SAP Fieldglass

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Supplier Equipment Monitoring Implementation Guide

Implementation Guide

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1 Introduction

Supplier equipment monitoring relates to equipment owned or rented by suppliers. The scenarios include both direct rentals from suppliers where customers own the rental contracts, and equipment that suppliers either own or rent and the suppliers own the rental contracts.

The integration of SAP Fieldglass and SAP S/4HANA Field Logistics Module allows suppliers and rental coordinators to manage equipment items as workers, using onboarding activity items to track and monitor the equipment. By updating the equipment lifecycle data in Field Logistics, the same data is then automatically updated in SAP Fieldglass, and therefore available to suppliers as well. With this integration, SAP Fieldglass leverages its equipment as a person feature for SOW workers, specifically using onboarding activity items to accomplish the visibility.

SAP customers with field logistics needs have multiple challenges related to the use of equipment owned or rented by suppliers. The integration described within improves the functionality related to equipment monitoring in order to reduce or eliminate the challenged areas.

2 About This Guide

This guide provides the information needed to configure SAP Fieldglass for Supplier Equipment Monitoring using SAP S/4HANA Field Logistics Module.

The guide describes the configuration tasks that can be performed by an SAP Fieldglass buyer, or a client administrator in the buyer's tenant, to successfully implement Supplier Equipment Monitoring integration. The tasks include creating worker roles that represent the equipment being monitored and creating a series of activity items and custom fields that form the infrastructure for the manifest used for tracking equipment.

Related Information

Create SOW Worker Roles [page 5]
Enable SOW Template to Configure SOW Workers and Fees [page 6]
Create Custom Fields for Activity Item Module [page 7]
Create Custom Fields for Activity Item Module - Supplier Manifest Activities [page 9]
Create Activity Item for Manifest and Link Custom Fields [page 11]
Create Activity Items for Activity Item Custom Fields [page 12]

3 SAP Fieldglass Buyer Setup

3.1 Create SOW Worker Roles

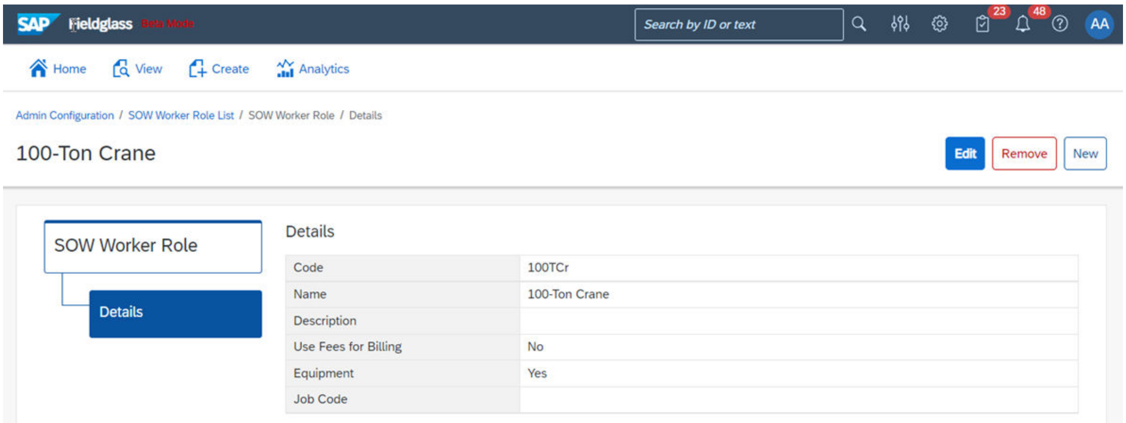
SOW Worker Roles are used to represent the type of equipment being managed and tracked.

Context

Create one or more SOW Worker Roles as described next.

Procedure

1. Log into the Buyer company, and in the upper-right corner of the page, choose the View Administration Menu icon.
2. Under *Services* choose *SOW Worker Role*.
3. Choose *New*.
4. Enter the following details:
    1. Enter a *Code* for the role, for example `100TCr`.
    2. Enter a *Name* for the role, for example `100-Ton Crane`.
    3. Enter a *Description* for the role.
    4. In the *Use Fees for Billing* option, leave the default value `No` in order for the worker role to show up appropriately for the events.
    5. In the *Equipment* option, choose `Yes`.
    6. Enter a *Job Code*, if applicable.



    7. Choose *Add*.

5. Repeat step 3 and step 4 to add more SOW Worker Roles as needed to represent the inventory being tracked.

3.2 Enable SOW Template to Configure SOW Workers and Fees

Context

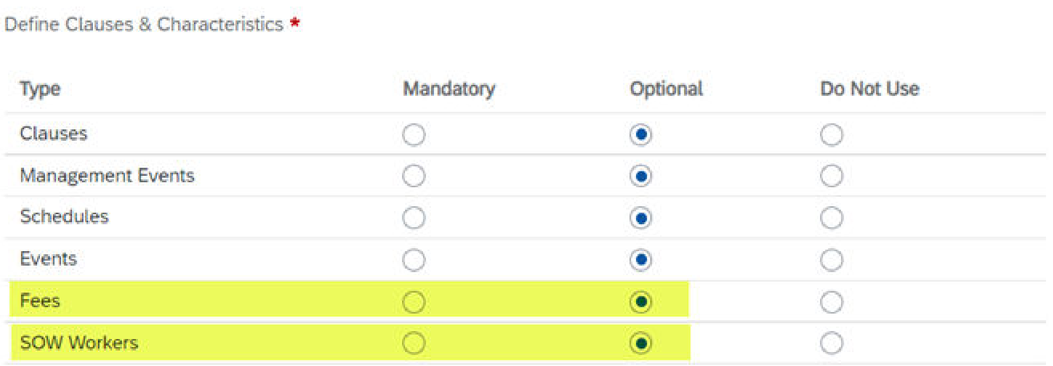
In order to configure work types for the equipment, enable the SOW Template to allow the configuration of SOW Workers and Fees.

Procedure

1. Log into the Buyer company, and in the upper-right corner of the page, choose the View Administration Menu icon.
2. On the Administration Menu under *Services*, choose *SOW Template*.
3. Choose the SOW Template you want to configure.

   The SOW Template details page opens.
4. Choose *Edit*.

   The Edit SOW Template: *<Name>* page opens.
5. Under *Define Clauses & Characteristics*, do the following for this integration:
   1. Choose the *Fees* type, and then choose `Mandatory` or `Optional`, based on your integration needs.
   2. Choose the *SOW Workers* type, and then choose `Mandatory` or `Optional`, based on your integration needs.



6. Choose *Update*.

3.3 Create Custom Fields for Activity Item Module

Use custom fields to monitor the lifecycle of activities for the equipment being monitored.

Context

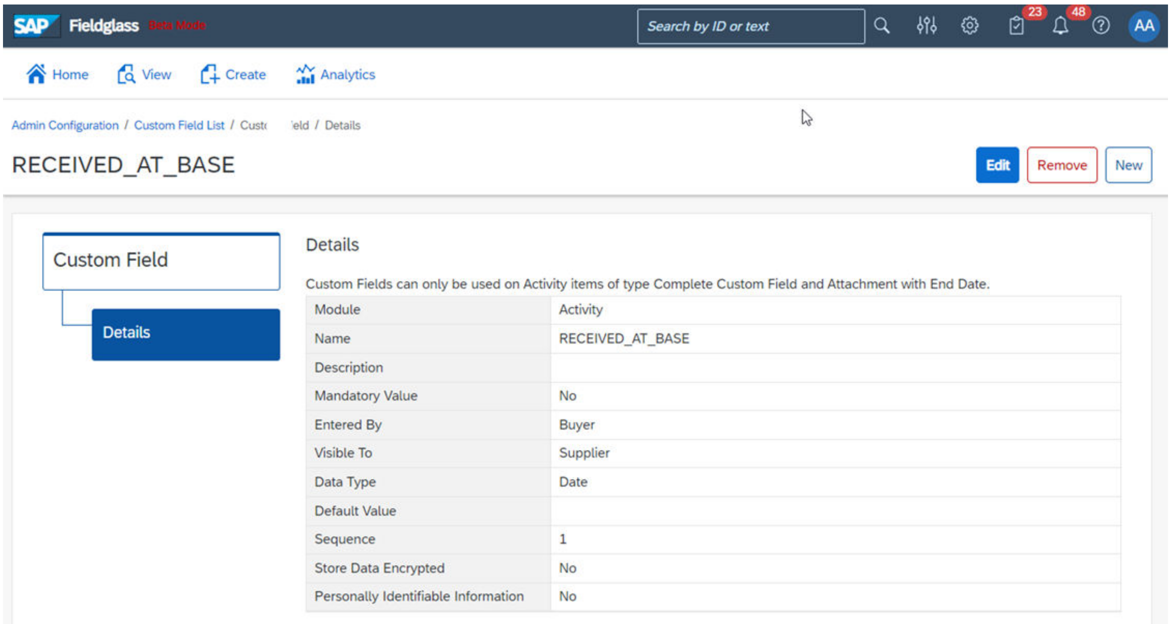
In the Buyer company, create custom fields for the *Activity Item* module, specifying the exact names, descriptions, and in the sequence listed in the following table. These custom fields are entered by the Buyer and visible to the Supplier.

Procedure

1. Log into the Buyer company, and in the upper-right corner of the page, choose the View Administration Menu icon.
2. On the Administration Menu under *Configuration*, choose *Custom Field*.

   The Custom Field List page opens.
3. Choose *New*.

   The Add New Custom Field page opens.
4. Set the following values:
   1. In the *Module* list, choose `Activity`.
   2. In the *Name* field, enter the first custom field name (sequence 1) from the table below.
   3. In the *Description* field, enter the description for the corresponding custom field name from the table below.
   4. In the *Data Type* list, choose `Date`.
   5. Leave the *Mandatory Value* default value set to `No`.
   6. Leave the *Entered By* default value set to `Buyer`.
   7. In the *Sequence* field, enter the sequence for the corresponding custom field from the table below.
   8. The *Default Value* isn't required.
   9. Leave the *Store Data Encrypted* option set to `No`.
   10. Leave the *Personally Identifiable Information* option set to `No`.
   11. In the *Visible To* option, choose `Supplier`.



5. Choose *Add*.
6. Repeat steps 3–5 to add the custom fields for sequences 2–8 from the table below.

Custom Field List: Buyer-Side

Sequence	Custom Field Name	Action
1	RECEIVED_AT_BASE	Received at base
2	READY_FOR_TRANSPRT	Ready for transport
3	TRANSPT_INITIATED	Transport initiated
4	RECEIVED_AT_REMOTE	Received at remote
5	RETURN_INITIATED	Return initiated
6	TRANSPT_INITIATED_RM	Transport initiated at remote
7	RECEIVED_BACK_BASE	Received back at base
8	RET_SUPPLR_INITIATED	Return to supplier initiated

3.4 Create Custom Fields for Activity Item Module - Supplier Manifest Activities

Custom fields are used to manage the activities related to the equipment being monitored. When a Supplier creates the equipment item, it informs the buyer of various specifications about the piece of equipment being sent.

Context

In the Buyer company, create custom fields for the *Activity Item* module, specifying the exact names, descriptions, and in the sequence listed in the following table. These custom fields appear on a manifest that the Supplier creates and populates with values to ensure the designated equipment fits in the shipping container, as well as other variables.

Procedure

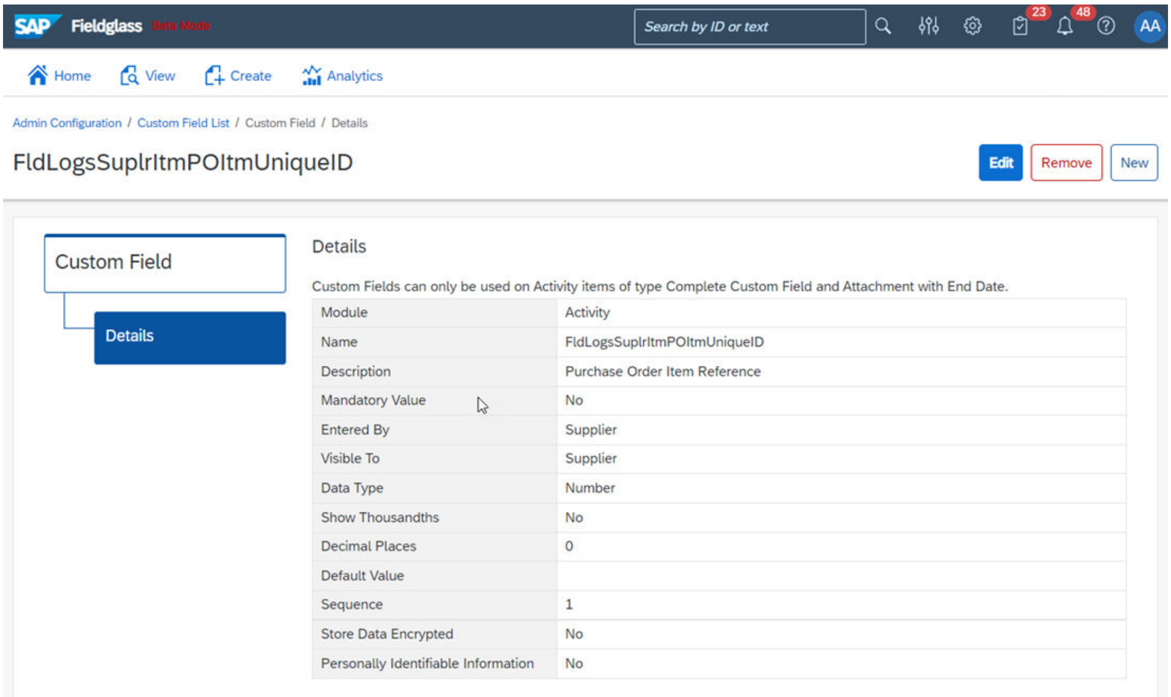
1. Log into the Buyer company, and in the upper-right corner of the page, choose the View Administration Menu icon.
2. On the Administration Menu under *Configuration*, choose *Custom Field*.

   The Custom Field List page opens.
3. Choose *New*.

   The Add New Custom Field page opens.
4. Set the following values:
   1. In the *Module* list, choose `Activity`.
   2. In the *Name* field, enter the first custom field name (sequence 1) from the table below, for example, `FldLogsSuplrItmPOItmUniqueID`.
   3. In the *Description* field, enter the description for the corresponding custom field name from the table below, for example, `Purchase Order Item Reference`.
   4. In the *Data Type* list, choose `Text`.

      > ⓘ Note
      >
      > An exception to the `Text` data type: If the `ItemIsDangerousGood` custom field allows the value `Yes` or `No`, then specify the data type as `user-defined pick list`.
   5. Leave the *Mandatory Value* default value set to `No`.
   6. In the *Entered By* option, choose `Supplier`.
   7. In the *Sequence* field, enter the sequence for the corresponding custom field from the table below.
   8. The *Default Value* isn't required.
   9. Leave the *Store Data Encrypted* option set to `No`.
   10. Leave the *Personally Identifiable Information* option set to `No`.

11. In the *Visible To* option, choose `Supplier`.



5. Choose *Add*.
6. Repeat steps 3–5 to add the custom fields for sequences 2–10 from the table below.

Manifest Custom Fields: Supplier-Side

Sequence	Custom Field Name	Action
1	FldLogsSuplrItmPOItmUniqueID	Purchase Order Item Reference
2	FldLogsSuplrItemSerialNumber	Item Serial Number
3	FldLogsSuplrItemQuantity	Quantity
4	FldLogsSuplrItemQuantityUnit	Quantity UoM
5	FldLogsSuplrItemGrossVolume	Gross Volume
6	FldLogsSuplrItmGrossVolumeUnit	Volume UoM
7	ProductGrossWeight	Gross Weight
8	ProductWeightUnit	Weight UoM
9	ItemIsDangerousGood	Dangerous Goods
10	FldLogsSuplrItemDngrsGdsCat	Categories of Danger

3.5 Create Activity Item for Manifest and Link Custom Fields

Context

In this task, the Buyer creates a new activity item for the Supplier manifest and links all of the custom fields described in the table "Manifest Custom Fields – Supplier-Side" in Create Custom Fields for Activity Item Module - Supplier Manifest Activities [page 9]. The custom fields appear on the manifest, which the Supplier is responsible for completing.

Procedure

1. Log into the Buyer company, and on the Administration Menu under *Workflow*, choose *Activity Item*.
2. Choose *New*.

   The *What Type of Activity Item Would You Like?* dialog box opens (step 1).
3. Choose the *Other* tile.

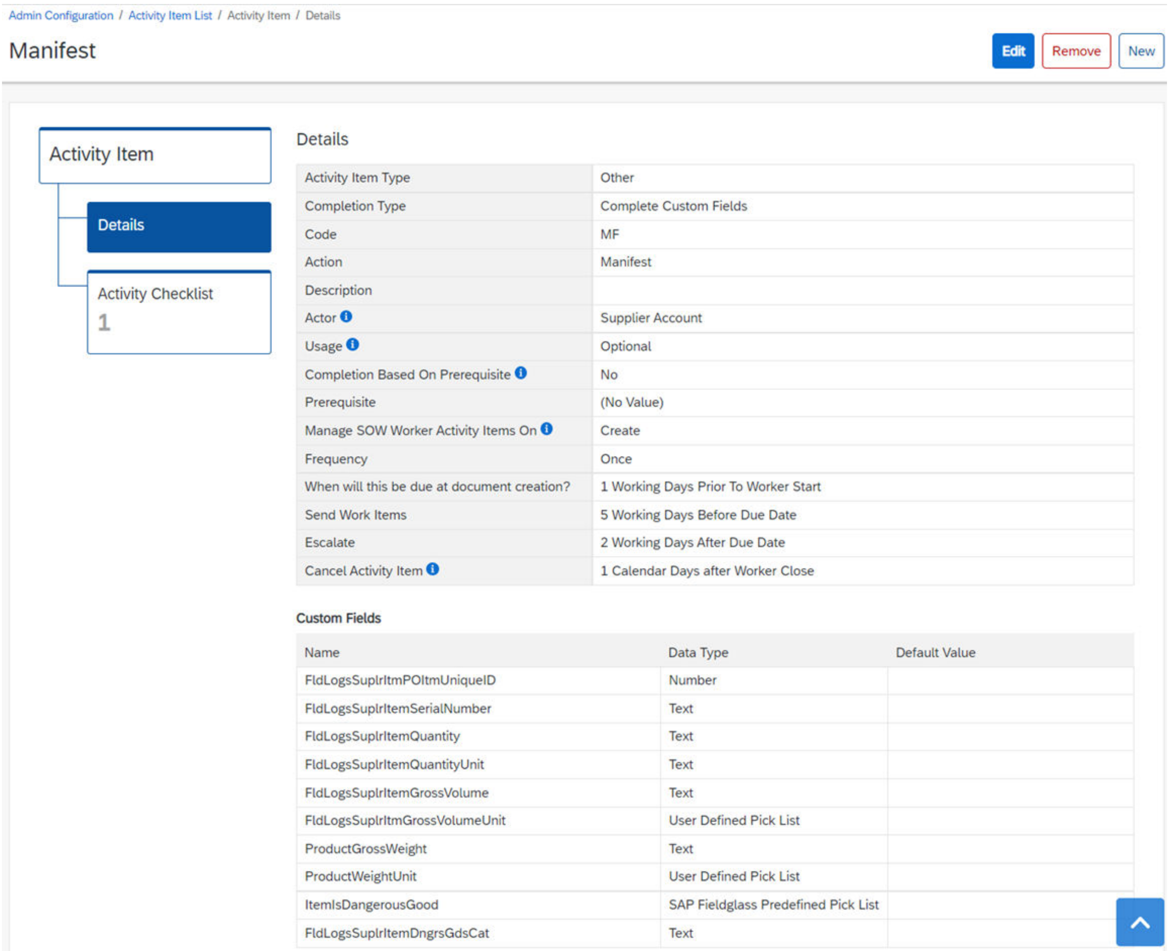
   The *Other* dialog box opens.
4. Choose the *Complete Custom Fields* tile.

   The *Add New Activity Item* page opens.
5. In the *Code* field, enter a code name for the manifest, such as `MF` or `Manifest`.
6. Enter the following details:
   1. In the *Action* field, enter `Manifest`.
   2. Enter an optional *Description*.
   3. In the *Actor* list, choose `(Supplier Account)` (required).
   4. Under *Usage* leave the default value `No` selected.
   5. The *Completion Based On Prerequisite* option is optional. If you choose `Yes`, under *Prerequisite* choose the *Select* button to add a prerequisite value.
   6. In the *Manage SOW Worker Activity Items On* option, leave the default value `Create` selected.
   7. In the *Frequency* option, leave the default option `Once` selected.
   8. In the *When will this be due?* list, choose an option.
   9. In the *Send Work Items* field, enter a value for the number of working days before the due date to send the work items.
   10. In the *Escalate* field, enter a value for the number of working days after the due date to escalate the activity item.
   11. In the *Cancel Activity Item* field, enter a value for the number of calendar days after worker close to cancel the activity item.
7. At the bottom of the page, choose *+ Add Custom Fields*.

The *Add Checklist Item Custom Fields* dialog box opens.

8. Select the check box next to each of the manifest custom fields you created in Create Custom Fields for Activity Item Module - Supplier Manifest Activities [page 9].
9. Choose *Add Selected* to add the custom fields to the activity item.
10. On the Add New Activity Item page, choose *Add* to add the new manifest activity item.

When you display the Manifest details, the custom fields display at the bottom of the page.



3.6 Create Activity Items for Activity Item Custom Fields

Context

In this task the Buyer creates individual activity items for each custom field described in the table "Custom Field List: Buyer-Side", as described in Create Custom Fields for Activity Item Module [page 7]. Each field gets its own activity item with the related custom field attached. During processing, each time an activity item is completed on the supplier system, that date is updated in the activity item in SAP Fieldglass.

If you want to use alerts and timeline planning, you can link each activity item to require its completion *n* number of days after the previous one. If a date is missed, it generates alerts to Number them so they list in sequence order. Manifest is sequence 1.

In addition, ensure all activity items are linked to the appropriate worker roles (equipment types) and suppliers, and all are visible to suppliers.

Procedure

1. Log into the Buyer company, and on the Administration Menu under *Workflow*, choose *Activity Item*.
2. Choose *New*.

   The *What Type of Activity Item Would You Like?* dialog box opens (step 1).
3. Choose the *Other* tile.

   The *Other* dialog box opens.
4. Choose the *Complete Custom Fields* tile.

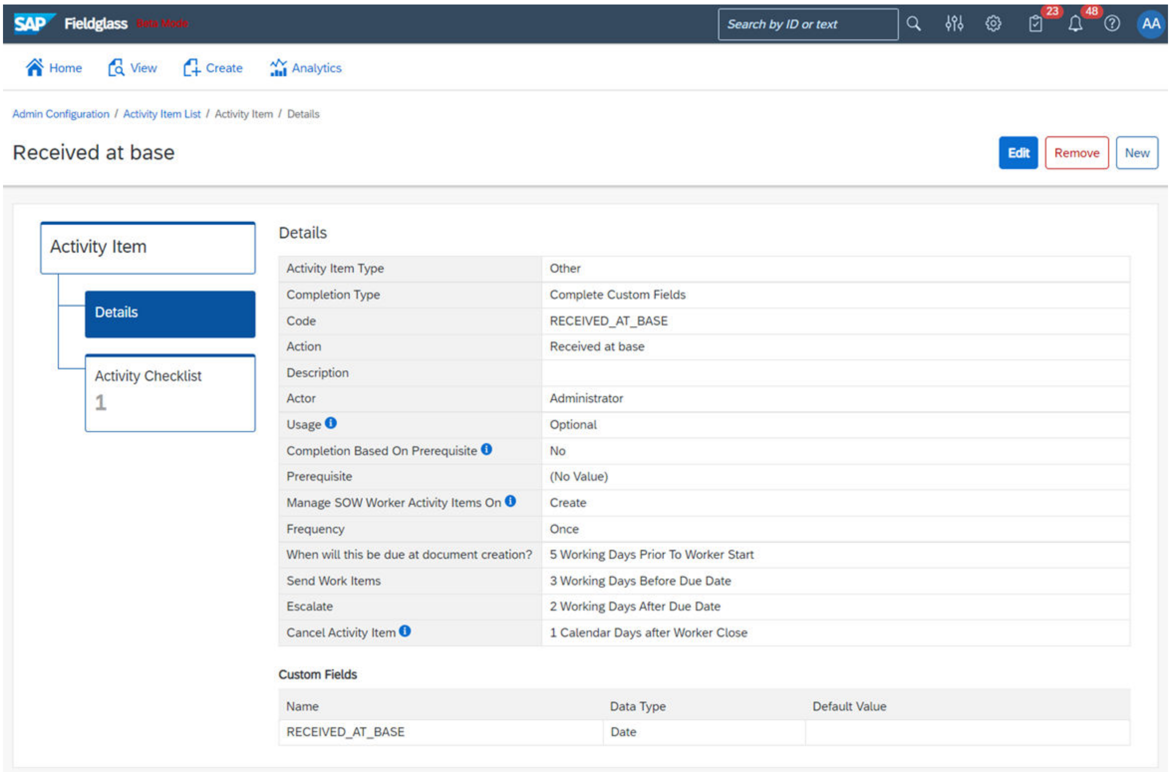
   The *Add New Activity Item* page opens.
5. Complete the following details:
   1. In the *Code* field, enter a code name for the manifest, for example, `MF`.
   2. In the *Action* field, enter `Manifest`.
   3. Enter an optional *Description*.
   4. In the *Actor* list, choose `(Supplier Account)` (required).
   5. Under *Usage* leave the default value `No` selected.
   6. *Completion Based On Prerequisite* allows you to use alerts and timeline planning to link activity items that require completion based on a prerequisite. If the timelines aren't completed on time, the customer receives notification alerts.
      To enable this optional feature, choose `Yes`, and under *Prerequisite*, click the *Select* button and choose a prerequisite value. Then configure all the remaining options.
      The best practice is to create completion values according to your timelines to ensure that everything gets completed on time. For example, the equipment arrived at the dock 2 days ago, but no one confirmed it's on a barge, or the equipment stopped being used, or the SOW was finished 2 days ago, but nobody's put it back on a barge and so you're still being charged for it.
   7. In the *Manage SOW Worker Activity Items On* option, the default value is `Create`. Change to `Create and Revise`, if needed.
   8. In the *Frequency* option, the default value is `Once`. Change to `Recurring`, if applicable.
   9. In the *When will this be due?* list, choose an option.
   10. In the *Send Work Items* option, enter a value for the number of working days before the due date to send the work items.
   11. In the *Escalate* option, enter a value for the number of working days after the due date to escalate the activity item.
   12. In the *Cancel Activity Item* option, enter a value for the number of calendar days after worker close to cancel the activity item.

> ⓘ Note
>
> Set the completion values according to your timeline to ensure everything is completed on time.

6. At the bottom of the page, choose *+ Add Custom Fields*.

   The *Add Checklist Item Custom Fields* dialog box opens.
7. Select the check box next to each of the Activity custom fields you created in Create Custom Fields for Activity Item Module [page 7].
8. Choose *Add Selected* to add the custom fields to the activity item.
9. On the Add New Activity Item page, choose *Add* to add the new activity item.
10. Repeat steps 2–9 for each custom field name you created (as referenced in step 7). Be sure to enter them in the sequence listed.

    When you display the details of each "Other" type activity item, its custom field displays at the bottom of the page.



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