SAP Fieldglass

INTERNAL – Authorized for SAP Customers and Partners
SAP Fieldglass

Account Management for Workers

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Content

1 What's New in This Guide

A summary of recent changes to the Account Management for Workers guide.

Updated Date	What's New	More Information
November 2022	Added the 'Vertical Navigation' topic.	FGL-95657

2 Account Management

Once you've created your worker account, there are options to adjust your settings and update your account information.

When you're invited to create an account in SAP Fieldglass, you're asked to set up your credentials and then select some options for your account. After initial setup, you can make adjustments as needed. Some things to consider:

- When creating your account, the SAP Fieldglass password requirements display in the Log In Details section. You'll need to adhere to this password policy when setting your password.
- The languages available are based on the company's enabled system languages.
- Your preferences are specific to you. Company-wide settings, such as time zone and date format, may be different.
- After a certain amount of idle time, you're signed out. Approximately 90 seconds before the time-out, you're asked if you would like to keep working. If you don't respond, you're automatically signed out.
- To sign out, select your profile avatar and then select **Log Out**.

To sign back in to your account, you must provide your username and password. If you've forgotten either, you can use the In-App Assistant to help you retrieve the information. To access the assistant, select the **Need Help Signing In?** link on the sign-in page.

2.1 Home Page and Navigation

Once you've signed in to SAP Fieldglass, the Home page displays where you can create and manage your account-related content.

Your home page contains widgets that show actions you can take such as creating absences and expense sheets, as well as work items that require your attention including submitting time sheets or completing tasks.

Menus and Navigation

Use these menus to navigate to various areas in the application.

- **Home** - Use to navigate to your home page from anywhere in the application.
- **View** - Use to view existing documents such as time sheets, expense sheets, absences, and messages.
- **Create** - Use to create new documents such as expense sheets and absences.
- **Help** - Use to access product documentation, support documentation, and release communication. This is the (?) question mark icon on the top right.
- **Settings** - Use to view and update your account information, settings, and preferences. Icon to the right of the question mark. It has your initials or picture.

> **i Note**
>
> Note that if you choose the **Vertical Navigation** option, menu items display in a different format. See Vertical Navigation [page 5].

Online Help and Support

The following support options are available:

- Updates to the application are available in the release communication document that's accessible from the home page link or via the help menu.
- To access documentation that can assist you in learning how to use SAP Fieldglass, select **Product Documentation** from the help menu.
- To access support documentation or to submit a support ticket, select **Contact Us** from the help menu.
- If you've forgotten your username or password, use the SAP Fieldglass In-App Assistant on the sign-in page to request your username or reset your password.

2.1.1 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.

The Vertical Navigation option displays categories and modules normally found on the View menu in a panel on the left-hand side of the application's Home page. It also places Messages in the header bar. To enable the Vertical Navigation option, select the **View Feature Switch** button (located in the top-right corner of the header bar) and select the **Vertical Navigation** option.

> ℹ Note
>
> The categories displayed on the side panel are found on the View menu and Create menu when the Vertical Navigation option is disabled. Be aware that when reading documentation, steps may include navigating to the View or Create menus; however, using the Vertical Navigation option eliminates the need for this step, as all the categories are already conveniently displayed on the side panel.

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. Selecting the arrow located on the side panel collapses it to display categories as icons only. Selecting an icon opens the respective modules in a popup list.

The Create menu is accessed by selecting the **Create** button located under the side panel's categories. Selecting this opens the Create menu, which displays the Create modules.

The Help menu, normally found on the header bar, is located at the bottom of the side panel. Selecting the **Help** button expands to open a smaller panel with the Help menu options.

2.1.2 Completing Work Items

Work items are tasks that are assigned to you for completion.

Context

Work items that require your attention display in the **Work Items to Act Upon** widget on your home page.

> **i Note**
>
> Time sheets that need to be completed also display in this list. Refer to the **Time and Expense Management for Workers** guide for information on completing them.

Procedure

1. Select the work item link from the list. Details such as due date, prerequisites, frequency, etc. display.
2. Select **Mark as Complete**.
3. Enter the **Completion Date** and any **Comments** you wish to add.
4. Select **Mark as Complete** to complete the item.

2.1.3 Viewing Milestones

Milestones are events that are assigned to you for onboarding and assignment management.

Context

To view your milestones, select **View** > **Milestone** and then follow these steps:

Procedure

1. Select a milestone in the list to open it.
2. Milestones that require completion have a **Mark as Complete** button in the upper right corner. Select the button and then enter a completion date to mark the item complete.

2.1.4 Viewing Messages

Messages are notifications that are sent to you related to tasks that require your attention, alerts about important information, and system broadcasts such as maintenance windows.

Context

Messages appear in the Message Center. Messages are color coded based on the type of notification: Alerts, Notifications, and System Broadcasts. You can filter the list by message type or message status (read or unread), or you can search messages text.

To view your messages, select **View** > **Messages** and then follow these steps:

Procedure

1. To view a message, click anywhere in the subject line. Unread messages display with bold text.
2. Review the message. Select **Remove Message** if you want to delete the message.
3. Select **Next** or **Previous** to navigate from one message to another.
4. Select **Back to Messages** to return to the message list.
5. Use the checkboxes in the list to **Mark as Read** or **Remove Selected**.

2.1.5 Selecting Favorite Tasks

Task codes that are assigned to you can be added to a favorites list so that they're easily accessible when entering time.

Context

To select your favorite tasks, use the **Select Favorite Tasks** option on the home page and then follow these steps:

Procedure

1. Select an assignment to get started. The **Select Favorite Tasks** form page displays.
2. Task codes that are assigned to you appear in the list. Select the codes you wish to add as favorites.

3. Select **Add Selected** to add the task codes to the **Select Favorite Tasks** list.
4. Select **Update**.

2.2 Profile and Preferences 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 menu options under **Settings**:

- My Profile
- My Preferences

2.2.1 Your Profile Settings

On the My Profile page, you can view and edit your account information and manage your mobile app registration and authorized devices.

To access your profile settings, click your account menu icon from your home page, and select **My Profile**.

The My Profile page contains the following sections:

Contact Information

Contains your email address as well as personal and contact information. You can edit your email address and your physical address at any time.

Account Information

Contains your account credentials such as your username, password expiration, and your role. You can change your username and update your password as needed.

Linked Accounts

Contains a list of your linked accounts and also shows accounts that are linked to yours.

Mobile Apps

Contains a list of your registered devices if you're using the Time Entry mobile app. This is also where you generate a QR code to register new devices.

Changing Your Username and Password

Update your username or change your password.

Context

To edit your username, select **My Profile** from the settings menu and click **Edit** in the **Account Information** section. Make the necessary changes and then click **Update** to complete the action.

A link to change your password is available in the **Account Information** section in your My Profile page. Note that you don't need to select **Edit** to complete this action. To change your password, select **My Profile** from the settings menu and then follow these steps:

Procedure

1. Select the **Change Password** link. The Change Password dialog box opens.
2. Enter your **Current Password**.
3. Enter your **New Password**.
4. Enter the new password again to confirm it.
5. Select **Change**.

Results

Your password is changed. If you've forgotten your username or password, use the SAP Fieldglass In-App Assistant on the sign-in page to request your username or reset your password.

Editing Your Contact Information

Update information such as your email address, physical address, and phone numbers.

Context

The section that is titled with your name is where you can update your basic information and your contact details. To update the information, select **My Profile** from the settings menu and then follow these steps:

Procedure

1. Select **Edit**. Your Basic Information and Contact Information displays on the page.
2. In the Basic Information section, update your **Email** address and/or add or remove **CC Email Addresses**.
3. In the Contact Information section, update or add your physical address and your contact phone numbers.
4. If desired, add or update your **LinkedIn Profile URL**. The URL you enter here is displayed as a link on your user profile and is visible to the supplier as well as the buyer company for whom you're working.
5. Select **Update**.

Results

The information is updated. Information such as your email address and contact details is also updated on your user profile that is visible to the supplier as well as the buyer company for whom you're working.

Managing Your Linked Accounts

You can manage accounts that are linked to this account, or add or remove accounts that are linked from this account.

Context

If you have multiple accounts, you can link to those accounts to make it easy to navigate back and forth between them. The Linked Account section contains options that allow you to add or remove linked accounts, enable or disable the ability for other accounts to link to this account, and add or remove accounts that are linked from other accounts.

Your linked accounts display in the account menu, which is available from your user icon on the home page. You can navigate back and forth between accounts by selecting an account from the list.

i Note

You need the sign-in credentials for the accounts you want to add to your list of linked accounts.

To update your linked accounts, select **My Profile** from the settings menu and then follow these steps:

Procedure

1. Select **Edit** in the Linked Accounts section.
2. To add an account, select **+ Add Linked User Account**.
3. Enter the **Username** and **Password** for the account you want to add.
4. Optionally enter a **Nickname** and **Sort Order**.
5. Enter the password for the account you're currently signed in to.
6. Select **Add**.

Results

The account is added to your list of Links from this User Account. A link to the account is available from your account menu on your home page.

Managing Your Mobile App Devices and Registration

View and remove registered devices or generate a QR code to register a new device.

Context

If you're using a mobile app, you can generate a QR code to register a new device or remove registered devices that you're no longer using. To register a new device, you need to download the desired mobile app on your device and initiate the registration process in the mobile app.

When you're ready to scan a QR code, you need to access the desktop application and navigate to your profile to generate a QR code. An option on your mobile device allows you to manually register a device without a QR code. To retrieve the necessary information for the manual setup, click the link in the text above the Generate QR Code button.

To remove registered devices, select **My Profile** from the settings menu and then follow these steps:

Procedure

1. Scroll to the mobile apps section and locate the mobile app you want to view.
2. Locate the device you want to remove in the list. Device Name, Device OS, Device Type, and Registration Date display for each registered device.
3. Click **x Unregister** next to the desired device. The Unregister Device dialog box displays.
4. Click **OK** to confirm the action.

Results

The device no longer appears in the list.

2.2.2 Editing Your Preferences

Your account preferences include settings for locale, home page and application, and messaging.

Context

To update your preferences, select **My Preferences** from the settings menu and then follow these steps:

Procedure

1. To edit your locale settings, select **Edit** in the **Locale** area and make adjustments as needed. You can change your preferred time zone, language, date format, time format, number format, and start day of week.
2. To edit your home page, select **Edit** in the **Home Page and Application Settings** area and make adjustments as needed. You can change the color theme and you can show or hide the widgets that appear on your home page.
3. To adjust your messaging settings, select **Edit** in the **Messaging** area and make adjustments as needed. You can change your preferred email format and choose which types of messages you want to receive emails for.

2.3 Absences

SAP Fieldglass provides tools that allow you to notify your management when you're absent and when you plan to be absent.

If the buyer company allows you to submit absences, you're provided with an option to create and submit your time-off. You can submit and view your absences from your account at any time. To view absences that you've already submitted, select **View** > **Absence** and select one from the list.

This information is informational only and doesn't require approval.

2.3.1 Submitting Absences

You can create and submit absences directly from your home page or via the Create menu.

Context

To create an absence, select **Create** > **Absence** and then follow these steps:

Procedure

1. Enter the **Start Date** and **End Date**. To enter a single day or a partial day, enter the same date in both fields.
2. Select a **Reason**.
3. If you're entering a partial absence, select **Yes** for **Partial Day** and then enter the **Duration** in hours and minutes.
4. Select **Submit**.

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