SAP Fieldglass

INTERNAL – Authorized for SAP Customers and Partners
SAP Fieldglass

Welcome to SAP Fieldglass

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Content

1 Getting Started

This guide provides information for buyers and suppliers about using and personalizing SAP Fieldglass.

Here you can explore different settings and options in order to create an experience centered around your preferences and business needs.

Use the Table of Contents and Search bar to locate helpful information about setup, customization, and features within this guide.

Note that the options described in this guide are dependent on your company's configurations and your user visibility options.

1.1 What's New in This Guide

A summary of recent changes to the Setting up and Managing your SAP Fieldglass Experience guide.

Updated Date	What's New	More Information
May 2023	Updated the Chat topic to include information about the 'All Suppliers' tab availability for SOW Bids.	FGL-103721
May 2023	Added the 'Worker Centric View' topic.	FGL-113998
November 2022	Added the 'Vertical Navigation' topic and edited the 'Past Data' and 'Navigational Bars' topics.	FGL-95657
November 2022	Added information about case management and follow ups.	DOC-546
November 2022	Updated the Chat topic to include a description of the 'Supplier Chat Respond By Date' function.	FGL-112308
May 2022	Updated color theme choices in My Preferences topic.	
May 2022	Added 'Downloading Multiple Archived Documents to Your Browser' topic.	

Updated Date	What's New	More Information
November 2021	Updated the Chat topic to indicate that chat messages are now grouped by job posting and work order. Updated the Social Messages topic with changes to the Social Messages tabs. Updated the SOW Rules topic with changes to the **Can Supplier change the amount prior to invoicing the Schedule** and **Can Supplier change the amount when marking the Event as complete** rules.	
June 2021	This content has been updated with changes from the June 2021 release.	
November 2020	This content was updated with changes from the November 2020 release.	
July 2020	Initial publication to the SAP Help Portal.	

1.2 Your SAP Fieldglass Home Page

Familiarize yourself with the SAP Fieldglass Home page.

Once you've signed in to SAP Fieldglass, the Home page displays. You're prompted to take the Welcome Tour, which gives an overview of the Home page and information about how to navigate it. The link to the Welcome Tour appears by default. To remove it, select the "x" to the right of the link. You can still access the Welcome Tour through the **View help menu** icon in the header bar.

A link to the SAP Fieldglass Release Communication information displays under the Welcome Tour link. The Release Communication document contains information about new features and enhancements for the most current release. To remove it, select the "x" to the right of the link. You can still access the link through the **View help menu** icon in the header bar.

Widgets

By default, various widgets are displayed on the Home page to provide easy access to other areas of the application. These widgets, as well as several other widgets, can be hidden or displayed depending on your needs.

Two prominent widgets, **My Workers** and **My Statements of Work** allow you to request a worker or create a statement of work directly from the widgets. Once you create workers or statements of work, they're displayed here with a color-coded box to reflect their state. States include Good, Warning, and Critical. A green box indicates that the worker or statement of work is in a Good state, but may have pending items that require attention. A yellow box indicates a Warning state and that pending items may require attention in the near future. A red box indicates a Critical state and items currently require attention.

Menu Bars

Positioned at the top, the header bar gives you access to work items, messages, the feature switch, search, settings, and different configurations based on your permissions. Below the header bar, the menu bar gives you access to Home, which returns you to the Home page from anywhere in the application, as well as the View, Create, Analytics menus, and the PMO Dashboard. Note that the menu bars display this way for the default Top Navigation view. Changing your view to the Vertical Navigation option positions the menu bar on the left-hand side of the screen. See Navigation [page 14] for more details.

1.2.1 My Workers Dashboard

The My Workers widget and dashboard show a summary of your workers.

When logging in to the SAP Fieldglass application with the default user interface option, the My Workers widget displays on the Home page. Job postings and workers are divided into health states on the widget and dashboard (Critical, Warning, and Good). Selecting a job posting from the widget (or a health state) takes you to the My Workers dashboard. The dashboard contains all your job postings and workers on the left-hand side of the screen in a list. Selecting an item from the list displays a preview. You can use the **Search By** field to perform a search, filter by criticality, or use the **Show Starred Items Only** field to only display items that have been starred. Additionally, directly from the widget, you can select **+ Request Worker** to begin a job posting.

When you enable the Worker Centric user interface option (via the Feature Switch in the header bar), the My Workers widget displays with the**Go to Dashboard** button, which leads you to the Worker Dashboard. The Worker Centric **Worker Dashboard** provides a summary of all of your assigned workers. It also includes two Advisor charts allowing you to quickly see key performance indicators about worker spend.

The information is separated into two sections. The top section includes three cards: Items to Complete, Total Worker Spend for the Month, and Actual Spend by Month and Worker Count. The My Workers section at the bottom lists all assigned workers individually by state (Critical, Warning, and Good) in either card or list view. A red border indicates a Critical state and that items currently require attention. An orange border indicates a Warning state and that pending items may require attention in the near future. A green border indicates that the worker is in a Good state but may have pending items that require attention.

The Items to Complete card displays the items to be completed across all your assigned workers and separates them by thresholds defined by your administrator. In order to help facilitate this process, contextual help is available for this card. Selecting the **View Items to Complete** button opens additional details about the items and allows you to act on items without navigating away from the page.

The Total Worker Spend for the Month report compares the actual spend to date with the committed spend for the current month of all associated workers. The Actual Spend by Month and Worker Count chart shows the actual spend by month and the worker count.

Selecting a worker in the My Workers section displays the Worker Details page.

1.2.2 My Statements of Work Dashboard

The My Statements of Work widget and dashboard show your statements of work.

When logging in to the SAP Fieldglass application, the default user interface is enabled. With this default option enabled, the My Statements of Work widget displays on the Home page. Statements of work are divided into health states (Critical, Warning, and Good) on the widget. Selecting a statement of work from the widget (or a health state) takes you to the My Statements of Work dashboard. The dashboard contains all your statements of work on the left-hand side of the screen in a list. Selecting a statement of work from the list displays a preview. You can use the **Search By** field to perform a search, filter job postings by criticality, or use the **Show Starred Items Only** field to only display job postings that have been starred. Additionally, directly from the widget, you can select **+ Create SOW** to directly create a statement of work.

When you enable the Worker Centric option (via the Feature Switch in the header bar) the My Statements of Work widget displays with the**Go to Dashboard** button, which leads you to the **My Statements of Work** Dashboard.

1.2.3 My Job Postings Dashboard

The My Job Postings widget and dashboard show a summary of your job postings.

When the Worker Centric user interface option is enabled (via the Feature Switch in the header bar), the **My Job Postings** widget displays. Job postings are divided into health states (Critical, Warning, and Good) on the widget. You can select the **Request Worker** button from the widget to directly start a Job Posting or select the **Go to Dashboard** button to go to the **My Job Postings** dashboard.

The **My Job Postings** dashboard contains all your job postings on the left-hand side of the screen in a list. Selecting a job posting from the list displays a preview of the job posting. You can use the **Search By** field to perform a search, filter job postings by criticality, or use the **Show Starred Items Only** field to only display job postings that have been starred.

1.2.4 Customizing Your Home Page

Customization Mode helps you arrange widgets on your Home page.

Select the **Customization Mode** wrench icon to begin arranging the Home page according to your preferences.

Arranging Widgets:

- You can turn widgets **On** or **Off**, move widgets on the page, or view additional information about a widget's functions.
- To move a widget, hold down the **Move Widget** icon and drag it to the desired location. You can acquire more widgets by turning them on or off in Customization Mode or on the My Preferences page.

Contextual Help

- Contextual help gives you further details about a widget's function. To access Contextual Help, select the **Contextual Help** icon.

To exit Customization Mode, select **Done**.

1.3 Settings

Your Settings allow you to personalize your profile, set Home page and application preferences, and view an organizational chart made up of users and workers in the SAP Fieldglass application.

Select the avatar or photo in the top right of the page to access the three menu options options under **Settings**:

- My Profile
- My Preferences
- My Org Chart

1.3.1 My Profile

Customize your profile using the My Profile settings.

Select the photo or avatar in the top-right corner of your Home page and select **My Profile** under **Settings**. In the **My Profile** tab, any of the places that display the **Edit** option allow you to edit the information in that section.

- **Name**: Add or edit your general contact information in the section that contains your name.
- **Account Information**: You can change your password under Account Information. Further editing of Account Information can only be done by an administrator or someone in a user role with the administrative permission, User/Manage.
- **Organizational Structure**: Define or edit information for Default Legal Entity, Primary Business Unit, Default Site, and Default Cost Center.
- **Linked Accounts**: Link other buyers and suppliers to your account or disable this functionality.
- **Proxies**: Add or manage your proxies.
- **Delegates**: Add or manage your delegates.
- **Approvers & Supervisors**: View your supervisors and signature authority.

Proxy

A proxy is a user who can take action on another user's work items, but does not inherit the other user's visibility and permissions.

Proxies help ensure the workflow of documents, such as approval of time sheets, continues uninterrupted if a user is unable to take action during a period of time. For example, if a user is out on leave, a proxy can be established and the user’s work items are routed to the proxy for the time period selected. You can select a proxy using the My Profile page. Additionally, if you have the Administrative Permission:**Manage Users** enabled, you can also assign a proxy for a user. Proxies can be edited or removed at any time.

Proxies can be assigned for a specified date range. If a date range is not entered, the proxy is active immediately and remains a proxy until removed.

To ensure that proxies have appropriate permissions to act on work items, users available to be selected as proxies are limited to the following:

- Administrators
- Users within the same user role
- Users within an associated proxy role

When viewing work items, a proxy icon displays for items that have been routed to you via the proxy feature. You can also filter your list view to include proxy work items or not.

Assign a Proxy

When establishing a proxy, you can designate whether the proxy can approve all work items or just time sheets. A user can have multiple proxies and users can be proxies for one another.

1. Select your photo or avatar in the top-right corner.
2. Select **My Profile**.
3. Under **Proxies & Delegates**, select **Edit**.
4. Under **The following Users are your Proxy**, select **+ Add Proxy**.
5. Choose whether your proxy can approve **All Work Items** or just **Time Sheets**.
6. Select your proxy from the dropdown menu.
7. Select your **Start Date** and **End Date**.
8. Select **Add**.

You can view all your proxies in **The following Users are your Proxy** list under Proxies & Delegates.

Edit or Remove a Proxy

You can remove and edit yourself and other users from being proxies in the **My Profile** section under **Proxies & Delegates**. If the user you're a proxy for is closed, the proxy association is removed and they're no longer displayed in the Proxies section of the My Profile page.

- Under **The following Users are you Proxy**, select **Edit** to edit the proxy information, or **Remove** to remove the proxy.
- To remove yourself as a proxy, under **You are the Proxy for the following Users** select **Remove**.

Assign a Proxy to a User

Administrators and users in a role with the Administrative Permission: Manage Users enabled can assign a proxy for a user.

1. Select your name in the upper right-hand corner of the page and select **Admin Configuration** > **User** > **User.**
2. Choose the **Name** link for the desired user.
3. Select **Proxies** in the left-hand menu.
4. Select **Add Proxy**.
5. Select the desired **Work Items** on which a proxy can act.
6. Enter a **Start Date** and **End Date** if desired. If these dates are left blank, the selected user becomes a proxy immediately and stays a proxy until removed.
7. Select **Add**.

Delegate

Delegates have the same visibility and permissions as the original user and can take action on another user's work items, such as job postings, time sheets, and work orders.

Delegates are assigned and managed on a user's profile. You can assign your own delegates, or users with permission to assign delegates can assign them for you. A single user can have multiple delegates and can be assigned as a delegate for multiple users. Users who have not registered yet are not available to be selected as delegates.

To set up the Delegate functionality, enable the **Enable Delegate** company configuration. When this feature is enabled, all users can add delegates. All users can be selected as delegates regardless of associations, permissions, or user roles.

The list of a user's delegates as well as a list of accounts who a user is the delegate for appears in the Proxies & Delegates section of the My Profile page. You can access the My Profile page by selecting your photo or avatar in the upper right-hand section of their SAP Fieldglass Home page, then **My Profile**. The list can be edited and delegates can be added and removed as needed. You may remove yourself as a delegate for someone else, but you can't add yourself as a delegate for another user.

Add or Remove Delegates

- From the **My Profile** page, select **Edit** next to the **Proxies & Delegates** section.
- If desired, select the **Set Period** button to add start and end dates to newly added or existing delegates. After the end date is reached, the delegate is removed from the list.
- To add a delegate, select **+ Add Delegate**. To remove a delegate, select **Remove** next to the user's name.

Linked Accounts

The Linked Accounts list, accessible from your profile picture, displays a list of accounts you can immediately switch to. Once a delegate has been assigned, the profile automatically displays in the Linked Accounts list.

Other accounts can be linked as well by navigating to **Settings** > **My Profile** > **Linked Accounts.**

Act as a Delegate

To act as a delegate, select the account from the Linked Accounts list (the delegate icon displays next to the account name). This action automatically switches a user from their account, to the account for which they are the delegate. To switch back, use the linked account list again.

When a delegate is logged into the original user's account, the My Profile and My Preferences pages are locked for editing for security reasons. Actions completed by a delegate appear in the System Audit Trail and in the Audit Trail section of a document's Lifecycle Tab with the original user's name followed by the delegate user's name in parentheses.

When accessing a user's account as a delegate, an error occurs if:

- The original user's password has expired. For these cases, password resets can only be completed by original users.
- The original user's account has been deactivated.

1.3.2 My Preferences

The My Preferences tab contains Home page and applications settings, messaging options, and other default choices.

Select the photo or avatar in the top-right corner of your Home page and select **My Preferences** under **Settings**. In the **My Preferences** tab, any area that displays the **Edit** option allows you to edit information in that section.

The information in the following sections can be edited:

Locale

Add or edit general information for items such as currency, time zone, language, date, calendar start day, time format, and number format.

Home Page and Application Settings

- **Color Theme:** Choose from several options for the application's color theme: 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.
  Buyer companies can request their own company-branded color theme from their SAP Fieldglass representative. Once created, it can be applied to new buyer users, and existing buyer users can set their personal color theme to the new company-branded theme at the user preference level.
- **Landing Page upon Log In**: Choose which page displays upon login.
- **Home Page Items**: Choose which pages you would like to see or hide on the Home page.
- **Home Page Counts**: Show or hide Statement of Work Counts and Show Worker Counts.
- **Default Tab On Documents**: Select whether you would like the Details or Summary tab to display on documents. The Details tab gives specific information about the document and the Summary tab gives a basic summary version.
- **Reports and Charts**: Expand report and chart information, or add a new report.
- **Graphical View**: Choose this option to enable a low-density view for pages in the contingent workflow, such as the Job Posting preview modal and Job Posting Distribution tab.
- **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.

Messaging

Choose preferences for email format, email and system message notifications, and sending notification digests and work item digests.

Interview/Meeting

Edit the default information for interviews or meetings, addresses, phone or video conference information, meeting times and durations, and G Suite Email addresses.

1.3.3 My Org Chart

The My Org Chart link is a quick way to access the organizational chart, a graphical representation of employees and non-employees in one view.

The organizational chart shows you basic information about work-related individuals who are users or workers in the SAP Fieldglass application. It shows how they relate to each other in a hierarchical format.

Related Information

Organizational Chart [page 12]
Viewing the Organizational Chart [page 13]

Organizational Chart

Provides buyers and workers with an interactive graphical representation of both employees and non-employees who are users or workers in the SAP Fieldglass application in one view.

The organizational chart provides basic information including the SAP Fieldglass reporting hierarchy. For buyer users, the primary supervisor of the user is used; for workers, the worker owner is used. The chart shows two levels above the person, the peer group, and one level below.

The **Enable Organizational Chart** company configuration must be enabled before you can view organizational charts. When the configuration is enabled, users in roles with the administrative permission **Organization Chart** > **View** have access to the **My Org Chart** link from the **Settings** menu.

Find Similar People, a feature that allows buyers to find workers with similar skills, can also be accessed from the organizational chart.

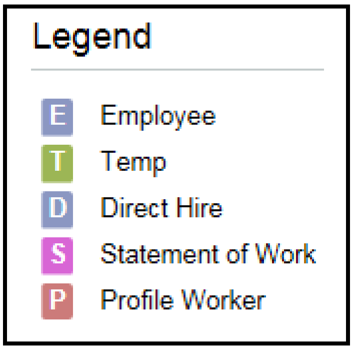
Related Information

Viewing the Organizational Chart [page 13]
Find Similar People [page 17]

Viewing the Organizational Chart

The organizational chart uses the logged in user as the starting point and displays two levels above the user, the user's peers, and the user's direct reports.

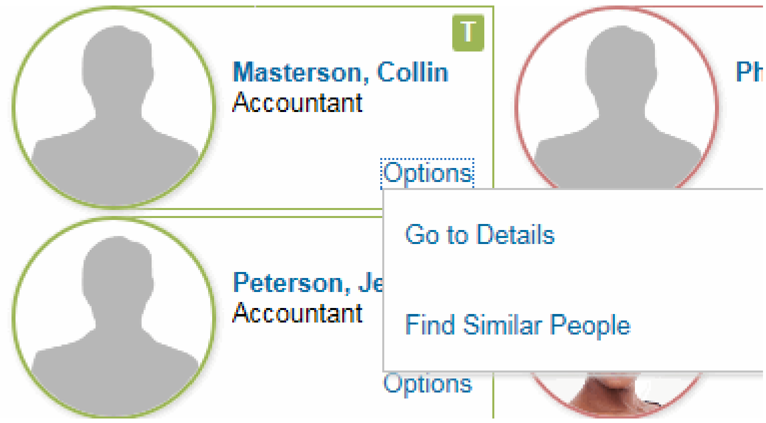
Organizational Chart Legend



See the organizational chart legend to determine the types of individuals shown in the organizational chart.

Organizational Chart Options

Each person in the organizational chart has an Options link. Selecting **Options** gives you access to the **Go to Details** and **Find Similar People** options. When you select **Go to Details**, if you have visibility, the Details page for the user or worker is displayed. When you select the **Find Similar People** option, you are able to explore workers and buyer users who have similar skills. This option only displays if the buyer uses job code functionality and the buyer user or worker has been assigned a job code.



2 Working with SAP Fieldglass

Learn how to streamline your experience by searching, navigating, and operating different parts of the application.

This section contains information about features that help you to organize daily activities, maneuver through the application, and search for individuals or pinpoint important documents. These areas include (but are not limited to):

- **Navigational Bars**: Two menu bars give you quick access to other parts of the application.
- **PMO Dashboard**: Easily manage day-to-day items.
- **Search**: Use various search features like the People Search or Global Search to locate people or documents.
- **Social Messages**: Communicate or record information about the workflow of items.
- **Organizational Chart**: Delve into an interactive graphical chart of users or workers in the SAP Fieldglass application.

2.1 Feature Switch

The Feature Switch provides user interface options.

The Feature Switch is located on the header bar. Selecting the **View Feature Switch** icon displays a menu of select user interface features that you can toggle on and off. These features can include, for example, new interface options or layouts. In future releases, these may become standard parts of the interface.

2.2 Navigation

There are two options for navigating the SAP Fieldglass application.

The SAP Fieldglass application's user interface can be viewed using the Top Navigation option or the Vertical Navigation option. The Top Navigation option is enabled by default. In order to enable the Vertical Navigation option, navigate to the Feature Switch in the header bar and select **Vertical Navigation**. To return to the Top Navigation option, simply deselect the Vertical Navigation option.

Top Navigation

The Top Navigation option displays two navigational bars located at the top of the Home page, the header bar and the menu bar. Even when navigating to other pages, these bars are permanently positioned at the top.

The header bar contains the Search bar, Web Assistant, Feature Switch, Work Items menu, Message Center, Admin Configuration, and Help icon (some of these items may not display if you don't have the proper permissions). Settings are found by selecting your photo or avatar. The Feature Switch displays a menu of select user interface features that you can toggle on and off. These features can include, for example, new interface options or layouts. In future releases, these may become standard parts of the interface.

The menu bar, located directly underneath the header bar, contains:

- **Home**: Returns you to the Home page.
- **View**: Leads you to view the pages nested within My Items, Planning, Contingent Labor, Services, Worker, Payments, and Supplier.
- **Create**: Allows you to create various items such as a Job Posting or Statement of Work.
- **Analytics**: Gives you access to report information.
- **PMO Dashboard**: Allows you to manage day-to-day tactical items within SAP Fieldglass that may require action.

Vertical Navigation

The **Vertical Navigation** option provides an alternate way to navigate the SAP Fieldglass application, using a convenient side panel to house menu items. All categories and modules are displayed in a panel on the left-hand side of the application's Home page.

The selectable categories are displayed on the side panel with corresponding icons. When a category on the panel is selected, it expands to show its respective modules in a list. When you select a module from that list, you're directed to that module's default page.

The **Create** button opens the Create menu, which enables quick creation of items such as job postings, statements of work, reports, and more.

The Admin menu is accessible through the **Admin** button located on the bottom of the side panel.

The Help menu is available through the **Help** button on the bottom of the side panel and expands to show support options.

2.3 Search Tools

The SAP Fieldglass application provides multiple ways to perform customized searches.

Use the following search features to locate documents, users, records, and more:

- Global Search
- Advanced Search
- People Search

2.3.1 Global Search

Quickly search from the Home page using the Global Search bar.

The Global Search functionality is always available from the header bar in the application. You can search by any text or ID; however it does not render results based on geographical location as it does in Advanced Search.

To use Global Search, in the header bar on the Home page, place cursor inside the search bar. Enter a document ID number or any text you would like to search. The search results display either the document you searched for or a list of results.

2.3.2 Search People

The People view allows you to search for people in one list, view their contact details, and access the organizational chart.

Throughout the SAP Fieldglass workflow, individuals acquire roles representing their status in the work life cycle. For example, workers begin their life cycle as job seekers, move to work orders, and finally become workers. The People View is a consolidated list of buyer users, contingent workers, SOW workers, and profile workers. Search results display individuals in one list, regardless of their status in the workflow, and present the most current role.

Setup

To use the People view, the **Use People View** company configuration must be enabled and the **Search People** widget shown. If Use People View is enabled, companies who want to exclude buyers in the People view can select the **Exclude Users from People View** sub-configuration. When this is enabled, only workers are included in the People view.

Usage

The Search People widget uses a “begins with” search that returns people that begin with the search word entered. For example, typing Jose would find people with the name Jose Rodriguez or people who work at the buyer’s Joseph City site. It would not return results that contain people with names formatted like Rodriguez, Jose.

The People view returns people that match the search criteria and includes associated documents that match the person's name. It does not show workers, SOW workers, or profile workers that have been Closed. If however, a Closed individual was open within the selected time period, they are in that case shown. Closed work orders and SOW work orders don't appear.

In the case of Buyers, only active users are shown (including users flagged as MSP users). Buyers can be excluded from the People view when the **Exclude Users from People View** company sub-configuration is enabled.

Viewing Search Results

For each worker, the People view displays the latest record associated to the worker. For example, for Temp workers, SAP Fieldglass displays the Job Seeker Detail for the worker if a work order hasn't been created. If a work order has been created, the work order displays. Similarly, if searching for a job seeker by ID, if a worker record exists, the worker record is returned in the search results. Select **Go to Details** to view more information on the person.

Selecting a person's photo in the People view displays their contact card. The contact card displays contact information for the person, such as email address, phone number, time zone, and the View Organizational Chart icon.

> i Note
>
> In order for the View Organizational Chart icon to appear on the person's contact card, the person must be a worker.

Search People Widget

You can search for individuals in the Search People widget or the People view by name or keyword:

1. Choose the **Search** icon in the Search People widget to be directed to the People view. Alternatively, perform a search directly in the widget using a name or keyword.
2. Enter your search criteria in the People view, under **Keyword**.
3. Enter the desired information in the filter fields and choose **Apply Filters** to further customize your search.
4. Locate the individual you searched for in the search results.
5. Select **Go to Details** to view a complete list of details about the person. You can also select the person's photo to see their contact card for general information.

2.3.3 Find Similar People

The Find Similar People feature allows buyers to look at all workers to see which workers have similar skills. This option is only available if the buyer company is using job codes.

Buyers can view similar people including employees, temps, profile workers, direct hires, and SOW workers. This allows them to find others with similar skills.

Find Similar People Modal

The Find Similar People modal displays users and workers with the same job code as the selected person.

When viewing the list, note that only active users and direct hires display in the list, while closed users don't. Temp and SOW workers display when they are active during the date range selected.

From the **Find Similar People** modal, you can select the name to open the organizational chart for the individual, or select the **Details** link to open the individual's user profile or worker summary.

Find Similar People Usage

You can access the Find Similar People modal from a variety of areas in the application. If a buyer company is not using job codes, the Find Similar People option is not displayed. The Find Similar People feature is available in the following areas:

- Organizational Chart: Select the **Options** link on a person in the organizational chart and choose the **Find Similar People** link.
- Users List: From the **Users** list view, select **Find Similar People** next to the user's name in the list.
- Job Posting Template: From the **Job Posting Templates** list view, select **Find Similar People** next to the user's name in the list.
- Job Posting: From a job posting, select the **Find Similar People** option from the **Actions** menu.
- Worker: From the worker record, select the **Find Similar People** option from the **Actions** menu.

2.4 Working with List Views

List Views display items or search results as a list of entries.

Different filtering options display to help you customize the items in the list. You can filter using several options including time period, group, status, location, and view, among others. You can also enter specific information to search by name, ID, supplier, and more depending on the specific list.

The **View More Items** menu, located in the top right-hand side of the list view contains the following options:

- **Pin to Home Page**: Selecting this option pin the list view to your home page.
- **Configure List Columns**: Selecting this option allows you to check the fields you want to display in your list view. Once you've checked your preferred fields, select **Update**. The unchecked fields are removed from your list view.
- **View Past Data**: Selecting this option and configuring dates allows you to see data for that list view from the past.
- **View Archive Data**: Selecting this option allows you to see archived data for that list view.

2.4.1 Past & Archive Data

You can access data from past time intervals using the Past Data functionality.

The Past Data functionality automatically moves documents that have aged out of general list views and into Past Data list views in order to declutter general list views and maintain organization. Note that you lose visibility into aged documents unless you view them in the corresponding Past Data list view.

To access Past Data, navigate to the Admin menu by selecting the **View Administration Menu** icon in the header bar and choose **Past & Archive Data** under the **Past Data** section. Select a module from the dropdown menu. On the Past Data page for the selected module, enter the desired time period in the past, along with any other information you would like to filter by, and select **Apply Filters**. Alternatively, you can access Past Data directly from a list view by selecting the **View More Items** menu and choosing **View Past Data**.

If you select the **Worker** module for Past Data and your company has uploaded data with the Historical Worker Upload or Historical Time Expense Upload, the **Historical Worker** list view tab displays on the **Past: Workers** list view.

Unless an exception occurs, documents move into Past Data list views at the following times:

- Closed items and paid invoices move into Past Data after 7 days.
- Approved invoices move into Past Data after 45 days.
- Approved expense sheets and time sheets move into Past Data after 90 days.

2.4.2 View Workflow

You can access a workflow diagram using the View Workflow functionality.

The View Workflow functionality helps users understand the progress of items based on the status of each work order or work order revision. You can hover over each step within the workflow to display the next step action within the workflow. While all steps are displayed in the workflow, some steps may not be applicable based on your company setup.

To access a workflow diagram from a list view, select the **View More Items** menu and choose **View Workflow**.

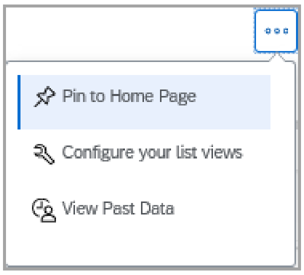
> **i Note**
>
> This option is currently only available on the Work Order list view page.

3 Pinning Links

Pinning links allows buyers and suppliers to create links on Create and List View pages for all admin objects and most documents, providing one-click access from the Pinned Links widget on the Home page.

Pin a Link

1. To pin a link, navigate to a page, and select the **View More Items** menu. From the menu, choose **Pin to Home Page**. The page is then added in the Pinned Links widget on the Home page.



2. To unpin a link, select the “x” on the Pinned Links widget on the Home page. Alternatively, navigate to the pinned page, and select **Unpin from Home Page** from the **View More Items** menu.

4 Social Messages

The SAP Fieldglass Social Messages features provide multiple ways for users to record information and communicate regarding the workflow and management of documents.

When enabled, the Social Messages features are available for use on documents such as job postings, statements of work, and work orders in the contingent and services modules.

The following features are included in the Social Messages package:

- **Chat**: This feature allows you to create chat logs related to documents and Candidate Portal Applicants.
- **Reminders**: This feature allows you to create reminders flagged with dates. The company configuration setting for Reminders is **Enable Reminder**.
- **Annotations**: This feature allows you to capture private or public notes related to documents. The company configuration settings for Annotations are **Enable Annotations (Contingent)** and **Enable Annotations (Services)**.

Optional Messaging Available

Default messages are available to be enabled or customized in the **Messaging** section of the **Admin** menu.

- Ask an Expert: Chat Buyer (Contingent) and Chat Buyer (Services) modules
- Chat: Chat Buyer, Chat Buyer FCP Person (Contingent), and Chat Supplier modules
- Reminder: Reminder module

Usage

Individuals with appropriate user role permissions can access features by selecting the **Social Messages** icon at the top of documents. Each feature that is configured displays as a tab in Social Messages when available for use. Each tab displays the total number of items for that feature next to the tab title. In addition to Social Messages, the message center, list views, work items, and Home page widgets also provide options for managing social messages communications.

The features allow you to access modal windows where you can create, view, edit, and remove communications as needed. If annotations, reminders, or chats exist for a document, a blue dot appears on the tab. Tabs not appearing in Social Messages indicate that they are either not enabled or not available for the item or document.

4.1 Annotations

Annotations are used to capture private notes, create public notations, or review public notations on a variety of documents to which users have access to in SAP Fieldglass.

Access annotations directly from the documents or View menu. Note that buyer-created annotations are not visible to suppliers and supplier-created annotations are not visible to buyers.

- **Create Annotations**: To create an annotation on a document, select the **Social Messages** icon and choose the **Annotations** tab. Depending on your visibility, options for **Only Me**, **Program Office**, and **My Company** display and allow you to choose the annotation audience. Enter the annotation information, and choose **Save**.
- **Manage Annotations**: With the correct permissions, you can view, submit, manage, edit, or remove annotations from yourself and others. Annotations can be managed from through Social Messages on documents or from the **Annotation List** page.

The following table displays the user role settings that can be enabled to use Annotations:

User Role Settings	Options
Annotation (Contingent) Annotation (Services)	Options are **View**, **Submit**, and **Manage Other's Annotations**. To edit or remove annotations posted by others, the Manage Other's Annotations option must be enabled.

4.2 Chat

The Chat feature is used to initiate communication with buyers or suppliers and allows anyone with document visibility and chat permission to see associated chats.

Chats are visible immediately and can be accessed directly from various documents. Buyers can initiate chats with suppliers as well as Candidate Portal applicants, while suppliers can initiate chats with buyers and suppliers.

Initiate a Chat

- To initiate a chat on a document, select the **Social Messages** icon and choose the **Chat** tab. Select **My Company** to share the chat with users in your company with the appropriate permissions.

  > i Note
  >
  > Chat messages in all modules are limited to 4000 characters.

- Saved chats appear in the message center and on related documents.

Initiate Chats with Suppliers

- To initiate a chat with all suppliers on a document, select the **Social Messages** icon and choose the **Chat** tab. Select **All Suppliers** to initiate a chat with all suppliers associated with the document. Select **Supplier** to select a single supplier from a list of suppliers associated with the document.
- Chats can be initiated with suppliers on records that have associated suppliers and aren't in Draft status. For example, a job posting that has been distributed would allow for chat messages to be sent to suppliers. When a chat is initiated, the **All Suppliers** and **Supplier** tabs display in the Chat modal window.

> **i Note**
>
> If Chats between suppliers for SOW Bids have been disabled, the **All Suppliers** tab isn't visible.

Manage Chats

You can view, edit, and remove chat messages. Chat messages can be viewed through Social Messages or the message center. You can also respond to a chat message received via email.

To ensure full transparency and fair competition for all suppliers, buyers can optionally enter a chat cut-off date and time on an SOW bid. Once enabled, suppliers can ask a buyer questions about the SOW bid using the Chat function before the cut-off date and time. If used, the cut-off date and time display at the top of the Chat page for the SOW bid. Once the chat cut-off date has passed, suppliers can no longer edit or remove existing chats or save new chats; however, they can still use the Chat feature to view all chat messages.

Considerations

Chat messages are grouped and visible only to individuals who can view a related job posting or work order. Posted chats for job postings and job seekers are grouped and displayed on job posting and job seeker documents; posted chats for work orders, work order revisions, and workers are grouped and displayed on the work order, work order revision, and worker documents. When entering a message for a specific item, it's best practice to reference the document ID, name, or other identifying information.

Suppliers who have received a job posting can be included in chats. When a job posting is distributed to subsequent levels in the distribution group, the new suppliers are able to view all previous chats that occurred before the job posting was distributed to them.

The following table displays the user role settings that can be enabled to use Chat:

User Role Settings	Options
Chat Buyer (Contingent) Chat Buyer Supplier (Contingent) Chat Buyer Candidate Portal Person (Contingent) Chat Buyer (Services) Chat Buyer Supplier (Services)	Options are **View**, **Submit**, and **Manage Other's messages**. To edit or remove chats posted by others, the **Manage Other's messages** option must be enabled.

4.3 Reminders

The Reminders feature enables buyers to create reminders related to documents for themselves or for other users. Reminders create work items and they can be immediate or date driven.

Reminders are created and viewed from the Reminder List page or from various documents:

With the appropriate permissions, you can create a reminder using the following steps:

1. Select the **Social Messages** icon.
2. Choose the **Reminders** tab.
3. Select **Create Reminder**.
4. In the **Description** field, enter the information for the reminder.
5. In the **Remind On** field, select the date SAP Fieldglass should send the reminder.
6. Select yourself or another user as the **Recipient**.
7. Choose **Submit**.

> **Note**
>
> The document ID populates automatically in the **Attach to Document ID** field. If desired, it can be removed or updated with a different document ID. If a different document ID is entered, the reminder is visible on that document.

Manage Reminders from the Work Items List

You can edit, remove, or mark reminders as complete. Additionally, you can manage reminders other users created from Social Messages, reminder page, or the work items list.

Reminders display in your work items list and can be viewed and marked complete using the **Mark as Complete** link.

When a reminder is created for you by another user, a message is generated. The message can be viewed and the reminder can be marked complete in the message center. Dated reminders appear in the message center on the due date and they cannot be removed until they are marked complete.

Manage Reminders from the Reminder List

You can create, view, edit, and remove reminders from the **Reminders** page. Reminders that you create for yourself can be viewed, edited, and removed from the list. Reminders that were created for you by others can also be viewed.

To access the **Reminders** list, select **View** > **Reminders.**

If the logged in user is the reminder recipient, a **Complete** link displays in the **Action** column. Select **Complete** to mark the reminder complete.

Incomplete reminders and reminders that have been marked complete display in the list until the reminder is removed. The list can be filtered and sorted. You can remove any reminders that you have created, whether for yourself or for another user.

Reminders can be edited or removed using the **Edit** link. Removing a reminder removes it from the Reminder list and from the related document. Reminders cannot be marked complete from the Reminder list.

New reminders can be created using the **Create Reminder** button on the Reminders list.

The following table displays the user role settings that can be enabled to use Reminders:

User Role Settings	Options
Reminder	Options are **View**, **Submit**, and **Create for Other Users**. To create reminders for others, the **Create for Other Users** option must be enabled.

4.4 Social Messages Management Tools

The Social Messages features can be managed in multiple ways depending on user role permissions and document associations.

The following tools are available to manage the social messages features:

Social Messages Button

When viewing a document, use the social messages button to view and manage annotations, chats, and reminders related to the document.

Message Center

Messages related to social messages features are used to notify users about communications that need their attention. These communications can be viewed and managed in the message center. Note that removing messages from the message center does not remove the communication from the related documents.

List Views

Social Messages features Reminders, Annotations, and Chat items and display in the **My Items** section of the **View** menu. Select an item from the menu to access the list view page. Actions that can be performed in list views vary for each feature.

Home Page Widgets

When the **Starred Items** widget is selected to display on the Home page, a list of starred items displays with links to starred documents. Select the link to access the document from the Home page.

When the **Open Job Postings** widget is selected to display on the Home page, messages and chats related to job postings in the list can be viewed and managed.

5 Starring

Starring allows users to create bookmarks for items and documents, making them easy to access from the Starred Items list.

You can star documents for yourself or for other users. Starring is available to buyers and suppliers, however, buyers can only star items for other buyer users and suppliers can only star items for other supplier users. All users can star items for themselves, however only users with the user role permission **Starring: Star for Other Users** can star items for another user.

Star an Item

1. To star an item, navigate to the item and select the **Starred** icon.
2. Select **Star for Me** to star an item for yourself. When an item is starred, the Starred icon appears shaded.
3. To star an item for another user, select **Star for Someone Else**. Note that when an item is starred for a user by someone else, a message is generated and can be viewed in the message center or received via email.
4. Select a Recipient. If the recipient you selected doesn't have access to the item, a warning message is displayed and the item isn't starred.

Manage Starred Items

You can view starred items using the **Starred Items** list under **View** > **Starred.**

Stars can be viewed and removed using the **Starred** icon. To remove a star, select the **Starred** icon and select **Unstar for Me**. The star is automatically removed and no longer appears gold. Alternately, navigate to the Starred Items list view and select the **Starred** icon to remove it as a starred item. You can also select **Star for Someone Else** to star the item for another recipient.

You can filter by items starred as favorites on the My Workers and My Statements of Work dashboards using the Show Starred Items Only toggle.

These are the user role settings that can be enabled to use Starring:

User Role Settings	Options
None	There are no user role settings required for users to star items for themselves. However, to star items for other users, the **Star for Other Users** option must be enabled.

6 Ask an Expert

The Ask an Expert feature enables buyers to ask other buyers questions related to job postings and statements of work and is available when creating documents.

Users who are flagged as experts receive the questions as a message in their message center or via email. From there, they can respond or forward the question to another user. Note that Ask an Expert is not available when you create a statement of work from an SOW Bid.

Submit a Question

The Ask an Expert feature appears at the top of the **Create Job Posting** page and the **Create Statement of Work** page.

- Click the **Ask Question** button to submit a question.
- Once a question is submitted, the **Ask Another Question** button appears on the page. Responses are received and communication can be continued using the message center.

> **i Note**
>
> Note: The Ask an Expert feature is only available on the first step of the job posting creation process and the statement of work creation process.

Customize Ask an Expert Text

The default text that appears with the Ask an Expert feature can be customized. Contact your SAP Fieldglass representative for help.

Respond to a Question

Questions are automatically routed to users with the enabled settings. These recipients can respond or forward questions using the message center. Additionally, recipients whose messaging preferences indicate they receive Question type messages in email format can respond to questions by replying to the email. While certain conditions must be met for a user to receive the initial questions, when a question is forwarded, there are no restrictions. Recipients can forward Ask an Expert message they receive to any buyer in the company from the message center.

Review Responses

Responses to questions appear with the subject displayed as Reply to Question posted. When a user responds to a question, all other users who received the original question also receive the response. You can respond to a question from the message center or by replying to the email.

The following table displays the user role settings that can be enabled to use Ask an Expert:

User Role Settings	Details
Ask an Expert - Chat Buyer (Contingent): **Submit** Ask an Expert - Chat Buyer (Services): **Submit**	If the **Submit** setting is not enabled, you cannot use this feature.

User Role Settings	Details
User will receive Ask an Expert questions	This setting must be enabled by an administrator in order for users to receive and respond to questions. Note that questions are only sent to experts that have visibility to the primary business unit of the user asking the question.

7 PMO Dashboard

The PMO Dashboard allows authorized users to manage day-to-day tactical items within SAP Fieldglass that may require action. Follow up and completion of these work items ensures that the workflow continues with minimal interruptions. Use of this tool can immediately improve the efficiency of the program.

The data displayed when a user accesses the PMO Dashboard is based on the business unit, site, and cost center associations of the user. The dashboard includes two groups: Critical and Warning, and the items that appear in each are based on the PMO Dashboard Threshold settings. Thresholds are set to determine the amount of time that should pass before an item that requires action triggers a warning and then becomes critical if no action is taken.

A few steps are required to implement the PMO Dashboard. Additional setup options are also available to ensure the desired use of this feature.

Required Setup

Required Setup	Description
Enable the PMO Dashboard company configuration option.	The **PMO Dashboard** company configuration option must be enabled before users can be given access to the dashboard. When enabled, **Thresholds - PMO Dashboard** is an option in the **Workflow** section of the Admin menu.
Enable the PMO Dashboard user profile feature option.	When the **PMO Dashboard** company configuration option is enabled, **PMO Dashboard** displays as an option in the **Feature Access** section on a user's profile. Enable this option to allow the user access to the PMO Dashboard.
Establish PMO Dashboard Thresholds.	PMO Dashboard Thresholds are used to determine the items that display on the PMO Dashboard and to establish warning and critical levels for those items. Threshold settings are not enabled by default.

Optional Setup

Optional Setup	Description
Enable the PMO Dashboard user role permissions.	Enable the **PMO Dashboard** user role permissions for users who will need to establish PMO Dashboard thresholds. In order to establish the necessary thresholds that populate the PMO Dashboard with information, users must be an Administrator or in a user role with the Administrative Permissions **Thresholds- PMO Dashboard**: **View** and **Manage** enabled.
Enable PMO Dashboard messages.	Default PMO Dashboard messages are available and can be enabled or customized in the **Thresholds - PMO Dashboard** module in **Admin** > **Messaging.**

Related Information

Thresholds - PMO Dashboard [page 30]
Using the PMO Dashboard [page 30]

7.1 Thresholds - PMO Dashboard

In order for items to appear in the PMO Dashboard, thresholds must be enabled and values must be entered.

PMO Dashboard Thresholds are used to determine the items that display on the PMO Dashboard and to establish warning and critical levels for those items. PMO Dashboard Thresholds also determine when critical and warning icons display for items in SAP Fieldglass, such as activity items and offboarding activity items and worker items in the My Workers Dashboard.

Administrators and users with appropriate administrative permissions can establish PMO Dashboard Thresholds in the **Workflow** section of the **Admin** menu. Select **Edit** to enter new thresholds or update existing settings.

For the thresholds you wish to capture on the PMO Dashboard, enter numeric values for the **Critical** and **Warning** columns. Depending on the module, thresholds are set based on number of days or a percentage. For example, a threshold may be set to include workers nearing their end date on the PMO Dashboard. The Warning threshold may be set at 14 days and the Critical threshold may be set at 7 days. Workers with an end date between 14 and 8 days away from the current date will be listed in the warning list, and workers whose end date is within 7 days of the current date will be in the critical list.

> i Note
>
> If enabled, some thresholds display in the PMO Dashboard immediately as critical items, such as time sheets in Approval Paused status. The **Critical** threshold value for these items is set to **Instantly** and cannot be changed. Warning threshold settings do not apply.

Related Information

PMO Dashboard [page 29]

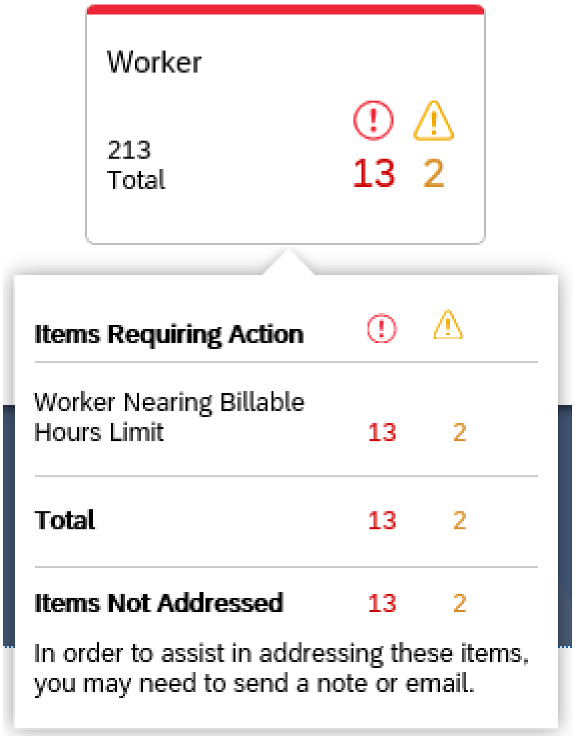
7.2 Using the PMO Dashboard

You can use the PMO Dashboard to view a summary of items approaching threshold deadlines and filter the information you'd like displayed.

You can access the PMO Dashboard by selecting it from the menu bar on the Home page in the application.

Information displays in tiles for each module and each tile displays the count of items that meet the defined threshold values that have not been acted upon in Warning (yellow) and Critical (red) status. The **Total** on each tile represents the sum of all items that are in statuses for which a PMO Dashboard threshold can be configured. (It does not reflect the number of items for that module that actually meet the thresholds.)

Select a tile to open a summary of items requiring action (number of items per threshold). Choose an individual threshold to open a list view of items requiring action.



Using Filters

You can filter the PMO Dashboard results by using the filters at the top of the page. Use the **Show More Filters** link at the top of the page to reveal the full list of filters. Selecting **Show Less Filters** hides filters to free up space on the page.

When you are finished making filter selections, select **Search** to display the search results.

Filter	Description
All, My Group, My Own	These filters display for all users, but only display results you are permitted to see. For example, selecting **All** only displays your items if you are restricted to visibility to your items only.
Labor Type	Use to limit results to items that are associated to particular labor type(s).
Cost Center, Site, Business Unit, Sup-plier	By default, all items are shown. Choose **Select** to limit results to items that are related to particular cost centers, sites, business units, and/or suppliers.

Filter	Description
Document Type	Choose to display items for **Contingent**, **Services**, or **All** document types. For example, choosing **Services** hides thresholds for job postings.
Only show items requiring action	Setting this filter to **Yes** hides tiles that have no thresholds for both critical and warning. All tiles display if this filter is set to **No**. Tiles with no thresholds display zero counts.

Document Type filters are **Contingent**, **Services**, and **All**.

Turning Tiles On and Off

You can customize which tiles display when you view the PMO Dashboard. As members of the Program Office may have different responsibilities, everyone may not need to see all available modules. This feature lets you suppress any modules that you do not want displayed on the dashboard.

To turn tiles on and off, select the **wrench** icon at the top of the PMO Dashboard.

8 Support Tools

Use the support tools in the application to learn about new features or upload attachments.

Support tools include:

- Release Communication Document
- Product Documentation on the SAP Help Portal
- Reference Library

8.1 Customer Support Help Center for SAP Fieldglass

A harmonized Help Center customer support experience is available to SAP Fieldglass users that includes an enhanced case submission experience, as well as access to a variety of support documentation to allow users to quickly resolve their inquiries.

This support feature provides users with easy access to customer self-service assistance when issues arise such as forgotten signin credentials, unresolved warnings or errors, unexpected system results, or general process support information. The Help Center includes a variety of options to help users locate information and tools for immediate assistance.

- Access knowledge base support content such as FAQs and product documentation.
- Interact with Guided Assistance to help you find answers and solutions to issues.

Access to the Help Center

The SAP Fieldglass Help Center is available to buyer users, all worker types, Candidate Portal account users, supplier users, and PMO users. Options to open the Help Center are available in the following areas:

- On the Sign In page, select the **Support** icon.
- From within the application, select the **Contact Us** option in the Help menu (?).
- Email messages and message templates containing default text include the **SAP Fieldglass Help Center** link.

Help Center Content by User Type

Access to content and options within the Help Center is based on user role (buyer, PMO user, supplier, worker) within the application. Personas are based on a user's SAP Fieldglass signin credentials. This allows us to customize the available content and options to improve the user experience.

When users access the Help Center from the SAP Fieldglass application, the following personas are used to provide the appropriate user experience:

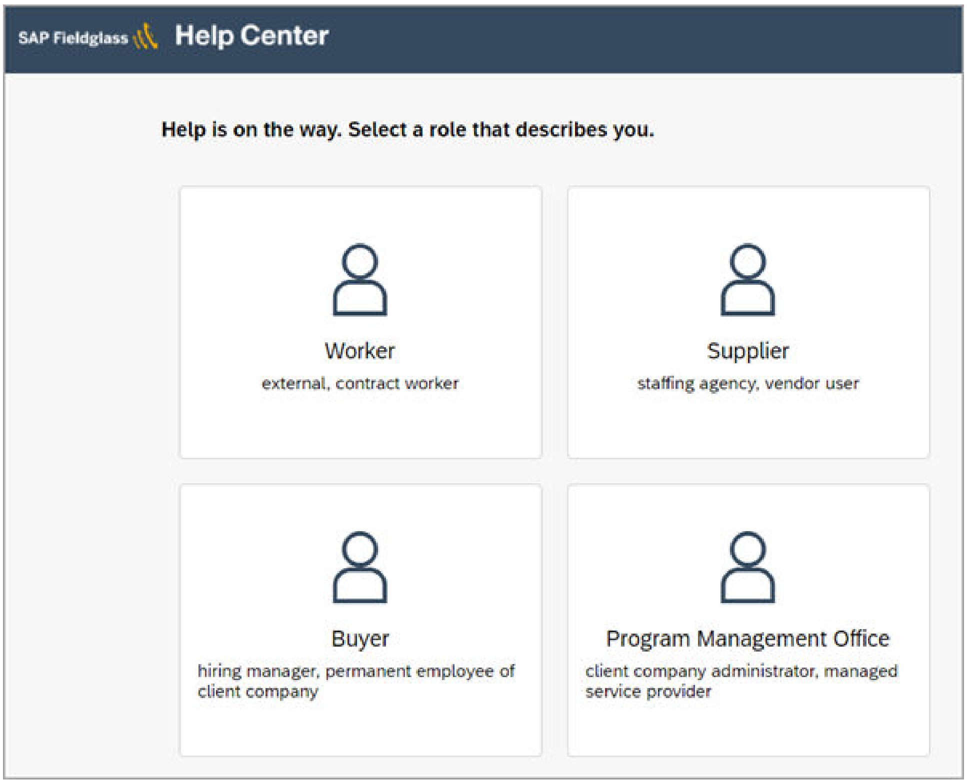
- FGbuyer - general buyer users and buyer administrators
- FGsupplier - supplier users and supplier administrators
- FGworker - workers and Candidate Portal users

- FGPMO - PMO users and buyer administrators

8.1.1 Using the SAP Fieldglass Help Center

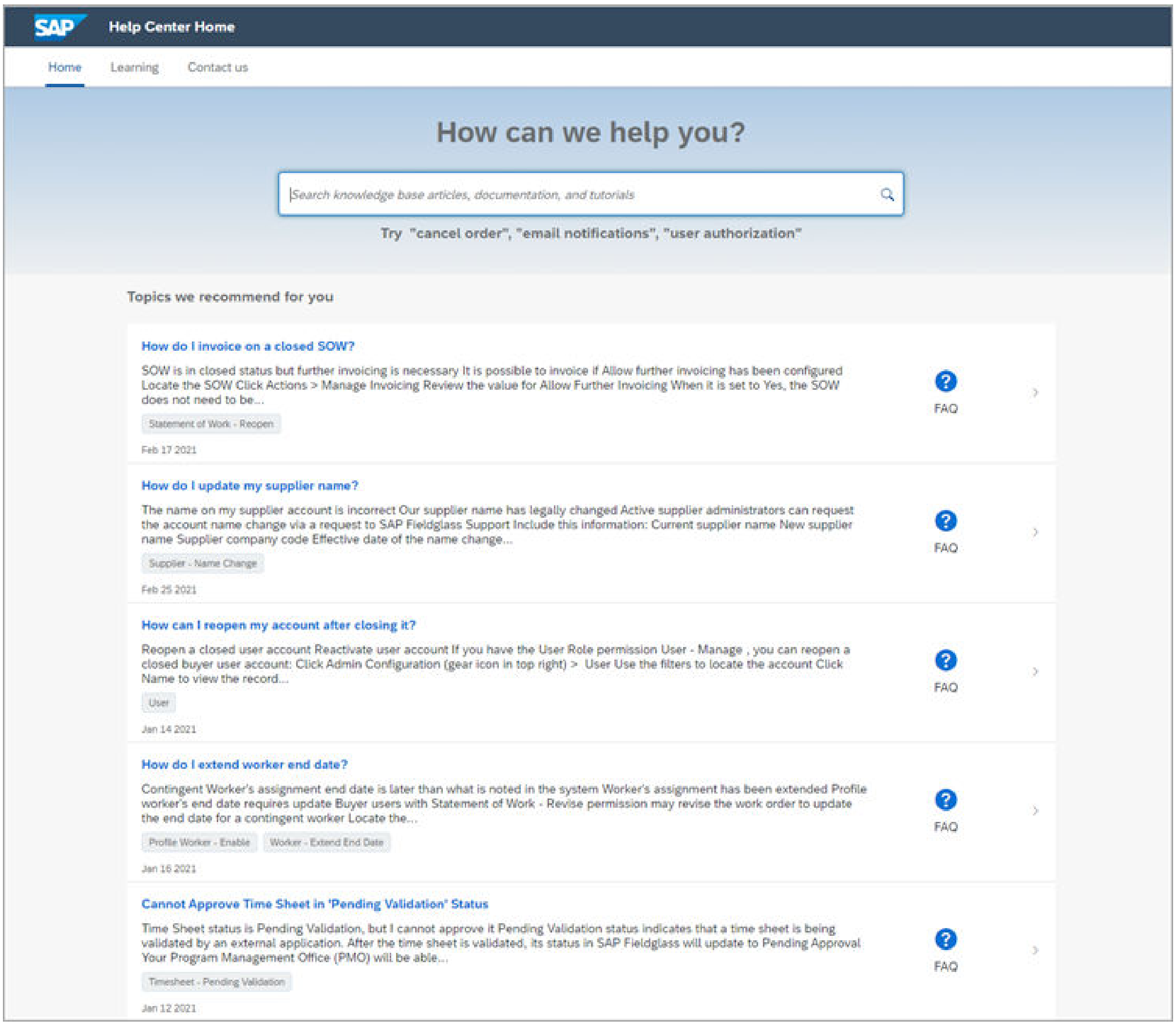
The SAP Fieldglass Help Center provides a personalized experience based on your role in the application (buyer, supplier, worker, PMO).

If you are signed in to the SAP Fieldglass application, you'll authenticate into the Help Center using the role to which you are assigned in the application. If you access the Help Center from the SAP Fieldglass sign in page, you'll first need to select your role.



Select Role

When the Help Center opens, the **Home** tab displays where you can search for information or browse through a list of recommended content from our knowledge base based on your role.



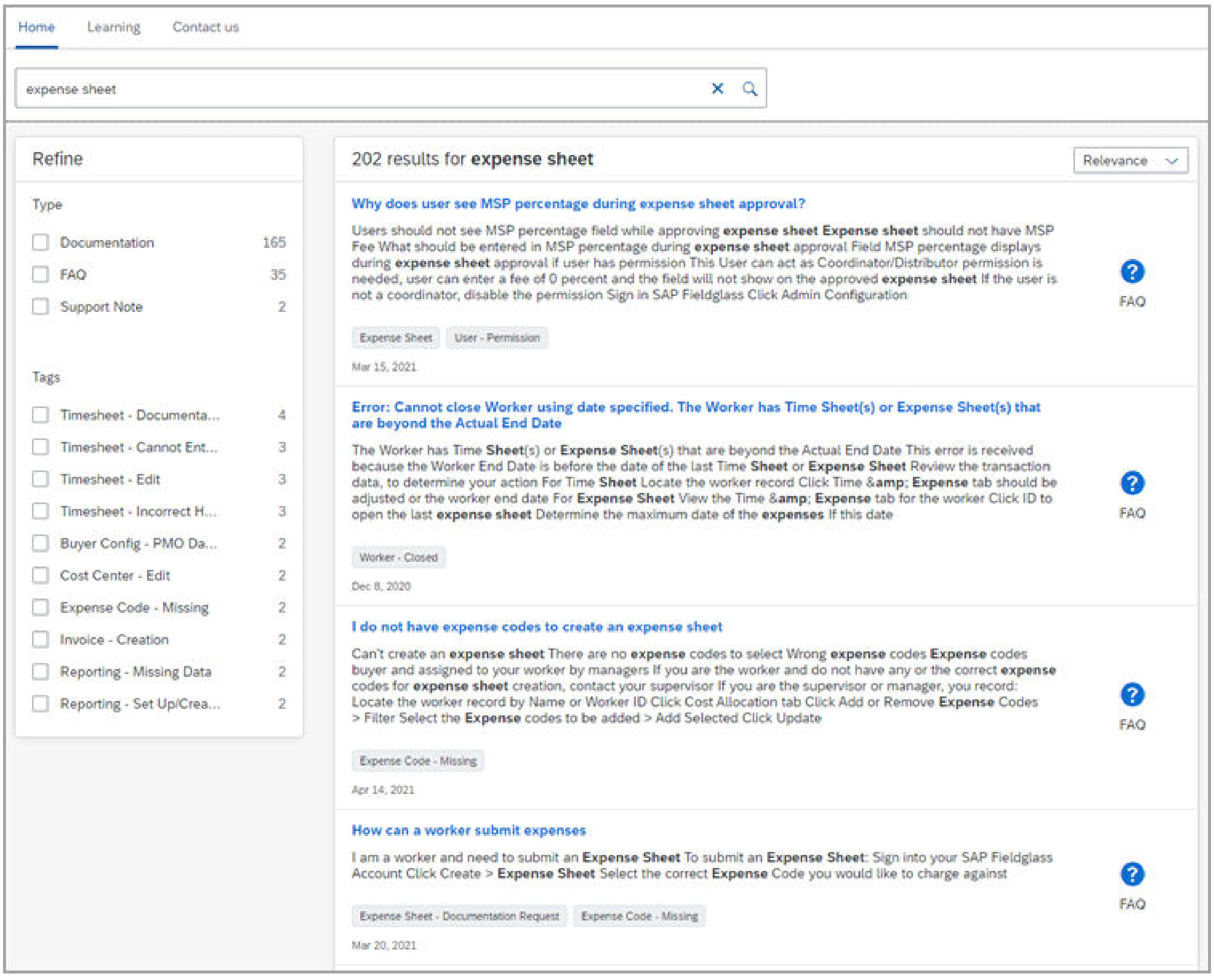
Help Center Home

Searching for Content in the Help Center

You can quickly access a list of applicable documents and FAQs based on your search criteria.

Context

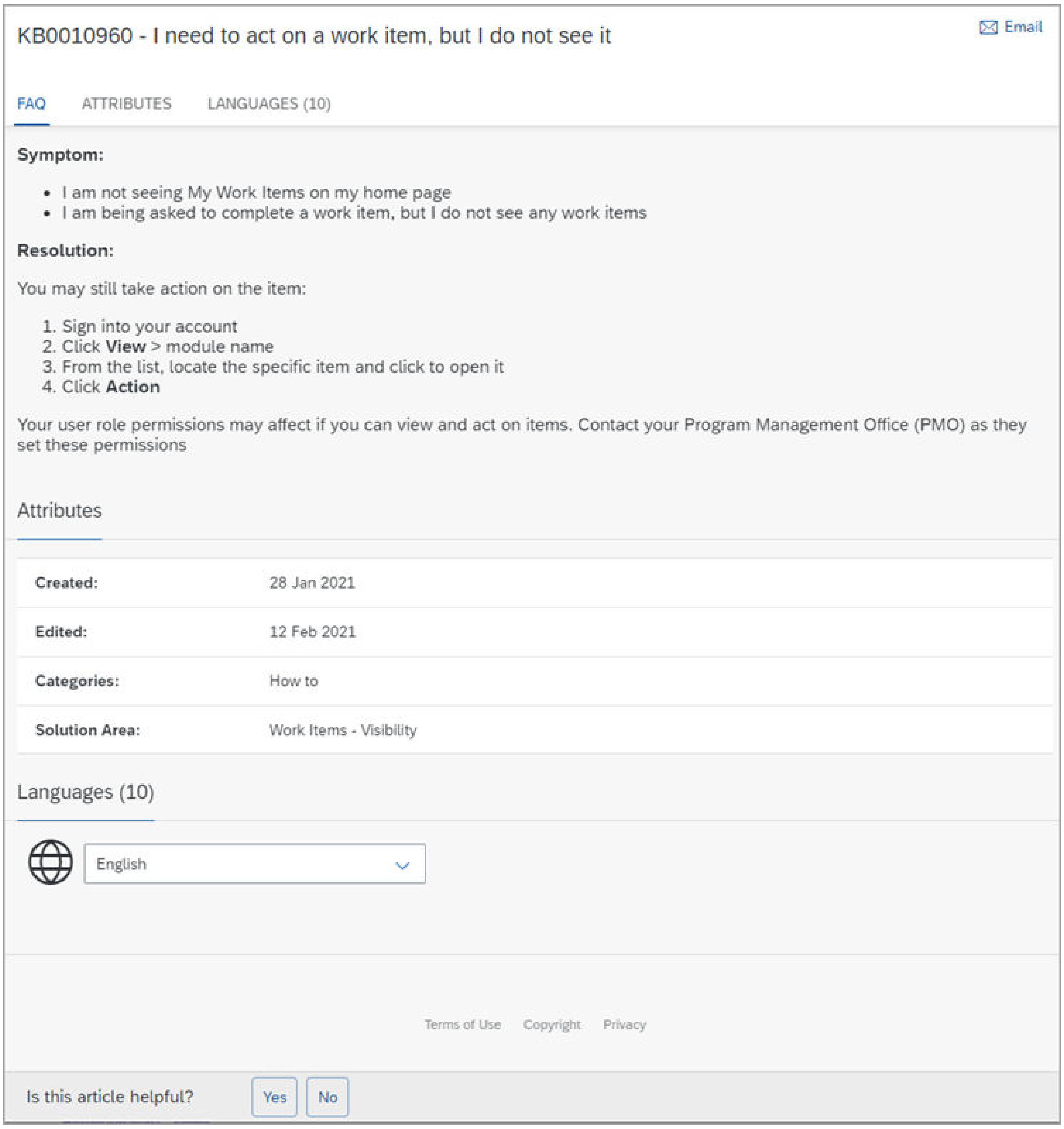
Searching across all content will show results from our FAQs and support documentation. To search for content in the Help Center, enter your text in the **How can we help you?** field and initiate your search to display the results. The results display with a **Refine** menu so that you can continue narrowing your results as needed.



Procedure

1. Use the checkboxes in the **Refine** menu to narrow the results or select one of the tags below the preview text in the results list. The new results display.

2. To view a related FAQ, select the question link or the **FAQ** (?) icon. The article displays.



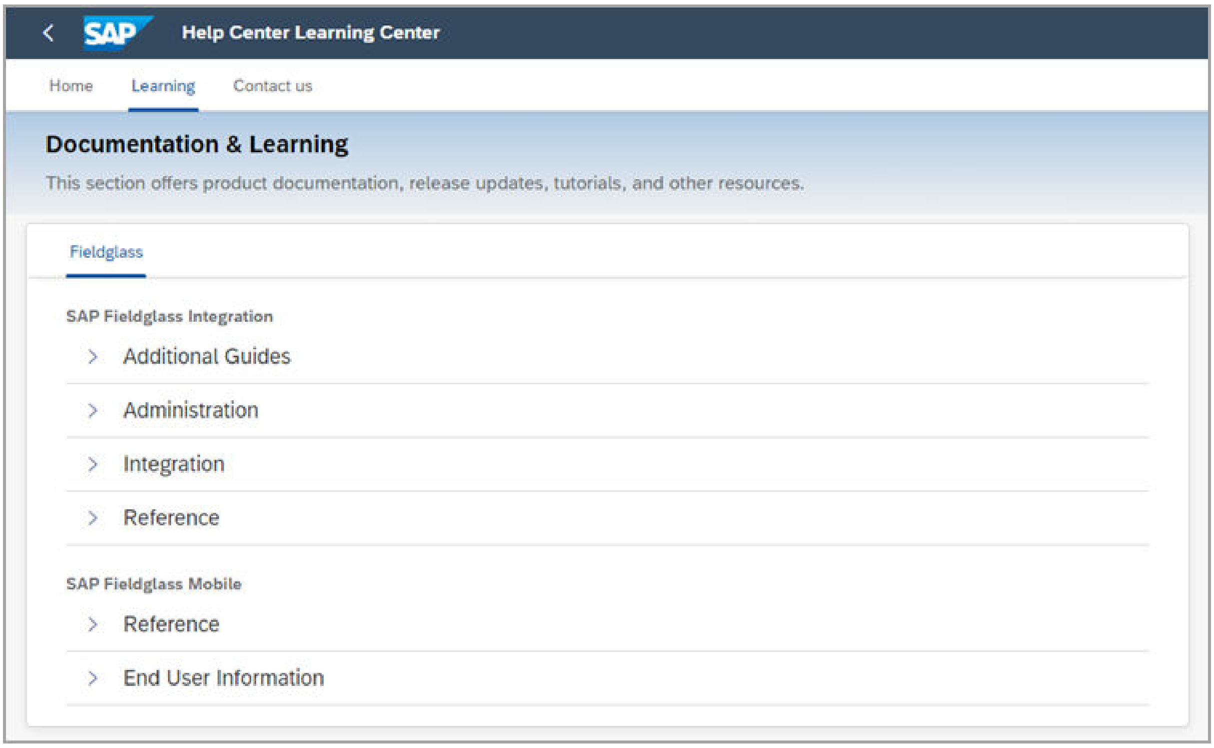
3. To change the language for the displayed article, select one from the list of available options in the Language section.
4. To provide feedback on a topic, choose Yes or No for **Is this article helpful?**. A comments box will display where you can provide additional feedback.
5. Once you're done viewing a topic, you can return to the Home tab using the back arrow (<) in the header area.

Browsing and Opening Support Topics in Learning

You can browse through a list of topics organized into categories to find content available in our Knowledge Base and the SAP Help Portal.

Context

To browse through a list of available documents, select the **Learning** tab, then follow the steps below.

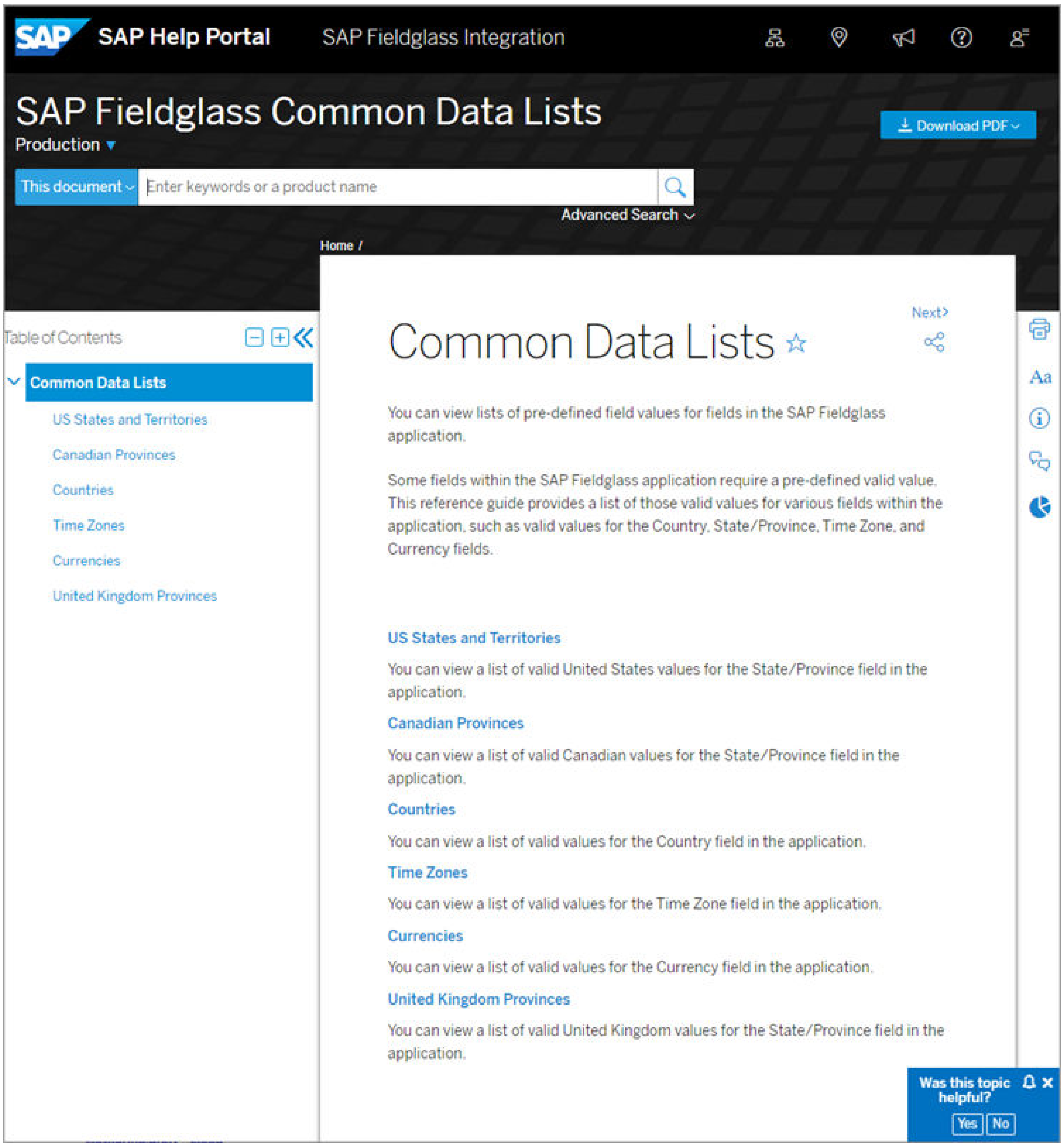


Help Center Learning Tab

Procedure

1. To see a list of available documents, expand a category.
2. Select the link to open a document. Product documentation opens in the SAP Help Portal in a new tab of your browser. You can continue to browse through the documentation

on the SAP Help Portal, or you can return to the Help Center tab in your browser.

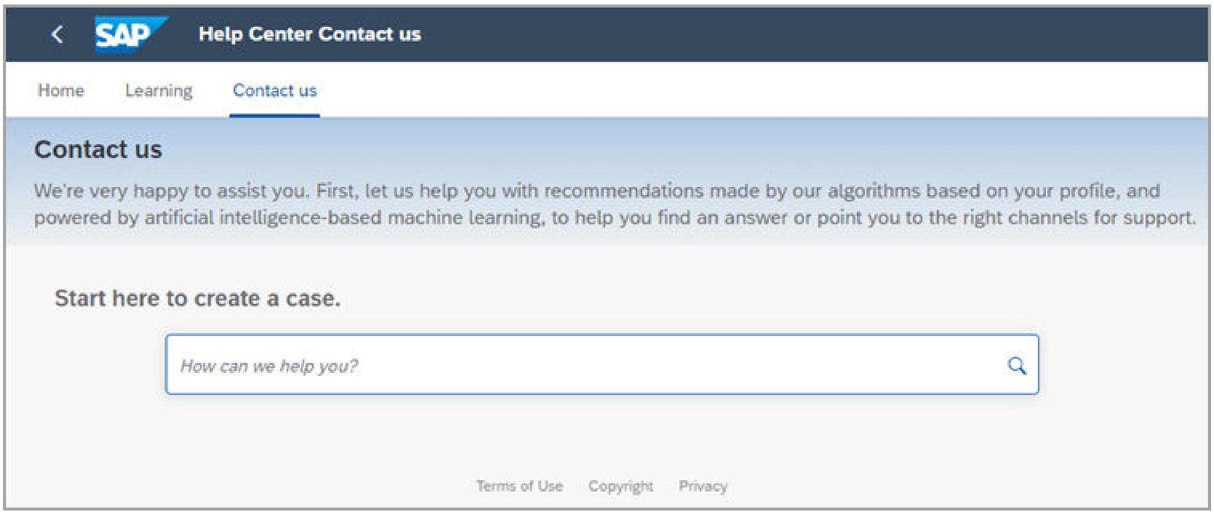


Using Guided Assistance for Support

Guided assistance is provided to help you quickly troubleshoot issues and ensure that you are directed to the right person or team for the support you need.

Context

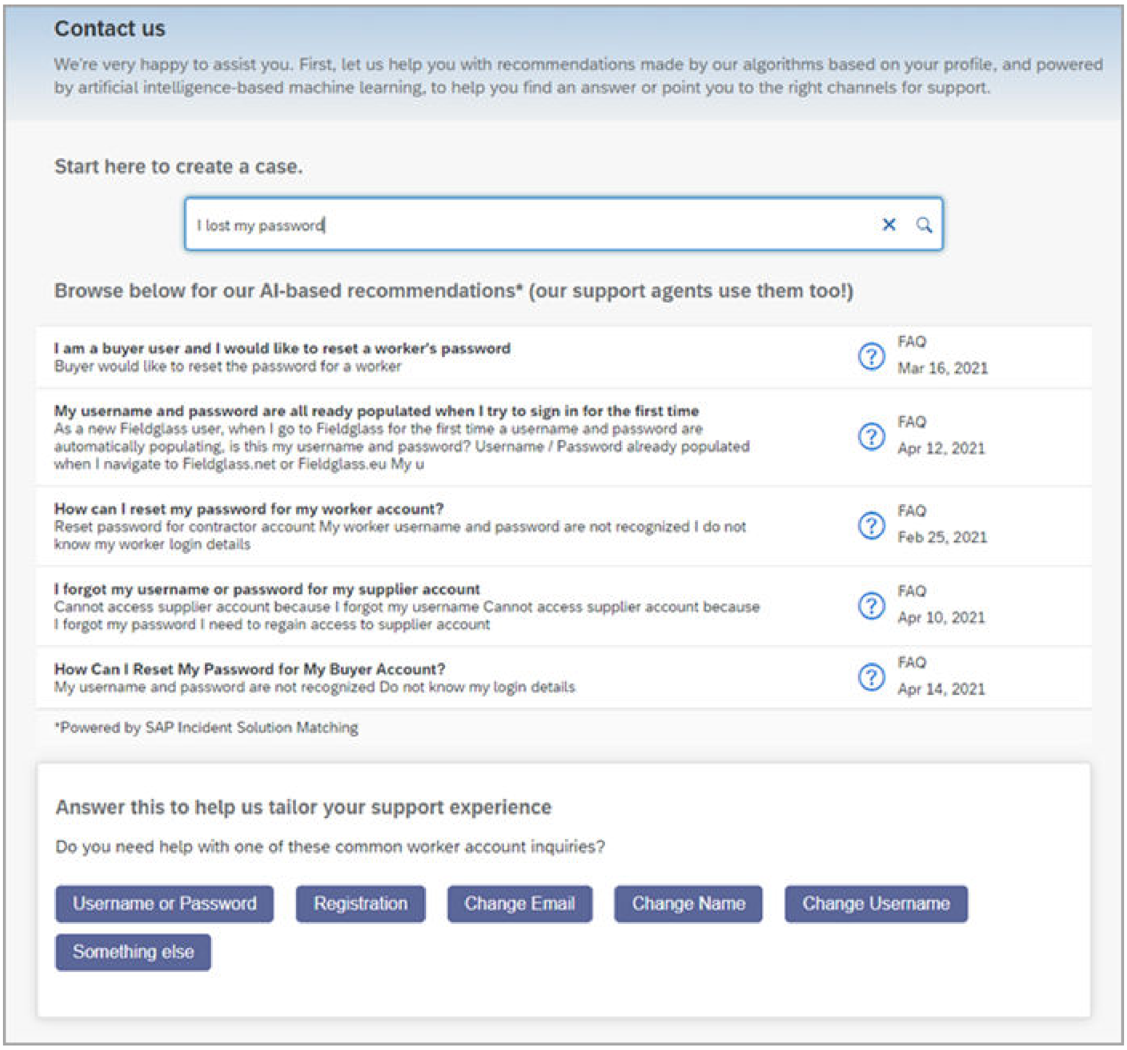
If we can't resolve your issues with the provided assistance, we'll provide a contact who can, or we'll guide you through the process of creating and submitting a support case. To get started with guided assistance, select the Contact Us tab and follow the steps below.



Procedure

1. Enter key words in the search box to describe the issue you need help with. Initiate the search to see a list of recommended topics.

2. You may be asked to refine your query by choosing an option from some common inquiries related to your issue. Select an option, if applicable.



3. Continue to provide information for guided assistance. Once enough information is given, you'll be provided with steps to resolve your issue or you'll be given instructions on who to contact for support.

Results

If we are not able to resolve your issue using guided assistance, a **Contact Us** button will display so you can begin creating a support case.

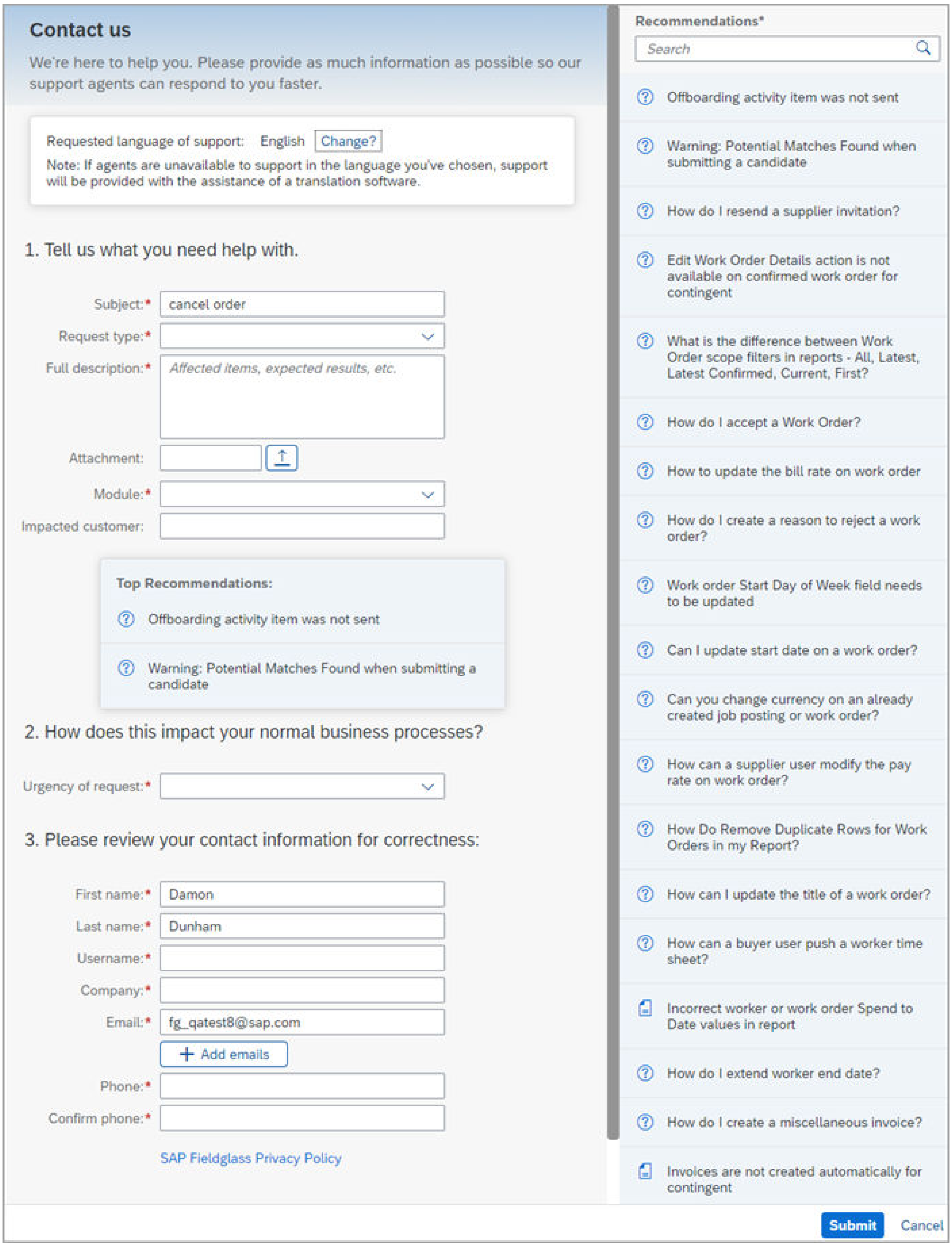
Submitting a Support Case

You can easily submit a support case if you are unable to find solutions in FAQs and support documentation.

Context

The case submission form is personalized based on your user type (Buyer, Supplier, Worker, PMO). Note that some fields will default based on your SAP Fieldglass account information and values you entered in the search field prior to accessing the case submission form.

To create a case, select **Contact Us** and then follow the steps below.



A list of recommended support topics display on the right side of your screen. As you fill out the support case, the list will update to show relevant topics.

Before beginning, you can change the language if desired.

Procedure

1. The **Subject** defaults from the value you entered in the previous search. If necessary, change the **Subject**.
2. Select the **Request Type**. Available values are based on your user type.
3. Provide a **Full Description**. You can include attachments using the upload button.
4. Select the **Module**. Available values are based on your user type.
5. Select the **Urgency of request**. If you select High or Very High, you'll be prompted to provide additional details.
6. Continue to enter your contact information and provide any optional information as needed.
7. Once the form is complete, select **Submit** and then select **OK** to confirm the submission.

   After submitting a case, you can view it (along with other submitted cases) on the **Contact Us** tab. You can also provide an update or request a follow-up. Follow-ups you provide through Help Center are listed under the **Follow-Ups** tab; updates from SAP continue to be tracked only via email.

8.2 Release Communication Document

The Release Communications document contains information about new features and enhancements for the most current release.

Release Communications are available from the **Help** menu along with the Feature Administration guide for users who have the View Administrative Product Documentation feature access selected. You can also access these documents by selecting the **SAP Fieldglass Release Communication - Click here to see what's new** link that displays by default on the Home page. Selecting the link opens a new browser tab and displays the different documents relating to the changes and enhancements associated with a release. The Release Communications document includes both a summary of changes and expanded details for larger changes.

8.2.1 Accessing Release Communications

The Release Communication document for the current release is available on the SAP Help Portal from within the SAP Fieldglass application.

Context

To access release communication, on the **Help** menu, select **Release Communication**. The document for the current release opens on the SAP Help Portal in a new browser tab.

8.3 Product Documentation Access on the SAP Help Portal

Product documentation and release communications are now available on the SAP Help Portal from within the SAP Fieldglass application. The information available corresponds to functional roles in the system (buyer administrator, buyer, supplier, or worker).

Documentation available covers a wide range of concepts, features, and tasks, providing you with important information on how to configure and use SAP Fieldglass functionality. Available guides replace and substantially improve on content previously available from Page Help and Online Help links in the application, which have been removed in this release. You can now find this content by searching in the relevant guide on the SAP Help Portal. Depending on your functional role in the system, different guides are available.

8.3.1 Accessing Product Documentation

SAP Fieldglass product documentation, organized into several guides, is available on the SAP Help Portal and is accessible via the SAP Fieldglass application.

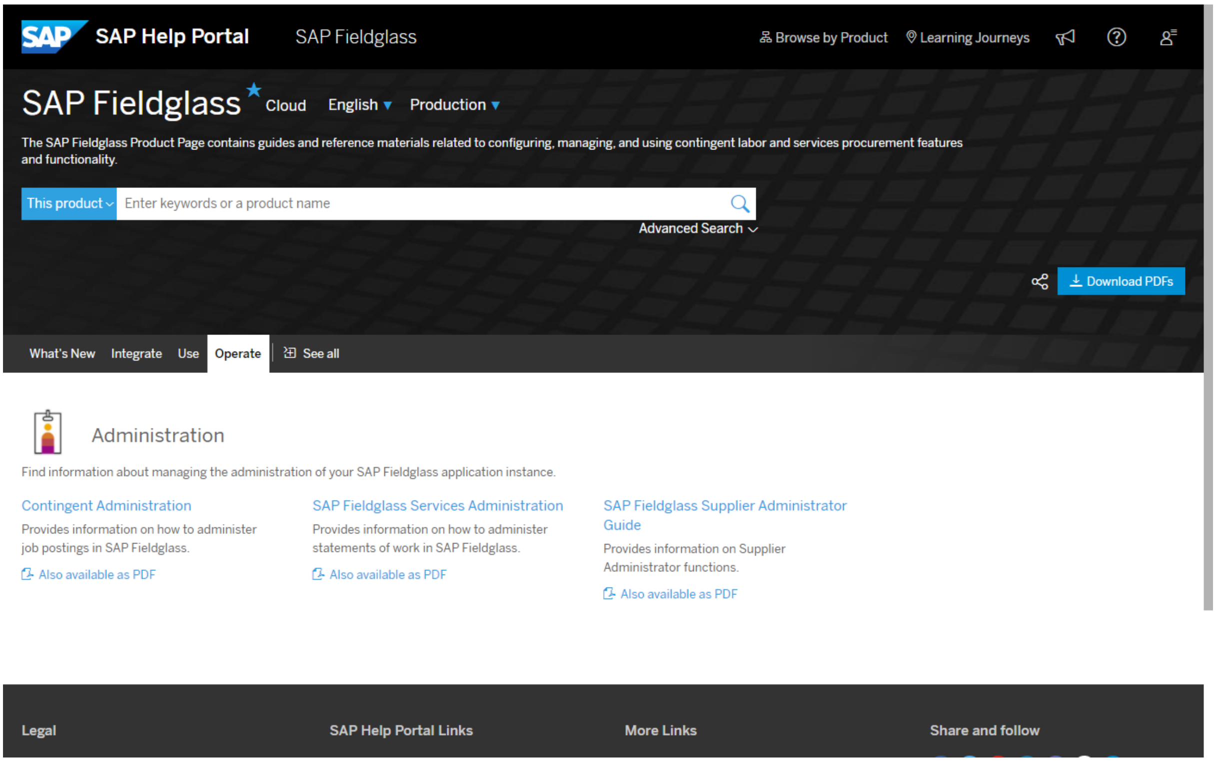
Context

To access product documentation, on the **Help** menu, select **Product Documentation**. The SAP Fieldglass product page opens on the SAP Help Portal in a new browser tab, displaying links to guides available to your functional role in the system.

8.3.2 Navigating the SAP Fieldglass Product Page

From the SAP Fieldglass product page, you can view individual guides, search, and provide feedback on content.

The SAP Fieldglass product page is organized into tabs (visible if any content is available for a tab). Within each tab, information is organized further into sections containing one or more links to individual guides. Select a guide to open it in another browser tab.



The SAP Fieldglass Product Page on Help Portal (with Operate Tab Selected)

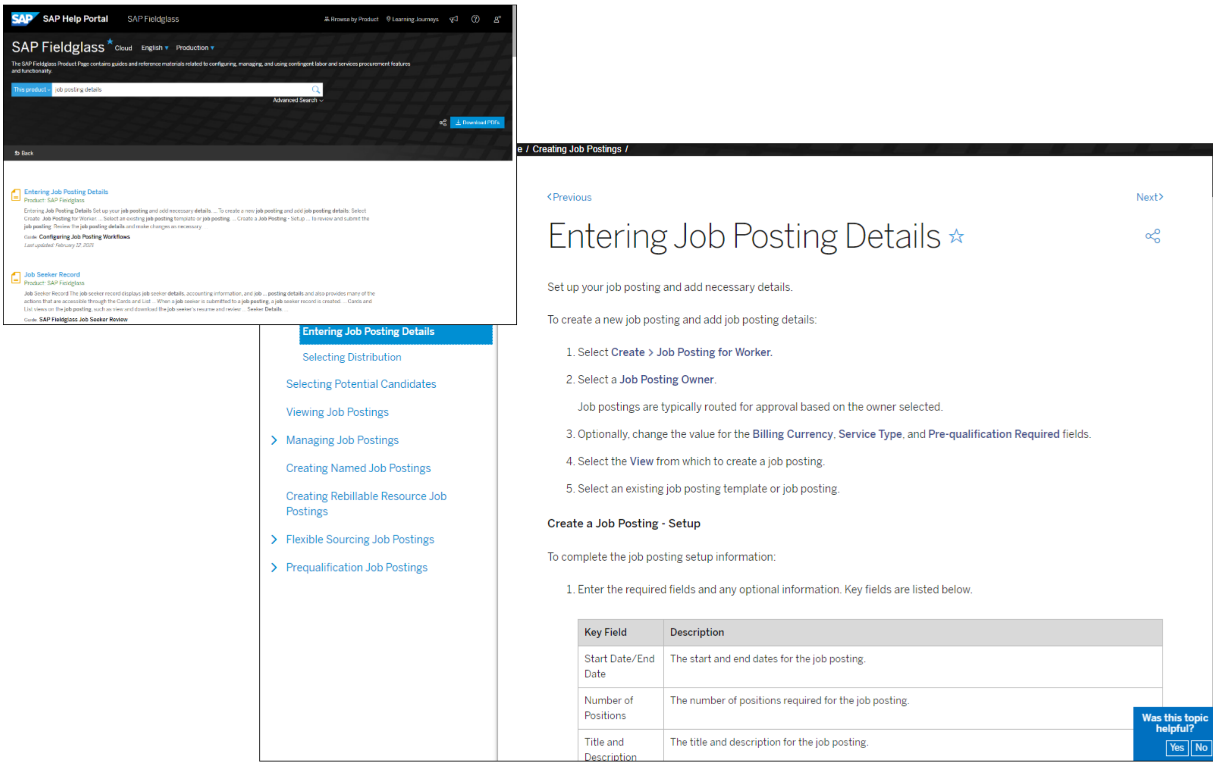
Each guide includes a table of contents that you can use for quick access to individual topics. If additional topics are available, you can select the expand arrow next to the table of contents entry. The first topic in each guide provides information about changes to the guide since the last publication.

PDF versions of individual guides can be accessed via the **Download PDF** button within each guide.

If you want to return to the main SAP Fieldglass product page from within a guide, at the top of the window, select **SAP Fieldglass**.

Searching

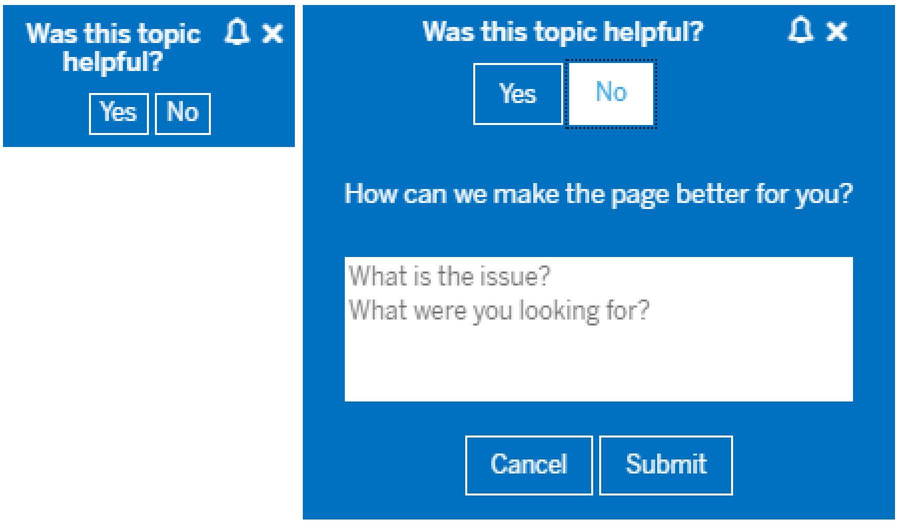
You can search using the search bar at the top of the page. Searches on the main SAP Fieldglass product page search the entire available SAP Fieldglass documentation library, while searches performed within a specific guide are limited to content within that guide. Advanced search capabilities provide additional precision for locating information.



Searching from the SAP Fieldglass Product Page and Viewing Results

Providing Feedback

At the bottom right of each topic in Help Portal guides, a small dialog asks **Was this topic helpful?** Once you select your answer, you can optionally provide anonymous feedback that is sent to the guide's authors. We highly encourage feedback to help us make content improvements for all customers.



Providing Feedback for SAP Help Portal Topics

8.4 Reference Library

Use the Reference Library to upload documents and other attachments in the application.

Attachments such as documents, photos, and other files can be uploaded to the Reference Library.

Upload a Document

To access the Reference Library, select the **Help** icon in the header bar and choose **Reference Library**. Once documents have been uploaded, they display in the Reference Library list. Documents can be sorted according to your preferences using the various filters.

1. To upload a document, select **Upload Document**.
2. Enter the information for the document's **Name**, **Description**, and **Category**.
3. Under **Visible To**, select **Buyer Users**, **Suppliers**, or **Workers** depending on which users you would like to have document visibility.
4. Select **Browse** to choose your document and select **Attach**.
5. Select **Add**. The attachment appears in the Reference Library list.

Edit or Remove a Document

- To edit an attachment from the Reference Library list, select **Edit**, edit the information, and choose **Update**.
- To remove an attachment from the Reference Library list, select **Edit**, and choose **Remove**.

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