for the account.

The Links from this User Account section shows accounts that can be accessed from the logged in account. The Links to this User Account shows accounts that can access the logged in account. The linking process must be completed from both accounts.

To access a linked account, choose the user icon in the upper right corner of the page and select the account from the dropdown list. You can also view the list of linked user accounts from the Linked Accounts card on the Home page, as well as the number of work items associated to them.

## 2.2.8 Filtering, Sorting, and Grouping Lists

You can filter, sort, and group information shown in lists in the SAP Fieldglass application, which reduces the time needed to locate specific records or documents.

When you filter a list, only those records that meet the search criteria you specify are displayed. To specify search criteria, use the fields located above certain columns. Depending on the data displayed in the column, you can select a value or enter a value that you want to search for. You can also specify the time period in which you want to search. Choose [Apply Filters](#) to apply your search criteria to the list.

Select a column header to sort the list by that column. An arrow pointing up indicates that the column is sorted in ascending order, while an arrow pointing down indicates that the column is sorted in descending order. To

reverse the sort order, select the column header again. By default, items within a list are usually not grouped. To group items, the [Group By](#) field allows you to select a field to group them by. For example, you could group a listing of time sheets by Status or end date.

## Customizing List Views in SAP Fieldglass

Administrators have the option to add fields to list views, which allows you to specify the amount of information they display.

### Context

List views have a number of default fields that are displayed as columns. Additional fields, as well as some custom fields, can be added from the List Views page in the Admin menu.

To add fields to your list views, take the following steps:

### Procedure

1. Navigate to the Admin menu by choosing the gear icon at the top right hand side of the page.
2. Choose the [List Views](#) link under the Configuration section.
3. Choose the list view you want to customize from the list.
4. On the list view Details page, choose the [+Add Fields](#) button to open the Add Fields modal window.
5. Check the box next to any fields you want to add as columns to the list view.
6. Choose [Add](#) once you've finished adding your desired fields.

### Results

After finalizing your changes, the fields you've added will display as columns in the list view. Note that the [List Type](#) determines which version of the list view will display the new fields. For example, if you chose the [Work Items](#) list type for the Job Posting list view, the new fields are only visible on the Job Posting list view on your work items page.

## List View Types

List view types indicate where the list view is located in the application and the type of data it displays.

When viewing the List View admin page, the List Type column indicates the list type of the corresponding list view. This clarifies where the fields added to the list view are applicable. For instance, a field added to the

[Current Data](#) Job Posting list view will not be added to the [Past Data](#) Job Posting list view unless manually added later.

#### List View Types

| List Type    | Description                                                                                                                                                                                                                                                                                                                                                              |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Current Data | <a href="#">Current Data</a> list views display current data for documents in SAP Fieldglass, such as job postings and work orders. This type of list view is typically accessed by selecting a document type through the menus in the left side panel on the home page.                                                                                                 |
| Past Data    | <a href="#">Past Data</a> list views are accessed by navigating to the current data list view for a particular document type. Start by selecting the <a href="#">View More Items</a> button at the top right hand corner of the page, then choose <a href="#">View Past Data</a> . This allows you to view items that have moved out of current data and into past data. |
| Work Items   | <a href="#">Work Items</a> list views display documents on your work items page, and are available for most document types in SAP Fieldglass. For example, a <a href="#">Work Items</a> type list view for job postings displays a list of job postings in your work items, so fields added to the list view display there.                                              |
| Admin Data   | <a href="#">Admin Data</a> list views are visible for items accessed through the Admin menu. For instance, a User list view can be accessed through the admin menu, and displays the list of users for your organization.                                                                                                                                                |

## 2.2.9 Using Message Center

You can access the Message Center to view notifications and alerts regarding certain documents, as well as respond to chats or questions from other users.

### Context

The SAP Fieldglass application sends messages to users notifying them when there are items requiring their attention. For example, you can receive a message when a job posting has been submitted by a buyer or when workers are nearing their end dates.

To view messages in the Message Center, take the following steps:

### Procedure

1. Choose the [Message Center](#) button in the My Items section of the vertical and horizontal navigation menus. You can also choose specific message types from the Messages tab on the Home page to navigate to the Message Center and automatically filter for messages of that type.

2. Use the options on the left side of the page to filter the messages that are displayed in your Message Center.
  - **Subject:** If desired, enter a word or phrase that appears in the Subject of the messages you want to view.
  - **Message Type:** Check the boxes next to the message types you want to view. To view all message types, choose [Select All](#). To remove Favorites, Chat, Notifications, and Broadcast messages from your Message Center list, choose [Select None](#).
  - **Message Status:** Select the [Unread](#) check box to display messages you have not read. Select the [Read](#) check box to display messages you have read.
3. Check [Filter Messages](#) to display the messages that meet your search criteria.
4. Select the column headers to sort the messages in the Message Center.
5. To mark a message as read, select the check box next to the message in the Message Center and choose [Mark as Read](#).
6. To remove a message from your Message Center, select the check box next to the message in the Message Center and choose [Remove Selected](#). The message is permanently deleted from your Message Center. You can't remove Alert messages from the message center.
7. To view a message, select the message in the Message Center list.

If a message includes a [Go to Source](#) link, you can choose the link to display the source of the message. For example, if you choose the [Go to Source](#) link in a time sheet notification, SAP Fieldglass displays the time sheet referenced in the message.
8. When you have finished viewing a message, you can:
  - Choose [Remove Message](#) to remove the message from your Message Center.
  - Choose [Next](#) to view the next message in the Message Center list.
  - Choose [Back to Messages](#) to return to the Message Center list.

## 2.3 ID Naming Conventions

Transaction IDs in SAP Fieldglass are assigned to work items across different modules in the SAP Fieldglass application, and can be used to quickly search for documents in list views or the global search functionality.

SAP Fieldglass is organized by modules, which represent groups of related items or transactions. Every transaction within a module is assigned a unique ID number for tracking. For example, when a job posting is created, it's assigned a unique job posting ID number. SAP Fieldglass uses a consistent convention for assigning ID numbers, which are comprised of three separate components:

1. The Company Code consists of either the buyer's or the supplier's company code, depending on who created the item.
2. The module reference indicates the type of item. For example, JP is used for Job Postings and WO is used for Work Orders.
3. A unique number that is assigned sequentially.

For instance, if a buyer with a company code of LSFG creates a job posting, the job posting ID number might be LSFJJP00000057. If a supplier with a company code of ABCS submits a job seeker for the posting, the job seeker ID might be ABCSJS00000008.

Understanding the ID naming convention helps you easily locate the items you're looking for. In addition, when you contact the SAP Fieldglass Customer Support Team for support, you'll be asked for the ID number of the item you need assistance with.

## 3 Job Postings

Job postings are created by a buyer organization, and are used to notify suppliers of openings for contingent labor.

A job posting lists details such as the job description, location, desired date range, and allowable rates. When a job posting is distributed by the buyer, suppliers can submit job seekers to the posting. Selected individuals at the buyer company review each job seeker submitted and either schedule an interview, select the job seeker for hire, or reject the job seeker based on their compatibility with the role.

### 3.1 Reviewing Job Postings

You can access job postings that have been distributed to you by a buyer company using the Work Items icon at the top right hand corner of the toolbar.

#### Context

When a Job Posting has been submitted for supplier review, the SAP Fieldglass application sends a notification and a work item appears on the supplier's SAP Fieldglass desktop.

The SAP Fieldglass desktop provides easy access to job postings.

#### Procedure

1. From the Work Items icon, choose the [Respond](#) link in the Job Posting section.  
The number after the [Respond](#) link indicates the number of job postings that are available for you to review. The job postings that are available for you to review are listed at the top of the Work Items page, and details about the highlighted job postings are displayed on the lower portion of the page.
2. To view the details for a job posting, select its ID in the list of job postings.
3. The information related to job postings is organized using several tabs, which are described in the following table:

##### Job Posting Tabs

| Job Posting Tab | Description |
|-----------------|-------------|
|-----------------|-------------|

| Job Posting Tabs |                                                                                                                            |
|------------------|----------------------------------------------------------------------------------------------------------------------------|
| Details          | The <b>Details</b> tab displays information about the job posting. Review this information before submitting a job seeker. |
| Job Seekers      | When a job seeker has been submitted, view the current status of the seeker on the <b>Job Seekers</b> tab.                 |
| Rate Details     | The <b>Rate Details</b> tab displays all of the applicable rates for the job posting.                                      |
| Interviews       | The <b>Interviews</b> tab displays the status of scheduled interviews.                                                     |
| Related          | The <b>Related</b> tab displays documents related to the job posting, such as a work order (when created).                 |

## 3.2 Submitting an Existing Worker from Your Workforce

You can respond to a job posting by submitting new job seekers or by selecting workers from your existing workforce in the SAP Fieldglass application.

### Context

Before you can submit workers from your existing workforce, they must be added to your workforce pool. Refer to the [Workforce \[page 65\]](#) section of this guide for information about adding workers to your workforce.

To select and submit an existing job seeker for a job posting, choose [Submit Job Seeker](#) on the Job Posting page. You can access the Job Posting page from the Work Items icon, or by selecting View Job Posting. Selecting this button accesses the Submit Job Seeker page where you can submit a new job seeker or select and submit an existing job seeker.

### Procedure

1. On the Job Posting page, choose [View Workforce](#). This is located under the Job Seeker Details section in a shaded area called [Search Existing Workforce](#). Selecting this button displays a modal on the side of the page that allows you to search all workforce records to determine if an individual has been previously submitted to an assignment through SAP Fieldglass before creating a job seeker.
2. Enter a search keyword for the worker you want to find, as well as radius criteria if desired.
3. Choose [Search](#). The workers who meet your criteria are displayed in the Search Results section. You can preview a profile of each individual by selecting the information icon then select an individual to populate their information.
4. To submit a worker for the job posting, select the worker and choose [Select](#).

5. On the Submit Job Seeker page, complete the required fields.
6. Choose [Submit](#). The job seeker will now have the status of Submitted and is now visible to the buyer for review.

### 3.3 Submitting a New Job Seeker for a Job Posting

Submitting a job seeker to an open job posting allows buyers to review their job seeker record to determine if they're a good fit for the position.

#### Context

To submit a new job seeker for a job posting, choose [Submit Job Seeker](#) on the Job Posting page. You can access the Job Posting page from the Work Items icon, or by selecting ► [View](#) ► [Job Posting](#). ► Selecting this button accesses the Submit Job Seeker page where you can submit a new job seeker or select and submit an existing job seeker.

#### Procedure

1. Enter the job seeker's details.
  - a. Enter the [First Name](#) and [Last Name](#) of the candidate.
  - b. Depending on the buyer's SAP Fieldglass configuration, you may be asked to enter a security ID. The security ID is a unique combination of characters related to the job seeker's personal information. The specific pattern is defined by the buyer, but typical examples include the first initial, last initial, and last four characters of the National ID. Be sure to follow the pattern exactly as specified or SAP Fieldglass displays an error message. When the worker registers in SAP Fieldglass after being hired, the worker will be prompted to enter this same security ID. If the security ID the worker enters doesn't match what you enter here, SAP Fieldglass displays an error.
  - c. Enter the first day that the job seeker is available to work in the **Available Date** field.
  - d. To attach a resume or CV for the job seeker, choose [Attach](#). Choose [Choose File](#), select the file, then choose [Attach](#).
  - e. There may be more fields based on the buyer's configuration. Enter the information as requested.
2. If [Auto-Engage](#) is enabled on the job posting template, the [Register on Behalf of Worker?](#) flag displays and provides the option to register the worker using your supplier email address.
3. If qualifications are listed on the job posting, be sure to submit the candidate's ratings for these qualifications. Some qualifications may be mandatory.
4. To submit attachments, choose [Add Attachments](#) in the Attachments section.
5. Choose [Continue](#). If SAP Fieldglass finds any errors, the system displays a description of the errors and highlights the fields in red. Correct the errors and choose [Continue](#) again.
6. Enter the rate information, such as pay rate or final bill rate, as requested by the buyer. Choose [Continue](#).

7. Review the job seeker information. If any information is incorrect, choose [Make Changes](#) to correct it.
8. If you would like to save the information but not submit, choose [Save Draft](#). You can access the information again from the Job Posting page. If you're ready to submit the job seeker, choose [Submit](#).

The job seeker's status is updated to Submitted. They're now visible to the buyer for review.

## 3.4 Declining a Job Posting

You can decline job postings that are sent to you by buyers in SAP Fieldglass if you feel they aren't suitable for your organization, or don't have the proper candidates to fulfill the requirements set by the buyer.

### Context

Declining a job posting removes the option for your organization to submit candidates to the job posting, unless you go back to the job posting and undecline it at a later time.

The [Decline](#) option is unavailable after a buyer-defined response due date has passed. If you do not see the [Decline](#) option on a job posting, verify that the response period is still open and confirm that your user role includes permission to decline job postings.

Take the following steps to decline a job posting:

### Procedure

1. On the Job Posting page, choose [Actions](#) > [Decline](#).
2. In the Reason list, select the reason that explains why you're declining the posting. If the Reason list doesn't contain any options, ask your SAP Fieldglass supplier administrator to add Job Posting Decline reason codes.
3. Enter additional information in the [Comments](#) field, if necessary.
4. Choose [Decline](#).

### Results

The job posting is declined. To undecline a job posting, navigate to the Job Posting list view page and select the job posting. Choose [Actions](#) and select [Undecline](#).

## 3.5 Withdrawing Job Seekers

You can withdraw job seekers that you've submitted to job postings if the job seeker isn't available.

### Context

If the [Reason](#) list doesn't contain any selections, ask your SAP Fieldglass supplier administrator to add Job Seeker Withdraw reason codes. If you submit a Job Seeker to an open position and find later that the job seeker is no longer available, you can withdraw the candidate by taking the following steps:

### Procedure

1. From the home page, select the [Contingent Labor](#) menu and choose [Job Seeker](#).
2. Use the search options to locate the job seeker you want to withdraw.
3. Choose the Job Seeker ID.
4. Choose [Actions](#) and select [Withdraw](#).
5. Select a [Reason](#) and choose [Withdraw](#).

### Results

The job seeker is now removed from the posting.

### 3.5.1 Job Seeker Status

Job seeker statuses provide you with a quick reference for which stage in the hiring process the job seeker is in, and if any further action is required by you.

As job seekers make their way through the process of being reviewed and hired by a buyer company, their status within SAP Fieldglass moves through the following stages:

**SAP Fieldglass Job Seeker Statuses**

| Job Seeker Status | Description                                                                                                              |
|-------------------|--------------------------------------------------------------------------------------------------------------------------|
| Submitted         | The job seeker has been submitted by the supplier and is waiting for buyer review.                                       |
| Shortlisted       | The buyer has reviewed the job seeker and moved them to a list of job seekers the buyer is considering for the position. |

#### SAP Fieldglass Job Seeker Statuses

|                             |                                                                                                                                 |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| Interviewed                 | The job seeker has been marked as interviewed by the buyer.                                                                     |
| Rejected                    | The job seeker hasn't been selected for the job posting.                                                                        |
| Work Order Created          | The buyer has created a work order for this job seeker and is waiting for acceptance by the supplier.                           |
| Work Order Pending Approval | The work order for the job seeker is in the buyer approval process.                                                             |
| Work Order Accepted         | The work order for the job seeker has been reviewed and accepted by the supplier and is waiting for activation by the buyer.    |
| Work Order Activated        | The worker order has been activated by the Buyer and is waiting for the job seeker to register their account in SAP Fieldglass. |
| Work Order Confirmed        | The job seeker has registered their account, which transitions the job seeker to be a worker in SAP Fieldglass.                 |
| Closed                      | The job seeker has not registered as a worker and the work order has been closed by the supplier.                               |
| Withdrawn                   | The job seeker has been withdrawn from submission by the supplier.                                                              |

## 3.6 Chat Messages on Job Postings

The Chat functionality on job postings allows you to quickly and efficiently communicate with the buyer about the job posting or job seeker.

Often times buyers and suppliers need additional information from each other regarding the job posting or job seeker. You can use the chat functionality on the job posting or job seeker record to request any details that you need to move forward, or respond to the buyer if they have any questions for you. The chat records are visible on the job seeker and job posting records, and are carried forward to the work order and worker records once they're created. This allows you and the buyer to reference information provided earlier through your chats, which can potentially save you time later on.

#### Note

When the *Require Supplier Respond By Date* rule is enabled for a job posting, buyer–supplier chat related to the job posting is restricted after the response deadline passes. This prevents communication between buyers and suppliers once the supplier submission window has closed.

## 3.6.1 Creating Chat Messages

You can send and receive chat messages in the SAP Fieldglass application. Messages allow you to communicate with other users about a certain job posting without exiting the application.

### Context

After receiving a job posting from the buyer, you may have questions about the job posting. SAP Fieldglass provides a chat function that acts as a message board between the buyer and suppliers. Take the following steps to access chats:

### Procedure

1. On the Job Posting page, choose the [Chats](#) icon. To access the job posting, select ► [View](#) ► [Job Posting](#) ► from the menu bar.
2. To send a message to the buyer only, choose the tab that displays the Company Code for the buyer company. Enter the message and choose [Save](#).
3. To send a message to the buyer and all other suppliers who have access to the job posting, choose the All Suppliers tab. Enter the message and choose [Save](#). When a Chat message is added, the buyer is notified and can respond as appropriate.

## 3.7 Interviews

Buyers can choose to schedule interviews with job seekers you have submitted to job postings to determine if they are a good fit for the position, and to learn more about the candidates history beyond what is shown on their job seeker record.

When an interview has been scheduled with one of your job seekers, a notification appears in your Message Center, and a work item is created in your Work Items page. Buyers typically create interviews with job seekers when they have reviewed their qualifications and have additional questions to ask them before moving forward. Interviews can be scheduled to be in person, over the phone, or through video conference, and the interview work item you receive provides these details when you review it. For more information on scheduling interviews, see .

## 3.7.1 Accepting an Interview

You can accept an interview by navigating to the Interview/Meeting Schedule Work Items page.

### Context

If an interview request is sent to you for a job seeker, you'll receive a notification and a work item. Depending on the buyer's settings, you may receive an email as well, which you can use to accept or decline the interview.

To accept an interview schedule:

### Procedure

1. From the [Work Items](#) icon, choose the [Accept](#) link in the Interview/Meeting Schedule section. You can also view interview schedules by choosing ► [View](#) ► [Job Posting](#) ►. Choose the desired job posting and choose the Interviews tab.
2. To view the details for the interview/meeting, choose the interview ID in the list of interview/meeting schedules.
3. To accept the interview, choose [Accept](#).
4. From the list of Proposed Times, select the date and time you want to accept.
5. Choose [Continue](#).
6. Enter Comments as necessary and choose [Accept](#). A confirmation of your selected interview date and time is to the buyer.
7. When the buyer has confirmed the interview date and time, you'll receive a message with the interview details.
8. To add the appointment to your calendar, choose [Click Here](#) in the confirmation message you received from the buyer.

## 3.7.2 Rescheduling Interviews

You can reschedule interviews that you've already accepted for a later date in time if necessary.

### Context

To reschedule an interview:

### Procedure

1. From the [Work Items](#) icon, choose the [Accept](#) link in the Interview/Meeting Schedule section.
2. Choose [Decline and/or Reschedule](#).
3. Enter additional dates/times in the Proposed Times section.
4. Choose [Decline and/or Reschedule](#).

## 3.7.3 Declining Interviews

You can choose to decline an interview request from a buyer if the proposed date or time isn't suitable for you or the candidate.

### Context

To decline an interview:

### Procedure

1. From the [Work Items](#) icon, choose the [Accept](#) link in the Interview/Meeting section.
2. Choose [Decline and/or Reschedule](#).
3. Enter additional information in the [Comments](#) field, if necessary.
4. Choose [Decline and/or Reschedule](#).

## 4 Work Orders

When a job seeker is selected for hire, a work order is created. A work order, initiated by the buyer, contains the dates, rates, and other terms of the job seeker's assignment.

Work orders can also have activity items associated with them. Activity items are tasks associated to a job seeker that need to be completed before starting their assignment. Suppliers are responsible for accepting or declining a work order.

### 4.1 Reviewing Work Orders

Before taking action on work orders, you can review them on the Work Items page.

#### Context

When a buyer creates a work order for a job seeker you submitted, you'll receive a notification and a work item to accept the work order. To access these work items, take the following steps:

#### Procedure

1. From the [Work Items](#) icon, choose the [Accept](#) link in the Work Orders section. You can also view work orders by choosing [View](#) > [Work Orders](#).
2. To view the details of a work order while using the Work Orders list view, choose the work order ID in the list of work orders. When viewing work orders from the Work Items menu, choose the work order ID, then choose the [Go to Details](#) link to navigate to the work order Details page. The information related to the work order is organized using several tabs.

SAP Fieldglass Work Order Tabs

| Tab Name     | Description                                                                                                                                    |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Details      | The <b>Details</b> tab displays detailed information about the work order. Review this information before accepting or declining a work order. |
| Rate Details | The <b>Rate Details</b> tab displays all of the applicable rates for the work order.                                                           |
| Manage       | The <b>Manage</b> tab displays activity items and milestone action items.                                                                      |

#### SAP Fieldglass Work Order Tabs

|                 |                                                                                             |
|-----------------|---------------------------------------------------------------------------------------------|
| Time & Expenses | The <b>Time &amp; Expenses</b> tab displays time sheets and expense report information.     |
| Related         | The <b>Related</b> tab displays documents related to the work order, such as a job posting. |

## 4.2 Accepting Work Orders

Once a work order has been created for a job seeker by the buyer, you can accept it by navigating to the Work Items page.

### Context

To accept a work order:

### Procedure

1. Navigate to the work order page for the work order you want to accept. You can access your work orders from the Work Items icon, or by choosing ► [View](#) ► [Work Orders](#) ►.
2. Choose [Accept](#).
3. Complete the requested fields for the work order acceptance. Each buyer company may require different information.
  - [Supplier Reference](#) is an optional field that can be used to track internal supplier information about the worker, such as an ID number.
  - The [Register on behalf of Worker?](#) Flag provides the option to register the worker using your supplier email address. By default, the flag is set to [No, the worker will self-register](#) and uses the worker's email address for registration. To register with your supplier email address on behalf of the worker, use the slider to select [Yes, I'll register this worker](#) and enter your supplier email address.
  - Enter the correct email address. This email address is used to send the worker the SAP Fieldglass registration emails. Without the registration emails, the worker is unable to access SAP Fieldglass.
  - If you later need to update the email address, you can do so by viewing the work order and choosing [Edit Work Order](#). Update the email address and choose [Update](#). This option is available only when a work order has a status of Accepted or Accepted.
  - Depending on the buyer, you may be required to select a remit-to address. The remit-to address is the address where the buyer should send payment for this particular worker. Remit-to addresses are created and maintained by your SAP Fieldglass supplier administrator.
4. Confirm the [Pay Rate](#) listed. You cannot edit it.
5. Select the appropriate [Adjustments](#) if necessary and enter a value. Adjustments are configured for each buyer and may not be displayed on the work order. Adjustments can include items such as sales tax.

6. Choose [Continue](#).
  - If SAP Fieldglass finds any errors in the information you submit, it describes the errors and highlights the fields in red. Correct the errors and choose [Continue](#) again.
7. Choose [Accept](#).

## Results

Accepting a work order sends a notice to the buyer. The buyer may be required to activate the work order before it's finalized. Depending on the buyer's configuration, registration emails are sent to the worker either as soon as the work order accepted by the supplier, or after the buyer activates it.

## 4.3 Declining Work Orders

You can choose to decline work orders that have been created for a job seeker if you feel that the information entered is incorrect.

### Context

To decline a work order:

### Procedure

1. Navigate to the Work Order page for the work order you want to decline. You can access your work orders by choosing ► [View](#) ► [Work Orders](#). ►
2. Choose [Decline](#).
3. In the Reason list, select the reason that explains why you're declining the work order. If the Reason list doesn't contain any selections, ask your SAP Fieldglass supplier administrator to add Work Order Decline reason codes.
4. Enter additional information in the [Comments](#) field, if necessary.
5. Choose [Decline](#).

## 4.4 Activity Items

Activity items are actions that are assigned to users who need to complete tasks associated to a work order.

Activity items can be assigned to other users in your organization, as well as workers, to ensure that certain actions are completed as part of your company's workflow. For example, a worker may need to complete

training courses or upload specific documents to show the buyer that they are qualified for the position. Additionally, another user in your company may receive an activity item to complete a worker evaluation after a certain amount of time has passed on the worker's assignment. You may also receive notifications reminding you to take action on activity items if the due date is approaching soon and they have not been completed.

## 4.5 Reviewing Activity Items

You can review activity items on work orders using the Manage tab, the Worker Activity Item section of the Worker menu, or the Activity Item list view page.

### Context

To begin reviewing activity items on work orders, take the following steps:

### Procedure

1. From the home page, select the [Worker](#) menu and choose [Worker Activity Item](#).
2. Choose the highlighted Action name of the activity item from the list that you want to view.
3. Review the details of the activity item, such as the name of the [Actor](#), who is responsible for completing the activity item, or the list of users that received the activity item.
4. Complete the actions that are requested. These actions can include items such as completing attached forms, completing information requests, or other actions that need to be taken outside of the SAP Fieldglass application.

### Results

After completing the requested actions for the activity item, you can return to the activity item and choose the [Mark as Complete](#) button. This will update the status of the activity item to Completed.

## 4.6 Accepting Work Order Revisions

Buyers can choose to make revisions to work orders if certain information needs to be updated, such as the start and end date or other terms of the assignment.

### Context

Changes to work orders, such as extending a worker's end date, are known as work order revisions. Revisions, initiated by a buyer, must be accepted by the supplier. Take the following steps to accept a work order revision:

### Procedure

1. From the [Work Items](#) icon, choose the [Accept](#) link in the Work Order Revisions section. You can also view work order revisions by choosing [View > Work Order Revisions](#), selecting the desired work order, and choosing the Revisions tab. Revised work orders that are available for your review are listed at the top of the page, and details about the work order are displayed in the lower portion of the page.
2. To view the details of a work order, choose its work order ID in the list at the top of the page.
3. The Current and New columns highlight the changes that have been made to the original work order. Both native and custom fields are highlighted.
4. Choose [Accept](#) or [Decline](#) to inform that buyer of acceptance or rejection of the work order revisions.

## 4.7 Resending Worker Invitations

When a work order is activated, the SAP Fieldglass registration emails are sent to the email address listed on the work order.

### Context

Registration emails expire after 21 days. If the registration code expires or the worker has misplaced the email, you can send the worker a new one. You should view the work order and determine whether the worker's email address was entered correctly. If you need to update the worker's email address, choose [Edit Work Order](#) on the Work Order page.

To resend a worker invitation:

## Procedure

1. From the home page, select the [Worker](#) menu and choose [Work Order](#). If the worker hasn't registered, no worker record is displayed.
2. To view the details of a work order, select the work order ID.
3. Choose [More Actions](#) and select [Resend Invitation](#).
4. The [Register on behalf of Worker?](#) flag provides the option to register the worker using your supplier email address. By default, the flag is set to [No, the worker will self-register](#) and uses the worker's email address for registration. To register with your supplier email address on behalf of the worker, use the slider to select [Yes, I will register this Worker](#) and enter your supplier email address.
5. Verify the worker's email address and choose [Send](#). A new registration email is sent to the worker. When you resend an invitation, the original registration email is no longer active. If the worker attempts to register using the original invitation, the worker will receive an error message.

## 4.8 Updating Pay Rates

Depending on the buyer's configuration, you may be required to enter pay rates when you submit a job seeker or accept a work order.

### Context

Several methods for updating pay rates are available, depending on the type of rate used. If basic rates are used, you may be able to update the information directly from the work order. The work order needs to be in Confirmed status, meaning that the worker has registered their account in SAP Fieldglass.

To update pay rates directly from the work order:

## Procedure

1. From the home page, select the [Worker](#) menu and choose [Work Order](#).
2. To view the details of a work order, select the work order ID.
3. Choose [Actions](#) and select [Edit Pay Rate](#). If this option is not available, the buyer will need to initiate a work order revision. When the work order revision comes to you for acceptance, you can update the pay rate as necessary.
4. Edit the pay rates and choose [Update](#).

## 5 Time Sheets and Expense Sheets

Once your worker has registered in SAP Fieldglass and signed in to their account, they can begin submitting time sheets and expense sheets to track their time worked and expenses incurred, if applicable.

Time sheets are used to track workers' hours for their assignment at a buyer company. Once they've been approved by the buyer, invoices are created and submitted to the buyer for processing. Expense sheets are created and submitted to the buyer by the worker to track expenses, such as transportation or materials costs. Invoices are also required to be submitted to the buyer for expense sheets after they've been approved. In some cases, buyers will have automatic invoicing enabled, and invoices for time and expense sheets are created automatically. Otherwise, you'll need to create them yourself.

### 5.1 Viewing Time Sheets

You can view your workers' time sheets by navigating to the Time Sheet list view page.

#### Context

Time sheets in Draft status haven't been submitted by the worker and aren't listed in the default view. To view a list of Pending Approval or Invoiced time sheets:

#### Procedure

1. From the home page, choose the [Worker](#) menu and select [Time Sheet](#).
  - a. To view a list of draft time sheets, choose the Draft Time Sheets tab on the Time Sheet list view page.
2. Use the search options to locate the time sheets you want to view.
3. To view a specific time sheet, choose the time sheet ID.
4. Review the tasks that hours have been allocated against, along with the total billable and non-billable amounts.
5. Choose the Related tab to view any related documents in the system, such as the job posting, work order, or invoice.
6. When it has been approved by the worker's supervisor, a time sheet is ready for invoicing. Depending on the buyer's configuration, invoices are either created automatically or must be manually created by the supplier.

When a time sheet has been submitted, approved, and invoiced, the time sheet can't be rejected or adjusted. However, if an error is found, a revised time sheet can be created to adjust previously submitted hours.

## 5.2 Submitting Worker Time Sheets

Suppliers can submit time sheets from the SAP Fieldglass application on behalf of workers.

### Context

After time sheets are submitted by suppliers, they're routed for approval according to the approval group that has been set up by the buyer.

To submit time sheets for a worker:

### Procedure

1. From the home page, select the *Worker* menu and choose *Time Sheet*.
2. From the Time Sheet list view, select the *Draft Time Sheets* tab.
3. Choose a time sheet from the list.
4. Select the *Edit* button.
5. Enter the worker's time for that time period.
6. Select *Submit*.

### Results

After taking these steps, the worker's time sheet is submitted to the buyer for approval.

## 5.3 Expense Sheets

Expense sheets are required for reporting worker expenses for reimbursement.

If a buyer has authorized a worker's assignment for expense sheets, they can bill expenses for travel or other items by submitting an expense sheet. These expenses are generated using the expense codes created by the buyer.

### Expense Sheet Workflow

A typical workflow for expense sheets includes the following steps:

1. Workers enter expenses using expense types, such as per diems, miles, or units that were previously agreed upon by the buyer and supplier, and then submit the expense sheet.
2. Depending on the buyer's configurations and setup, expense sheets may be routed to you before being sent to the buyer, or may be routed directly to the buyer. Expense sheets can be reviewed, edited, or rejected.
3. Supervisors or other approvers review and approve the expense sheet.
4. If other approvals are required for the approval process, the expense sheet continues to be routed through the appropriate approval group.
5. The expense sheet is processed for payment by the buyer.
6. If necessary, you or the worker can revise expense sheets that have been invoiced.

## 5.4 Reviewing Expense Sheets

If allowed by the buyer's configuration, workers can submit expense sheets for review and approval.

### Context

To view a list of all expense sheets:

### Procedure

1. From the home page, select the [Worker](#) menu and choose [Expense Sheet](#). The supplier's Expense Sheet List displays expense sheets for the time period specified in the [Period](#) fields.
2. Use the search options to display the expense sheets you want to view.
3. To view a specific expense sheet, choose the expense sheet ID.
4. To download a PDF of the expense sheet, choose [Actions](#) [Print](#) from the Expense Sheet Details page.
5. Choose the Related tab to view any related documents in the system, such as the job posting, work order, or invoice.
6. When it has been approved by the worker's supervisor, the expense sheet is processed for payment by the buyer.

## 5.5 Submitting Worker Expense Sheets

Suppliers can submit a worker's expense sheets by navigating to the Expense Sheet list view page.

### Context

When the [Supplier review on expense sheets](#) configuration is enabled, suppliers can submit expense sheets that are in Draft status.

To submit an expense sheet for a worker:

### Procedure

1. From the home page, select the [Worker](#) menu and choose [Expense Sheet](#).
2. Select the expense sheet ID link for the expense sheet you want to submit.
3. Choose the [Edit](#) button.
4. If you need to add or edit any expense information on the expense sheet, select one of the expense codes highlighted in blue to make changes to it.
5. Fill in the necessary expense details, such as the [Merchant](#) or the date.
6. Choose [Submit](#) once you're finished making changes.

### Results

After choosing [Submit](#), the expense sheet is submitted to the buyer for approval.

## 5.6 Expense Sheet Fields

When submitting expense sheets for workers, expense code information is displayed that categorizes expenses available for reimbursement to the worker.

Fields that you'll typically see when working with expense sheets include [Cost Center](#), [Expense Code](#), and [Expense Name](#).

Expense Sheet Fields

| Field Name  | Description                             |
|-------------|-----------------------------------------|
| Cost Center | The department charged for the expense. |

| Field Name             | Description                                                                                                        |
|------------------------|--------------------------------------------------------------------------------------------------------------------|
| Expense Code           | Expense codes assigned to you're available for selection.                                                          |
| Expense Name           | Displays the name of the expense based on the code selected.                                                       |
| General Ledger Account | If the buyer company is configured to use a general ledger account, the code appears in the list of expense codes. |
| Expense Type           | A description of the expense.                                                                                      |
| Billable               | Indicates whether an expense is billable or nonbillable.                                                           |

## 6 Worker Absence Notifications

Absence notifications can be created by you or a worker to inform the buyer that the worker won't be available on a certain date.

Before you can use this functionality, the following criteria must be met:

- You must have the required permission.
- The buyer must have enabled absences for the worker's job posting template.

This feature is for informational purposes only. When an absence is recorded, approval or acknowledgment isn't required, and the worker isn't prevented from submitting a time sheet that includes hours worked on a day when an absence is indicated.

# 7 Removing Absences

You can remove worker absences from time sheets or worker records at any time, as well as after their assignment has ended.

## Context

You must have the [Worker](#) > [Manage Worker Absences](#) user role permission to remove absences from a worker. To remove a worker's absence:

## Procedure

1. From the home page, select the [Worker](#) menu and choose [Worker](#).
2. Use the search options to locate the worker whose absences you wish to remove.
3. Choose the worker ID. Choose the worker ID.
4. Scroll to the bottom of the Worker page.
5. In the Accumulated Absences section, choose the [Remove](#) link for the absence you want to remove.
6. Select your [Reason](#) for removing the absence.
7. If needed, enter any comments about the absence.
8. Choose [Remove](#).

## 8 Viewing Absences

You can view a list of absences for a specified worker by using the Absences List page, or the Accumulated Absences section of their worker record or time sheet.

### Context

Workers can view only their submitted absences for the specified date range on the Absence List page. To view a list of all worker absences:

### Procedure

1. From the home page, select the [Worker](#) menu and choose [Absence](#).
2. Specify the date range for the absences you want to view.
3. Choose the worker ID.
4. Scroll to the bottom of the Worker page. A list of the absences accumulated by the worker is displayed.

## 9 Creating Absences

Absences allow you or a worker to inform a buyer that a worker is unavailable for a specified amount of time, which can be helpful when managing project timelines.

### Context

To notify a buyer that a worker is late or absent:

### Procedure

1. From the home page, select the [Worker](#) menu and choose [Worker](#).
2. Use the search options to locate the worker for whom you want to create an absence.
3. Choose the worker ID for the worker.
4. Choose [Actions](#).
5. Select [Create Absence](#) from the list that appears.
6. Specify the [Start Date](#) and [End Date](#) for the worker's absence.
  - a. If the worker is absent for one day, the [Start Date](#) and [End Date](#) should be the same.
  - b. If applicable, you can choose a future date.
  - c. At least one of the dates must be within the job posting or SOW period.
  - d. You can't record an absence for the same day more than once. If an absence has already been recorded for this worker and date, an error message is displayed.
7. Select a [Reason](#) for the absence.
8. If needed, enter comments to clarify the reason for the absence.
9. Choose [Submit](#).

### Results

An absence is created for the worker, and the buyer is able to view them for informational purposes.

# 10 Invoices

After time and expense sheets are submitted and approved, suppliers are responsible for creating invoices for them and submitting them to the buyer for approval.

You can configure SAP Fieldglass to support supplier invoicing in one of two ways:

- **Auto Invoicing On:** When auto invoicing is turned on, approved time and expense sheets automatically generates an invoice. No additional steps are required by the supplier. Suppliers can view invoices that have been created by selecting  [View](#)  [Invoices](#)  from the SAP Fieldglass desktop.
- **Auto Invoicing Off:** When auto invoicing is turned off, the supplier is responsible for creating invoices from approved time and expense sheets.

You can elect to turn on auto invoicing for time sheets only, expense sheets only, or both. When auto invoicing is turned on, a unique invoice is created for each individual time sheet and expense sheet. To simplify invoice processing, you can elect to create consolidated invoices. Consolidated invoices combine individual invoices based on buyer-defined criteria. When viewing invoices, suppliers can see that their invoices are in Pending Consolidation status. Suppliers don't need to take action on consolidated invoices. Individual invoices are consolidated by you and processed for payment.

If auto invoicing is turned off, you can still elect to consolidate supplier-submitted invoices to streamline payment processing. Occasionally, costs in addition to time and expenses need to be invoiced, such as expenses incurred to onboard a worker. You can also allow suppliers to create and submit miscellaneous invoices for processing.

It's important to note that the SAP Fieldglass system isn't an Accounts Payable application. The SAP Fieldglass application collects and processes the data related to an invoice. This data is sent to your Accounts Payable system for processing and payment. Questions regarding payments, or payment terms, should be directed to your company, not the SAP Fieldglass Customer Support Team.

## 10.1 Viewing Invoices

You can view invoices in any status after they have been created using the Invoices list view page.

### Context

Additionally, you can use the filters on this page to search for invoices based on criteria such as the supplier it's associated to, or the date it was submitted. When Auto Invoicing is turned on, or after Suppliers have created and submitted an invoice, you can view the status of the invoice on the Invoice List.

## Procedure

1. From the home page, select the [Payments](#) menu and choose [Invoice](#).
2. Use the search options to locate the invoices you want to view.
3. To change the date range of invoices displayed, enter the range of dates to view and choose the [Search](#) button.
4. To view a specific invoice, choose the invoice ID.
5. Review the invoice details. Use the link provided to view the time sheet or expense sheet that generated the invoice.
6. Choose the Related tab to view any related documents in the system, such as the job posting or work order.

## 10.2 Creating Invoices

If a buyer doesn't use auto invoicing, it's the responsibility of the supplier to create and submit invoices to the buyer for processing. Invoices can be created for time sheets and expense sheets that are in an Approved status.

### Context

Suppliers can only submit invoices for an established invoice billing schedule. Invoice billing schedules are created by the buyer, and suppliers are associated to a specific schedule. This schedule allows for proper processing of invoices.

The Invoice Generator enables suppliers to create multiple worker invoices at one time. Invoices can contain time or expense sheets. Only one invoice can be generated per worker, but each invoice can contain multiple time or expense sheets.

## Procedure

1. Choose the Create menu and select [Invoice](#) from the Payments section. The Invoice Generator page is displayed with a list of the schedules that are available for you to submit invoices against. If an invoice billing schedule isn't displayed, contact your buyer for instructions.
2. From the options displayed, select the appropriate schedule.
3. Select the check boxes next to the workers for whom you want to create an invoice.
4. Choose [Next](#).
5. Select the check boxes next to the individual line items you want to include in the invoices. By default, all available items are selected. To remove an item, clear the related check box.

6. For each invoice, enter an [Invoice Code](#) if needed. An invoice code may be displayed by default. The invoice code should be a unique identifier for the invoice. For example, the invoice code could be related to a reference number from your internal payroll system.
7. Choose [Continue](#). The invoices that have been created are listed at the top of the page. To review detailed information about an invoice, select the invoice in the Generated Invoices Ready for Creation list. If necessary, choose [Edit](#) to edit an invoice.
8. Choose [Submit](#) at the bottom of the page to submit all the selected invoices.

After taking these steps, the Invoice Generator page is displayed and the invoices are submitted to the buyer for processing. You can view the status of the invoice by choosing ► [View](#) ► [Invoice](#) ► from the menu bar.

## 10.3 Creating Miscellaneous Invoices

Miscellaneous invoices can be used for any additional preapproved costs beyond hours worked or preapproved expenses.

### Context

If supported by the buyer's configuration, the supplier is responsible for submitting a miscellaneous invoice in SAP Fieldglass for additional costs. Miscellaneous invoices are reviewed and approved by the buyer before being processed for payment.

All miscellaneous invoices are associated to a worker. When creating a miscellaneous invoice, you must first select the related worker. The miscellaneous invoice is routed to the buyer for review and approval. If the miscellaneous invoice is rejected, it's returned to you. You can update and resubmit or cancel rejected miscellaneous invoices.

### Procedure

1. Choose the Create menu and select [Miscellaneous Invoice](#). The Create Miscellaneous Invoice page is displayed, which shows a list of workers who are available for you to submit miscellaneous invoices against.
2. Choose the worker ID that is related to the miscellaneous invoice you're creating.
3. Enter a unique code in the [Miscellaneous Invoice Code](#) field. This code is used to identify this miscellaneous invoice and can be mapped to your internal system, if needed.
4. Select a [Miscellaneous Reason](#) code and enter the associated [Amount](#). Miscellaneous Reason codes are defined by the buyer.
5. Select an [Adjustment](#) code, if applicable, and enter the associated [Amount](#). Adjustments are typically any tax items associated with this invoice.
6. Add additional information in the [Comments](#) field in the General Information section, if applicable.

7. Choose [Add Attachments](#) in the Attachments section to attach supporting documents for the incurred costs, if desired.
8. When all required fields are complete, choose [Continue](#).
9. Review the summary and choose [Submit](#) when finished.

## 10.4 Revised Miscellaneous Invoices

The Revised Miscellaneous Invoice feature provides a way to correct errors on contingent worker miscellaneous invoices that have been approved. When you submit a revision, the system automatically generates a reversed document and a revised document. Both documents are linked to the original invoice for full traceability.

### Restrictions

- Revisions are not supported for miscellaneous invoices that contain accruals, whether buyer-created or supplier-created. Only standard contingent worker miscellaneous invoices are eligible for revision.
- This feature is available for contingent workers only. SOW workers are not in scope.
- For a supplier to revise a miscellaneous invoice, the buyer must have the [Miscellaneous Invoice](#) company configuration enabled.
- The supplier user must have the ► [Miscellaneous Invoice](#) ► [Revise](#) ► user role permission. This is a new permission; it must be explicitly granted by the supplier administrator.
- A reason code is required when initiating a revision. The buyer must configure reason codes for the [Miscellaneous Invoice](#) module Revised type before suppliers can complete revisions.

### What Happens When You Revise a Miscellaneous Invoice

When you submit a revision, the system automatically creates two new documents linked to the original:

- A **reversed** document is generated automatically. The financial data on the reversed document is system-generated and not editable. You can edit the [Comments](#) and custom fields on the reversed document.
- A **revised** document is submitted for approval. It goes through the same approval process as the original miscellaneous invoice.

Once the revised document is approved, the original, reversed, and revised documents remain linked for audit and traceability purposes. Both the reversed and revised documents will have the same status. The standard integrated workflow for miscellaneous invoices then continues.

## 10.5 Creating Miscellaneous Invoice Revisions

Depending on the buyer's configuration and your user role permissions, you can revise miscellaneous invoices that have been approved.

### Prerequisites

- The buyer must have the [Miscellaneous Invoice](#) company configuration enabled.
- You must have the [► Miscellaneous Invoice ► Revise ►](#) user role permission. If you do not see the Revise option in the Actions menu, contact your supplier administrator to request the permission.
- The buyer must have configured reason codes for the Miscellaneous Invoice module type Revised. If no reason code appear for selection, contact your buyer administrator.
- The invoice must be a standard contingent worker miscellaneous invoice. Invoices containing accruals cannot be revised.

### Context

### Procedure

1. Navigate to the miscellaneous invoice list and locate the invoice to be revised.
2. Open the invoice and select [Revise](#) from the [Actions](#) menu.
3. Select a [Reason](#) from the available options.
4. Add, delete, or modify values on applicable line items.
5. Select [Submit](#).

### Results

The system automatically generates a reversed document and a revised document and links both to the original invoice. The revised miscellaneous invoice is submitted for approval. The revised document goes through the same approval process as the original miscellaneous invoice. Once approved, the original, reversed, and revised documents remain linked for audit and traceability purposes.

After a miscellaneous invoice has been revised, you can review the original, reversed, and revised documents by navigating to the Miscellaneous Invoice list view and selecting the desired invoice. A toggle at the top of the [Details](#) tab allows you to switch between the original, reversed, and revised documents.

### Note

You can edit the [Comments](#) or custom fields on the reversed document. However, the financial data on the reversed document is system-generated and not editable. Financial data can only be modified on the revised document.

## 10.6 Correcting Approved Time Sheets and Expense Sheets

You can make corrections to time and expense sheets that have already been submitted by using the revision functionality.

### Context

Two methods are available to correct inaccurate time or expense sheets after invoices have been generated:

- **Revised Time Sheet:** A revised time sheet allows a worker or supplier user to make corrections to a time sheet that has been invoiced. A new revised time sheet is sent to the buyer for approval. A system-generated reversal time sheet is created to counter the original incorrect time sheet.
- **Revised Expense Sheet:** Revised expense sheets allow suppliers or workers to make corrections to invoiced expense sheets. When a revised expense sheet is submitted, two expense sheets are created: the revised expense sheet that has all of the corrected data, and a reverse expense sheet that backs out all of the entries in the original expense sheet.

The decision to use the revised time sheet functionality is made by the buyer and displays on the [Actions](#) button on invoiced time sheets.

## 10.7 Revised Time Sheets

The Revised Time Sheet feature provides a simplified method for you or a worker to correct errors on time sheets that have been approved and invoiced.

Depending on the buyer's configuration and setup, you can add, remove, or edit all hours or units on revised time sheets, as well as make other changes such as adding task codes or reallocating time. By creating a revised time sheet with the correct information, the necessary adjustments, such as debits or credits, are calculated and applied by the SAP Fieldglass application. Additionally, revised time sheets can be used to quickly process retroactive rate changes. Based on the company configuration options selected by the buyer, revised time sheets can be created by contingent workers, SOW workers, and suppliers.

When completing a time sheet revision, you must specify a reason for the revision. Reason codes for revising time sheets must be created by the buyer before you or a worker can complete a revision.

When a revised time sheet is submitted, two time sheets are created: the revised time sheet that has all of the corrected data, and a reverse time sheet that backs out all of the entries in the original time sheet. The revised

time sheet goes through the same approval process as the original time sheet. The reverse time sheet doesn't need approval, as it inherits the status of the revised time sheet.

When you create an invoice for the revised time sheet, the reverse time sheet is automatically included on the invoice. When the invoice is processed, the reverse time sheet backs out the effects of the original time sheet, and the revised time sheet charges for the hours worked in the time period. Reverse and revised time sheets, although separate, always travel together and can be referenced from their respective Related tabs.

## 10.8 Creating Revised Time Sheets

Depending on the buyer's configuration, workers and suppliers can revise time sheets that have been invoiced. You can add, remove, or edit all hours or units, as well as make other changes such as adding task codes or reallocating time.

### Context

When completing a time sheet revision, the user must specify a reason for the revision. Reason codes for revising time sheets must be created by the buyer before a worker or supplier can complete a revision.

When a revised time sheet is submitted, two time sheets are created: the revised time sheet that has all of the corrected data, and a reverse time sheet that backs out all of the entries in the original time sheet. The revised time sheet goes through the same approval process as the original time sheet. The reverse time sheet doesn't need approval, as it inherits the status of the revised time sheet.

When the supplier invoices the revised time sheet, the reverse time sheet is automatically included on the invoice. When the invoice is processed, the reverse time sheet backs out the effects of the original time sheet, and the revised time sheet charges for the hours worked in the time period. Reverse and revised time sheets, although separate, always travel together and can be referenced from their respective Related tabs. The Revisions tab shows all approved revisions for the time sheet, as well as the revision number, status, and reference IDs. Additional key details about the time sheet are also shown on this page, such as the reason for the revision and the submit date.

To revise a time sheet:

### Procedure

1. From the home page, select the [Worker](#) menu and choose [Time Sheet](#).
2. Choose the time sheet ID you want to correct.
3. Choose [Actions](#) and select [Revise](#).
4. Make the necessary corrections to the time sheet.
5. Select a [Reason](#) for the revisions. Revised time sheet reason codes are added by the buyer.
6. Choose [Submit](#).

7. Choose [OK](#).

The revised time sheet is submitted for approval and is assigned a new ID number with an associated revision number, and a reverse time sheet is automatically created. The Related tab on the time sheet detail lists the original, the revised, and the reverse time sheets.

# 11 Statements of Work

Statements of work are a contract between a buyer and supplier company, and are typically used for larger, ongoing projects outside of the scope of a single job posting.

Unlike standard job postings where individual workers are hired against a job posting, multiple workers can be hired against an SOW, and can cover a broad range of services and contractual agreements.

Similar to a work order, suppliers must accept the SOW in SAP Fieldglass. Invoicing rules for statements of work are defined in the SOW. SOWs can be created to pay workers based on time sheets or based on events/ payment milestones. For example, invoices can be generated after a certain amount of time has passed, or when specific deliverables are completed.

## 11.1 Reviewing a Statement of Work

After a statement of work has been created by a buyer and sent to you for approval, you can review the terms outlined in the statement of work before deciding to proceed further.

### Context

Reviewing an SOW allows buyers and suppliers to negotiate the terms of the SOW using the SAP Fieldglass application.

### Procedure

1. From the Work Items icon, choose [Review](#) in the Statement of Work section.
2. To view the details for an SOW, select the SOW ID from the list on the Statement of Work Items page. The information related to the SOW is organized using several tabs.

#### SAP Fieldglass Statement of Work Tabs

| SOW Tab Name | Description                                                                                                                                                    |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Details      | The <b>Details</b> tab contains detailed information about the SOW. [AV1] Review this information before responding, accepting, or declining an SOW.           |
| Clauses      | The <b>Clauses</b> tab contains legal and contractual information for the SOW. For example; liability, indemnity, and confidentiality clauses can be included. |

|                 |                                                                                                                                                                                                                                                                                                                               |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manage          | The <b>Manage</b> tab displays activity items.                                                                                                                                                                                                                                                                                |
| Characteristics | The <b>Characteristics</b> tab displays information about events, schedules, and fees.                                                                                                                                                                                                                                        |
| SOW Workers     | The <b>SOW Workers</b> tab displays a list of workers defined as SOW Workers, including rules, rates, and roles.                                                                                                                                                                                                              |
| Time & Expense  | The <b>Time &amp; Expense</b> tab contains time sheet and expense sheet information.                                                                                                                                                                                                                                          |
| Lookup Data     | <p>The Lookup Data tab gives a summarized view of the custom lookups associated with a statement of work. It displays when any of the following lookups are being used on a statement of work:</p> <ul style="list-style-type: none"> <li>• Fee Library</li> <li>• Fee with SOW Workers</li> <li>• Event Hierarchy</li> </ul> |
| Related         | The <b>Related</b> tab displays documents related to the SOW, such as a work order.                                                                                                                                                                                                                                           |

3. Choose [Respond](#) to review the statement of work.
4. Choose [Continue](#) once you've reviewed all of the information on the Details and SOW Workers pages, if applicable.

If the SOW is supplier defined or buyer and supplier defined, you may have options to add additional characteristics to it, such as events or schedules. Additionally, you may be able to add SOW worker roles and rates while responding to the SOW, depending on the buyer's configuration.

5. Review the SOW details again once you've navigated to the Review page. Once you're finished, choose [Submit](#) to send your response back to the buyer.

## Results

After choosing [Submit](#), the SOW moves to Pending Buyer Review status.

## 11.2 Declining a Statement of Work

If the terms outlined in the statement of work aren't suitable for your organization, or you feel information is missing or incorrect, you can decline a statement of work and send it back to the buyer for review.

### Context

To decline a Statement of Work:

## Procedure

1. From the Work items menu, choose the [Accept](#) link in the Statement of Work section.
2. To view the details for a statement of work, select the statement of work ID from the list.
3. Choose [Decline](#).
4. Select a [Reason](#) for declining the statement of work. Reason codes for declining a statement of work are added and maintained by the SAP Fieldglass supplier administrator.
5. Enter any additional information in the [Comments](#) field if necessary.
6. Choose [Decline](#).

## Results

The buyer is notified that you've declined the statement of work.

### 11.2.1 Accepting a Statement of Work

Once you've reviewed a statement of work and determined that the terms are appropriate for your organization, you can accept the statement of work using your Work Items menu.

## Context

When an SOW has been finalized, it must be accepted by the Supplier for approval. Take the following steps to accept a statement of work:

## Procedure

1. From the [Work Items](#) icon, choose the [Accept](#) link in the Statement of Work section. SOWs are listed as line items within the Your Work Items > Statement of Work page. The details of the selected statement of work are displayed below the list.
2. To view the details for an SOW, select its SOW ID from the list.
3. Choose [Accept](#).
4. Enter the requested SOW information.
5. Enter a unique code in the [Supplier Reference](#) field.
6. Optionally, select your billing address in the [Default Remit-To Address](#) menu.
7. Enter additional information in the [Comments](#) field if necessary.
8. Choose [Add Attachments](#) to attach supporting documents, if desired.

9. Choose [Continue](#).
10. Review details of the SOW. Choose [Next](#) to review each page that is displayed.
11. Choose [Submit](#) to send your acceptance of the statement of work to the buyer.

## Results

After submitting your response, the statement of work moves to Response Pending Approval status.

## 11.3 Responding to SOW Bids

Buyers can create and send SOW bids for review before creating a statement of work. They can send bids to multiple suppliers to compare responses. Respond by reviewing and editing clauses, characteristics, and answering buyer questions before submitting.

## Context

SOW bids are non-transactional and are used to negotiate the terms of a statement of work before it's created by the buyer. Buyers can send SOW bids to multiple suppliers at once, which allows them to review several different supplier responses to determine which one best fits their business needs.

### Note

If the buyer has defined a response due date for the bid, the supplier cannot decline the bid or respond to it after the due date has passed.

## Procedure

1. Choose the [Services](#) dropdown menu from the vertical navigation menu, then choose [SOW Bid](#).
2. Choose the SOW bid ID that you want to respond to from the SOW bid List View page. You can view the details of the SOW bid by navigating through the different tabs.

### SAP Fieldglass SOW Bid Tabs

| SOW Bid Tab Name | Description                                                                                                                                            |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Bid Response     | The Bid Response tab shows the details about your SOW bid response, such as any characteristics you've added, or if you've updated the maximum budget. |

|                       |                                                                                                                                                                                                                                                 |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Details               | The Details tab contains detailed information about the SOW bid, such as the business unit, rules, and whether or not the SOW bid is billable. Review this information before responding to the SOW bid.                                        |
| Clauses               | The Clauses tab contains legal and contractual information for the SOW bid. For example; liability, indemnity, and confidentiality clauses can be included. You can review and edit the clauses here, or when submitting your SOW bid response. |
| Characteristics       | The Characteristics tab displays information about events, schedules, and fees on the SOW bid.                                                                                                                                                  |
| Questions             | The Questions tab displays any questions submitted by the buyer on the SOW bid. You can answer these questions when submitting your SOW bid response.                                                                                           |
| Approvals/Audit Trail | Displays information about actions taken on the SOW bid, such as approvals or edits.                                                                                                                                                            |
| Related               | The Related tab displays documents related to the SOW bid.                                                                                                                                                                                      |

3. Choose [Respond](#) to begin responding to the SOW bid.
4. Review details of the SOW bid, such as the clauses and the characteristics. If the buyer configures the [Maximum Budget](#) to be supplier defined, you can also enter the maximum budget amount for the SOW bid.
5. Choose [Continue](#) to navigate to the Clauses page, where you can review and edit the clauses. You can edit the [Section Collaborator](#), [Category](#), [Clause](#), and [Documents](#) fields on this page. Choose [Continue](#) again to navigate to the Characteristics page.
6. You can review any characteristics added to the SOW bid by the buyer on the Characteristics page. If the SOW bid is buyer and supplier defined, or supplier defined, you may be able to add characteristics to the SOW bid, such as events or schedules. Choose [Continue](#) to navigate to the Review page.
7. If the buyer added any questions for you to answer, you can choose the [Answer Questions](#) button on the Review page to view them. Choose the question you want to answer in the Section menu, then choose [Edit](#) to enter your answer, then choose [Update](#) to submit them. Once you've submitted all of your answers, choose the [Edit](#) button near the top of the SOW bid to navigate back to the Review page if necessary. Alternatively, you can choose [Submit](#) if you're finished reviewing the SOW bid response and are ready to submit it to the buyer.
8. Once you're finished answering any questions from the buyer and reviewing the SOW bid details, choose **Submit** to send your response back to the buyer.

## Results

After choosing **Submit**, the SOW bid moves to Submitted status.

## 11.4 Creating Fees

Fee characteristics are defined by the buyer and can be used on statements of work to track expenses submitted by your organization during the course of the project.

### Context

Depending on the payment terms defined in an SOW, you can submit fees when certain items are used. Fees are consumption based, such as brochures printed, help desk calls received, or classes taught, so you only invoice what you actually use. To create a fee:

### Procedure

1. From the home page, select the [Services](#) menu and choose [Statement of Work](#)..
2. To view the details for an SOW, select the SOW ID.
3. Choose [Actions](#) and select [Create Fee](#).
4. Enter the requested information about the fee:
  - a. Enter the [Effective Date](#) of the fee.
  - b. In the Fee section, choose [Add Fee](#) and select the appropriate fee name.
  - c. Add a [Description](#), if necessary.
  - d. Enter the number of [Units](#). SAP Fieldglass automatically calculates the Amount as the number of units times the displayed rate.
  - e. Enter additional information in the [Comments](#) field, if desired.
  - f. Choose [Add Attachments](#) to attach supporting documents, if desired.
5. Choose [Continue](#).
6. Review the information and choose [Submit](#).

### Results

The Statement of Work Characteristics page is displayed, and the fee is created. When the fee has been created, you must create an invoice. Refer to Creating SOW Invoices for more information.

## 11.5 Submitting an Event

Events are payment characteristics on a statement of work that indicate significant work milestones which require payment when the associated item or deliverable is finished. When a buyer includes event

characteristics on an SOW, you complete them from the SOW Characteristics tab to send them for buyer review and invoicing.

## Context

You need the ► [SOW Line Item](#) ► [Submit](#) ► user role permission to mark events as complete and submit them for buyer approval. Take the following steps to submit an event:

## Procedure

1. Navigate to the SOW and choose the Characteristics tab to view the events.
2. Choose the event you want to submit, then choose [Go to Details](#).
3. Choose [Mark as Complete](#).
4. Enter the [Completed Date](#).
5. If the buyer has configured the SOW to allow you to adjust the event amount, you can edit the value in the [Final Terms](#) field.
6. If the buyer configuration on the SOW allows you to manage cost allocation, you can add cost centers to the event when marking it as complete.
7. Choose [Submit](#).

## Results

The event is submitted to the buyer for approval. If the buyer has automatic invoicing enabled, invoices are automatically generated for the approved event. Otherwise, you'll need to manually create an invoice.

## 11.6 Itemizing an Event

When the *Supplier can create multiple events from a single event* rule is enabled on the SOW template, you can split a parent event into multiple child events that cover a portion of the total event amount.

### Context

This is useful when work is completed in phases, or when different amounts apply across locations or tax jurisdictions. To itemize an event, take the following steps:

### Procedure

1. Navigate to the statement of work (SOW) and choose the Characteristics tab.
2. Search for the event, then choose the *Go to Details* link to navigate to the event Details page.
3. Choose the *Itemize* button.
4. Enter a name for the child event. The child event defaults to the parent event name, but must be changed before you can continue as duplicate names aren't permitted.
5. Enter the *Completed Date* and *Amount* for the child event. The *Amount* can't exceed the *Remaining Spend* value from the parent event.
6. Add cost centers if necessary.
7. Choose *Submit*.

### Results

The child event is submitted to the buyer for approval. If the buyer has automatic invoicing enabled, invoices are automatically generated for the approved event. Otherwise, you'll need to manually create an invoice.

## 11.7 Responding to Buyer-Defined Schedules

You can respond to schedule characteristics on statements of work using the SOW Characteristics tab and selecting the name of the schedule.

### Context

Depending on the payment terms defined in the statement of work, you can submit schedules or dollar amounts related to a specific date. For example, you can submit a weekly service fee, a monthly on call fee, or service level agreements.

### Procedure

1. From the home page, select the [Services](#) menu and choose [Statement of Work](#).
2. To view the details for a statement of work, select the SOW ID.
3. Choose the Characteristics tab.
4. In certain cases, the buyer can set pre-defined schedules. It's the responsibility of the supplier to respond to the schedule before an invoice can be created. Choose the [Name](#) link for the desired schedule.
5. Choose [Respond](#).
6. Update the [Final Terms](#) and add comments, if necessary.
7. Choose [Add Attachments](#) to attach supporting documents, if desired.
8. Choose [Continue](#).
9. Choose [Submit](#).

### Results

The schedule is submitted to the buyer for approval.

## 11.8 Adding Supplier-Defined Schedules

Depending on the buyer's configuration, you may be creating your own schedule characteristics and submitting them to the statement of work.

### Context

To create a schedule:

### Procedure

1. From the home page, select the [Services](#) menu and choose [Statement of Work](#).
2. To view the details for a statement of work, choose its ID.
3. Choose [Actions](#), then choose [Add Schedule](#).
4. Enter the [Name](#) and [Due On](#) date for the schedule.
5. Enter the [Amount](#) of the schedule.
6. Choose [Submit](#).

### Results

The schedule appears in Created status until it's submitted to the buyer for approval.

## 11.9 Submitting an Existing SOW Worker to a Statement of Work

Some statements of work require you to add SOW workers to them based on the project requirements. You can submit new SOW workers or select workers from your existing workforce in the SAP Fieldglass application.

### Context

In certain scenarios, you may need to add workers to an SOW. The exact method of adding SOW workers is based on the buyer's configuration and SOW setup.

## Procedure

1. From the home page, select the [Services](#) menu and choose [Statement of Work](#).
2. Select the desired SOW by selecting the SOW ID.
3. Choose [Actions](#) and select [Add SOW Worker](#).
4. Select the correct [Role](#) for the new worker. Depending on the role selected determines the fields displayed in the Details section.
5. Choose [View Workforce](#). This is located under the Details section in a shaded area called [Search Existing Workforce](#). Selecting this button displays a modal on the side of the page asking if the existing worker record is active and currently on a statement of work. A selection of Yes displays a list of active SOW workers; a selection of No allows you to search all workforce records to determine if an individual has been previously submitted before creating a new SOW worker. You can preview a profile of each individual by selecting the information icon then select an individual to populate their information.
6. Complete any remaining fields.
7. Choose [Add](#).

## Results

The SOW worker is added. You can view the workers who are associated with a statement of work by choosing the SOW Workers tab on the statement of work.

## 11.10 Submitting a New SOW Worker to a Statement of Work

Some statements of work require you to add SOW workers to them based on the project requirements. You can submit new SOW workers or select workers from your existing workforce in the SAP Fieldglass application.

## Context

In certain scenarios, you may need to add workers to a statement of work. The exact method of adding SOW workers is based on the buyer's configuration and statement of work setup.

## Procedure

1. From the home page, select the [Services](#) menu and choose [Statement of Work](#).
2. Select the desired statement of work by selecting the SOW ID.
3. Choose [Actions](#) and select [Add SOW Worker](#). Selecting this action accesses the Add SOW Worker page where you can add new SOW worker, add an existing workforce record, or add an active SOW worker.

4. Select the correct [Role](#) for the new worker.
5. Complete the fields as requested. The fields that are displayed are based on the buyer's configuration and statement of work setup.
6. Choose [Add](#).

## Results

The SOW worker is added. You can view the workers who are associated with a statement of work by choosing the SOW Workers tab on the statement of work.

## 11.11 Supplier SOW Dashboard

You can view key details about your statements of work using the SOW Dashboard feature and the My Statements of Work card on your Home page.

My Statements of Work Card

### Navigation

Choose the **Go to Statement of Work Dashboard** button on the My Statements of Work card on the Home page to navigate to the dashboard. You can also use the **My Items My Statements of Work** and **Services Dashboard** links from the navigation menu to access the SOW Dashboard.

### Functionality

The My Statements of Work card displays SOW names, IDs, and statuses. If the buyer that created an SOW has the PMO Dashboard configuration enabled, SOW health is displayed for their SOWs in the card. SOWs are displayed based on your business unit, site, and account associations.

## SOW Dashboard

### Filters

You can use the [My Account](#), [Favorite](#), and [All](#) filters to choose which SOWs are displayed on the SOW Dashboard. SOW activity items, SOW worker activity items, and SOW line items that meet the criteria set by the buyer are highlighted, making it easier for you to focus on the most time sensitive details for your SOWs.

- [My Account](#): SOWs that are associated to your account.
- [Favorite](#): SOWs that you've favorited, or that another user has favorited for you.
- [All](#): SOW for your permitted business unit and site associations.

### Cards

The SOW Activity Items, SOW Worker Activity Items, and SOW Line Items are present by default on the SOW Dashboard. If the [Worker Ending Soon](#) Monitor Threshold is enabled, the Upcoming SOW Worker End Dates

card is also displayed on the dashboard. Additionally, if the **Buyer and supplier can change SOW worker dates without a revision** company configuration is enabled by the buyer, and the **Can shorten worker end date** or **can extend worker end date** rules are enabled on the SOW, then you can use the SOW Dashboard to extend or shorten worker end dates.

Similar to the My Statements of Work card, each card on the SOW Dashboard shows the health of the items that triggered the alert if the [PMO Dashboard](#) configuration is enabled by the buyer. The PMO thresholds set by the buyer determine the alert levels for items in the My Statements of Work Home page card and the Statement of Work Dashboard. Use the [Worker Ending Soon](#) and [Past Worker End Dates](#) monitor thresholds to configure the health levels for the Upcoming SOW Worker End Dates card.

## Counts

If more than 100 items in a card triggered an alert for an SOW, a link displays which you can choose to navigate to the activity items list view to see the whole list.

# 11.12 Creating SOW Invoices

You're required to create invoices for characteristics and time sheets on the statement of work when auto-invoicing isn't enabled.

## Context

After specific payment characteristics are submitted and approved by the buyer, you can create an SOW invoice to collect payment for those items. To create an SOW invoice:

## Procedure

1. From the Create menu, choose [SOW Invoice](#) in the Payments section.
2. Select the desired statement of work by selecting the SOW ID.
3. Enter an [Invoice Code](#). The invoice code is a unique number for the invoice and can relate to your internal invoicing system.
4. Select the items to include on the invoice by placing a check in the desired check boxes. To remove items, clear the related check boxes. Only approved items for the specific statement of work are available for selection.
5. Choose [Continue](#).
6. Enter the requested information about the SOW invoice:
  - a. Select [Adjustments](#), if necessary.
  - b. Choose [Add Attachments](#) to attach supporting documents, if desired.
  - c. Enter comments if desired.
7. Choose [Continue](#).

8. If the information shown is correct, choose [Submit](#).

## Results

The SOW Invoice is created and routed to the buyer for processing.

# 12 Workforce

You can use the workforce list to enter and manage an internal talent pool of available workers.

Buyers can browse your company's list of available workers. If they see a worker that's appropriate for an open assignment, they can create a job posting specifically for an individual from your workforce records.

## 12.1 Creating a Workforce

Adding workers to your workforce provides you with a quick option for submitting candidates to job postings as they become available.

### Context

To add a person to the workforce:

### Procedure

1. Choose the Create menu and select [Workforce](#).
2. Complete the required fields.
  - a. Enter Profile and Contact information for the individual. In order to be able to use radius search criteria when searching workforce records, you must select a city, state/province, and country combination from the drop-downs.
  - b. Choose [Attach](#) to attach a resume or CV.
  - c. Select [Yes](#) in the [Visible to all Buyers?](#) field to allow the buyer to see this workforce entry. If you would only like to make this option available to one or some buyers, use the [Selected Buyers](#) selection to indicate the specific buyers.
3. Choose [Add or Remove Qualification](#) in the Qualifications section.
4. Search for a qualification you want to associate with the individual and select the check box next to the qualification.
5. Choose [Add Selected](#) to add the selected qualification to the Selected Qualifications list. Choose [Add Selected](#) to add the selected qualification to the Selected Qualifications list.
6. If desired, search for additional qualifications and add them to the Selected Qualifications list.

During workforce record creation, the system scans the SAP Fieldglass Unified Qualification Library for potential matches after qualifications are added and alerts the user if any are found. Click [Consolidate Qualifications](#) to merge and align matches.

If a qualification on a workforce record matches one on a Job Posting but uses a different scale or point system, SAP Fieldglass normalizes the workforce record's scale to match the job posting.

Any assessment ratings entered during workforce creation are preserved and shown after consolidation. Once the record is saved, qualifications are permanently consolidated.

7. Choose [Update](#). Choose [Update](#).
8. To attach supporting documents, choose [Add Attachments](#) in the Attachments section.
9. When all the information on this page is complete, choose [Continue](#).
10. If the information shown is correct, choose [Submit](#).

When you've created a workforce, you can submit members of the workforce to job postings in your work items by choosing [Submit Existing](#) on a job posting.

## 12.2 Viewing and Editing a Workforce

You can view your entire list of workforce records on the Workforce list view page and edit them as needed.

### Context

Workforce records are candidate profiles that your company maintains in SAP Fieldglass. A workforce record is automatically created when you submit a person as a job seeker to a buyer's prequalification template. Both you and the buyer can access the record from the Workforce list view.

#### Note

Suppliers control workforce record visibility and determine which buyers can view a workforce record. Buyers can view only workforce records that suppliers make available to them and cannot manage or modify workforce record visibility.

#### Caution

If the Workforce list is empty or the Workforce option does not display in the Worker menu, one of the following conditions may apply:

- The buyer you are working with hasn't enabled the Prequalify Workforce feature or hasn't set up any prequalification job posting templates.
- Your user role does not include the Workforce View permission.

Contact the buyer for confirmation about their prequalification setup, or ask your supplier administrator to verify that the Workforce View permission is enabled for your user role.

Take the following steps to access and edit your workforce records:

## Procedure

1. From the home page, select the [Worker](#) menu and choose [Workforce](#).
2. Use the search options to locate the workforce record you want to view.
3. Choose the workforce ID of the workforce you want to view.
4. Review the workforce details.
5. Choose the Related tab to view any documents in the system that are related, such as the job posting, work order, or invoice.
6. Choose [Actions](#) and select [Edit](#) from the list that appears.
7. Make all the necessary changes, update the workforce's qualifications, and attach all necessary documents.
8. Choose [Continue](#).
9. Choose [Update](#) to save the changes to the workforce.

# 13 Reports

SAP Fieldglass allows you to run reports which help you analyze data based on your organizations needs. For example, the number of workers nearing their end date or the number of invoices that have been submitted within a specified date range.

Many predefined reports are available in the SAP Fieldglass application. If you don't see a report that fills your needs, users with appropriate user role permissions can create custom reports. User access to specific reports can be controlled by your SAP Fieldglass supplier administrator.

## 13.1 Running a Predefined Report

Many predefined reports are available for you to use in SAP Fieldglass that capture data that suppliers typically find useful.

### Context

To run one of the SAP Fieldglass predefined reports, take the following steps:

1. Choose the Analytics menu and choose [All Reports](#).
2. Choose a report name that you wish to run.
3. Scroll through the report options and make all required filter selections. The report options displayed vary based on the specific report selected.
4. Select the report [Output Format](#).
5. Choose [Run](#). The report is displayed in the selected format. Depending on your internet browser, you may be prompted to download or save the report before you can open it.

## 13.2 SAP Fieldglass Supplier Standard Report List

You can access a list of predefined reports by navigating to the All Reports page under the Analytics menu.

SAP Fieldglass provides you with a number of standard reports you can use right away, which can be useful when reviewing workflow data for your company. For instance, you may be able to run a standard report on the number of draft time sheets for your workers, or the number of expense sheets created within a certain date range. User visibility to reports is controlled by the supplier administrator, therefore some users may not have access to all standard reports.

## 13.3 Multi-Supplier Tenant Reporting

You can have multiple tenants in SAP Fieldglass associated to different buyers. You can report on data from these separate tenants without having to log in to each separate one.

To support this need, supplier tenants can be linked through a system table from the back-end for the purpose of reporting across supplier tenants. Supplier tenants must be linked through a system table, and must be done by SAP Fieldglass.

When SAP Fieldglass has linked the supplier tenants, the user profile flag *Report on Linked Suppliers Data* displays on supplier users. You aren't able to edit this flag yourself. This flag determines which users within a supplier company can pull data across the linked supplier tenants for reporting. Users with this flag enabled are able to report on data across all the linked supplier companies only when the user is running the report from the instance where the flag is enabled. You don't need to have an account in the other instances in order to run the report across the linked companies.

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