

SAP Fieldglass

PUBLIC
SAP Fieldglass

Services Administration

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1 Services Administration Overview

This guide describes the company configurations and admin menu objects that system administrators define when using statements of work and contracts.

A statement of work is a formal document that captures and defines the work activities, deliverables, and timelines that a vendor must execute in performance of specified work. A statement of work differs from a contingent job posting in that it supports tracking and billing of items outside of just a worker such as product deliverables, costs for equipment, budgets, and timelines. It may have one or many people doing work, or the statement of work may not include workers.

In general, statements of work allow you to manage all the characteristics that are part of a project, not just the workers. Payment terms can include worker time and expense, but invoices can also be generated for items such as schedules, events, and fees.

There are services and statement of work company configurations that must be enabled to use statements of work. There are additional configurations in other sections of the company configuration page that also pertain to statements of work.

The administration object Contract Type allows buyers to control many of the aspects of contracts and the statement of works that are created from the contracts. The contract is created and revised through integrations and can perform the functionality of a master statement of work. Statements of work can be created from contracts.

Related Information

Company Configuration: Services [page 4]
Services Administration [page 17]
Company Configuration: Contracts [page 12]

2 Company Configuration: Services

Services company configuration sets system options, information, default settings, and system behavior that govern a statement of work (SOW).

[CM] This indicates this is a self service configuration for buyers who are using Configuration Manager.

Company Configuration	Definition
Enable onsite time tracking with exception workflow	Buyers can define onsite time for each resource. When time keepers submit resource time sheets, the system compares the submitted hours with the onsite time: • **If hours match**: Approval workflow is skipped • **If hours differ**: An exception is triggered, requiring a reason and routing the document for approval **Note** The *Enable onsite time tracking with exception workflow* is now moved as a flag under time template. The only company configuration required for Resource Time sheet module is *Enable Time Processing*.
Fee pricing [CM]	This option is used with the Rate Support on Fees feature. Rate Support on Fees accommodates price variances for statement of work fees based on different attributes. A custom lookup is used to determine the fee based on the attributes entered when adding the fee on a statement of work. When this option is used, an *Explore Pricing Options* link displays on the fee that allows users to view all valid fee attribute combinations and select from a list.
Statement of Work	The company is using Statement of Work functionality. A statement of work provides buyers and/or suppliers alternate methods of defining payment schedules for invoicing. A statement of work (SOW) provides buyers and/or suppliers alternate methods of defining payment schedules for invoicing.
Supplier must enter Usage % on rates for SOW workers [CM]	Suppliers are required to provide the percentage of worker time billed to each rate category. When the supplier is adding an SOW worker, they must enter the *Usage %* for each rate category. The Usage % is the percent of total hours worked in a given week billed to each rate. The Usage % column must total 100%. The estimated amount is included in the estimated and committed spend. For example, if the buyer has ST and OT rate categories on the statement of work and the supplier configures the worker to use 90% ST and 10% OT, the application calculates 90% of the number of hours at the ST rate and 10% of the number of hours at the OT rate. To use this feature, the *Allow Invoicing from Approved Time Sheets* rule must be enabled on the statement of work, and at least one rate must be selected to calculate committed spend.

Company Configuration	Definition
Auto close statement of work when end date exceeds (# of days) [CM]	The statement of work is closed when an end date is reached, and the specified number of days has passed. The statement of work is automatically closed at midnight for their time zone. The number of days can be between 0 and 365. If the value is 0 or blank, the statement of work is automatically closed at midnight on the end date. You can work on any existing line item in Created, Pending, or Invoice Pending Approval status as existing line items are not impacted by the end date. **Note** If *Unused spend is allocated back to the project* configuration is enabled and the *Allow Further Invoicing* flag is set to *No*, then unused funds committed to a statement of work are transferred back into the available funds remaining for the project.
Invoicing can continue after the statement of work is auto-closed [CM]	Allows buyers to send invoices for services provided even after the statement of work has been automatically closed. This closure happens when the end date has passed a certain number of days. This sub-configuration does not restrict buyers from working on existing line items in the statement of work that are in the Created, Pending, or Invoice Pending Approval status. These line items are not affected by the statement of work end date.
Suppress supplier's view of SOW worker comments [CM]	Comments entered by buyer users are suppressed for suppliers when viewing rejected SOW workers. Note that if Comments are enabled to display in final rejection notifications, suppliers will be able to see them.
Edit statement of work without a revision [CM]	An *Edit Statement of Work* option is available in the Actions menu that allows users to make limited changes on a statement of work without requiring approval. The ability to edit a statement of work without a revision is tied to the user role permission *Statement of WorkOthersEdit Statement of Work*. Users must have this user role permission enabled in order to see the action. An SOW revision is automatically generated but it is not routed through the approval process. The following fields can be changed: Buyer Reference, Owner, Business Unit, Site/Location, Cost Center, Primary Cost Center, Cost Center Allocation, Task Code, General Ledger Account Code, Management Events, Schedules, and Events. Enable the *Prevent change to SOW end date* sub-configuration if the SOW End Date should not be changed while editing a statement of work. An SOW revision will be required to change the end date.

Company Configuration	Definition
Buyer and supplier can change SOW worker dates without a revision [CM]	Buyers and suppliers can either manually change the worker end dates, or allow them to automatically sync with the SOW end date during SOW revisions. When this option is enabled, SOW types and templates include the *Can edit Worker start date* rule, and either buyers or suppliers can be selected to change worker start dates. For worker end dates, when this option is enabled, the SOW template Rules section includes two rules, *Can shorten worker end date* and *Can extend worker end date*. The SOW template creator can specify whether buyers/and or suppliers are able to shorten or extend worker end dates. Multiple SOW worker end dates can be changed simultaneously on the statement of work SOW Workers tab. When the buyer or supplier changes the end date of a worker using this functionality, no revision is created and the change does not go through the approval process. Enable the *Recalculate committed spend when SOW worker dates are edited* sub-configuration if the committed spend on an SOW worker should be recalculated when there is a change to the end date of an SOW worker.
Approver can change the cost centers and task codes on schedules, fees, and events [CM]	Schedules, events, and fees can be charged to a different cost center and task code than the cost center on the statement of work during approval. One of the following sub-configurations must be selected: • *Approver can specify a single cost center and task code* • *Approver can add and edit allocation for multiple cost centers* • *Approver can add and edit allocation for multiple cost centers and task codes*
Auto activate SOW workers [CM]	Auto activation of SOW workers is available to be configured on the SOW Type, SOW template, and statement of work. When auto-activate is on and a supplier adds an SOW worker, the worker is automatically activated after any approvals are complete.
Child SOW can be created from a master SOW before approval [CM]	The master statement of work does not require approval or final acceptance by the supplier before a child statement of work can be created.
Use rate grid for SOW workers [CM]	The rate grid structure is available for SOW workers. If this option is enabled, the statement of work creator selects a role and site when defining the SOW workers and the rate category/UOM is pulled from the rate grid. Additionally, the SOW Type/Template rule, *Can Supplier change the Rate from Rate Grids*, displays with the options, *No*, *Can Reduce*, *Can Reduce/Increase*.
Statement of work maximum budget determines signature authority [CM]	When an SOW revision is created that changes the budget amount, the SOW revision routes for approval based on the entire SOW budget, not just the portion that was added in the revision. An Approval Chaining approval group for SOW Revision is required to use this option. This configuration cannot be enabled if the *SOW top up amount determines the approval group for revisions* company configuration option is enabled.

Company Configuration	Definition

Changes to statement of work cost centers are inherited by [CM]	Select the option(s) that will inherit changes to the statement of work cost center(s).
	• SOW workers - Cost center changes are updated on both the work order and the worker record. If the SOW Owner is changed and then a new cost center is added to the SOW, the new SOW Owner defaults as the cost center supervisor for the worker.
	• SOW line items in Created status - Cost center changes are updated on line items in Created status only.
	• SOW line items in Pending Approval, Approved, Rejected, and Approval Paused statuses - Cost center changes are updated on line items with these statuses for all previous revisions of the SOW. Invoiced line items are not updated. This option overrides the following configurations:
	  • Buyer can change line item cost allocation
	  • Allow Approver to manage Cost Centers and Task Codes on SOW Characteristic

Cap on maximum units for scheduled recurring fees [CM]	A validation ensures that the number of units on a scheduled recurring fee does not exceed the value entered in the *Cap on Maximum Units* field. The total number of units is calculated using the total number of line items that are generated based on the Frequency and Period of the recurring fee. The *Cap on Maximum Units* is visible to the supplier when responding to the recurring fee. If the *Can Supplier change the amount prior to invoicing the Schedule* rule is enabled for the statement of work, the supplier may edit the number of units. If the new value causes the cumulative number of units to exceed the cap, the line item cannot be submitted. Line items in Pending Approval, Approved, and Invoiced statuses are considered in the calculation to determine if the cap has been exceeded. During an SOW revision, the Cap on Maximum Units for each recurring fee can be increased or decreased. The *Total Utilized Units* shows the total number of utilized units across all line items in Pending Approval, Approved, and Invoiced status. If editing the cap, the value must be greater than or equal to the total of utilized units plus the total number of units for created and rejected line items.
SOW top up amount determines the approval group for revisions [CM]	Approvals for SOW revisions are based on the changed amount for the max budget, not on the entire statement of work max budget. This configuration applies to SOW revision approval groups when the approval type is Amount Based or Approval Chaining. When an SOW revision changes the budget amount, it routes for approval based on the difference between the previous approved max budget amount and the revised max budget amount. This option cannot be enabled if the *Use Statement of Work Maximum Budget Amount to determine the Signature Authority* company configuration option is enabled.
Supplier can view statements of work and revisions in Pending Approval status [CM]	Suppliers are allowed to view statements of work and SOW revisions in Pending Approval status before buyer approval. The *Allow supplier to view Statement of Work and Statement of Work Revisions in Pending Approval* flag is available on the supplier's record and must also be enabled for the applicable supplier companies. Enable the *Supplier can view the Lifecycle tab* to allow supplier to view the Approvals / Audit Trail tab on a statement of work. The Approvals / Audit Trail tab gives insight as to where the item is in the approval process and who approves next.

Company Configuration	Definition
Suppliers manage cost allocation when marking line items complete [CM]	Suppliers and resources are allowed to manage cost center allocation while marking line items as complete. Suppliers can manage cost centers while completing events, responding to schedules, or submitting a fee response. Resources who are assigned to line items can manage cost centers while marking line items as complete. To use this option, the *Single line item per statement of work invoice* configuration must also be enabled.
Suppliers can submit revisions on invoiced SOW line items [CM]	Suppliers can submit revisions on invoiced events, fees, and schedules. In addition, if the *Allow SOW Worker to Submit Line Items* flag is enabled on an SOW worker, the SOW worker is permitted to revise SOW line items. When an event, fee response/payment, or schedule has a status of Invoiced, a Revise option is available in the Actions menu for suppliers and for SOW Workers who are able to submit line items. A reason is required to submit an SOW line item revision. When an event, fee response/payment, or schedule has been revised, a reversed line item and a revised line item will be created. If the statement of work is copied or renewed, only the original line items are copied. reversed and revised line items are not copied. Once enabled, this configuration cannot be changed.
Single line item per statement of work invoice	Requires suppliers to submit separate invoices for each SOW line item. When this configuration is enabled, the *Allow Supplier to edit Site on Line Items* template rule is available to allow the supplier to specify the site on the invoice line item.
Buyers can edit unconfirmed SOW work orders [CM]	The *Edit Work Order* option displays on the Actions menu and can be used to edit most fields on an SOW work order at any time prior to the work order being confirmed. Non-editable fields include: First Name, Last Name, Email, Role/Site, Rates, Security ID, Security Information, and Custom Fields. When enabling this option, also consider enabling the *Prevent Propagation of Owner/Site and Location From SOW to Existing Work Order* company configuration.
Changes to statement of work owner, site, and location are not inherited by SOW workers [CM]	If the owner, site, or location of a statement of work are changed during an edit or revision, the updated values are not changed on existing work orders or worker records. The update only affects new workers added after the edit or revision.
SOW owner name updates on existing line items	When the name of the SOW owner is updated during revision or edit, that name is automatically updated on existing SOW line items.
Recall statements of work in Pending Supplier Review status [CM]	When a statement of work is in Pending Supplier Review status and there are no clauses on the statement of work, buyers with permission can use the *Recall SOW* option on the Actions menu. Recalling a statement of work allows the buyer to process edits before the statement of work is submitted for supplier acceptance. All mandatory custom fields, both buyer and supplier, must be completed or an error message displays and the recall is not processed.

Company Configuration	Definition
Copy statement of work [CM]	Allows buyers to create a new statement of work by copying an existing statement of work using the *Copy Statement of Work* option on the Actions menu. Copied statements of work contain all the information from the existing statement of work including all active workers and line items. The duplicate statement of work only requires its own start date and can also be edited, as needed. Enable the *Copied/renewed SOW workers do not require approval* sub-configuration to allow approval to be skipped for copied SOW workers. New SOW workers added are still routed for approval. To use this feature, the *Auto-register workers who are moved to a new statement of work without triggering activity items* company configuration must also be enabled. Enable the *Auto activate moved/copied workers* sub-configuration to automatically activate copied workers. The work order is automatically activated and set to a Confirmed status once the statement of work is approved and workers are automatically registered. This configuration also enables the ability to copy an SOW Bid. With this configuration and the *Submit SOW Bid* user role permission enabled, the *Copy SOW Bid* option displays under the Actions menu of the SOW Bid. See Copying Statements of Work for more information.
Renew statement of work [CM]	Buyers can renew a statement of work in one step, which copies and submits all the information from a previous statement of work using the *Renew Statement of Work* option on the Actions menu. Only approved statements of work with no pending SOW revisions can be renewed. Statements of work defined by the supplier only and those created from master SOWs and projects cannot be renewed. Enable the *Copied/renewed SOW workers do not require approval* sub-configuration to allow approval to be skipped for copied SOW workers. New SOW workers added are still routed for approval. To use this feature, the *Auto-register workers who are moved to a new statement of work without triggering activity items* configuration must also be enabled. Enable the *Auto activate moved/copied workers* sub-configuration to automatically activate copied workers. The work order is automatically activated and set to a Confirmed status once the statement of work is approved and workers are automatically registered. See Renewing a Statement of Work for more information.
SOW XML version [CM]	Customers who use the SOW PDF Print feature have provided an XSL template to support using the XML. The SOW XML *Version 1* is in place to support existing companies who have not updated their XSL template to support using the newer *Version 2*. Version 2 should be used for companies who wish to start using the print feature.

Company Configuration	Definition
Auto-register workers who are moved to a new statement of work without triggering activity items [CM]	Buyers may wish to move a worker from one statement of work to another without triggering activity items or requiring the worker to register. When this configuration is enabled, the worker is automatically registered and the new account is linked to the existing worker account. Enable the *Auto activate moved/copied workers* sub-configuration to automatically activate copied workers. The work order is automatically activated and set to a Confirmed status once the statement of work is approved and workers are automatically registered.
SOW Invoice uses Invoice Location to determine tax information [CM]	Only available for companies using Legal Entity. Statement of work invoices use invoice location, instead of site, to determine buyer and MSP supplier invoice tax information. When enabled, *Invoice Location* is an available admin object. The cost centers associated with time sheet, expense sheets, and line items determine the legal entities to be used for these items. The legal entities determine the invoice locations, which in turn determines which invoice tax information that are assigned to the SOW invoice. This feature requires suppliers to associate an invoice location to invoice tax information. When this configuration is enabled, system validations do not allow cost centers that have more than one associated legal entity to be used to determine invoice location.
Buyer can change line item cost allocation [CM]	Allows edits to the cost allocation for individual line items while creating or editing a statement of work or SOW revision, or when an event or schedule is added after the statement of work is created. **Note** If this setting is enabled, the *Add Multiple Fee with SOW Workers* functionality is not visible.
Cost centers can be added or removed [CM]	When **Buyer can change line item cost allocation** is enabled, you have the option to enable this sub-configuration. When this sub-configuration is enabled and **Allow Buyer to edit Line Item Cost Allocation when Buyer adds Line Item to Statement of Work** is enabled on an SOW template, the rule **Add and Remove Cost Centers while editing Line Item Cost Allocation** displays on the template. It allows the addition and removal of cost centers on the SOW line items during creation of statement of work and on approved statements of work. When the rule is enabled on a statement of work and the user edits the cost allocation on the line item during creation, they are able to add a cost center that is not on the statement of work. Once the cost allocation on the line item has been edited in this way, even if cost centers are changed on the statement of work, those cost centers won't propagate to the line item.
Cost bearing [CM]	A *Cost Bearing* flag displays for cost centers when editing the cost allocation on SOW line items. This flag can be used to identify cost centers that have an allocated budget versus those that are informational only. The *Allow Buyer to edit Line Item cost allocation when Buyer adds Line Items to Statement of Work* company configuration must be enabled to enable this configuration.

Company Configuration	Definition
Buyer-defined sequence on line items [CM]	An optional *Sequence Number* field displays for all line items in the characteristics grid. This customized sequence of line items allows list sorting based on specific needs. This also allows buyers who wish to match sequence numbers with other purchasing systems. The *Sequence Number* fields are flexible to meet the specific needs of the buyer company: • Duplicates are allowed. • The value is editable by the buyer in the user interface or in bulk using a connector upload. • The sequence number is copied to recurring line items and itemized events from the parent line item. This configuration is required to use the Service Hierarchy feature. When enabled, the Event Hierarchy admin object is available and allows buyers to use functionality which supports a hierarchical task structure on a statement of work.
Prevent line item approval when [CM]	Select an option for when approval is not allowed for SOW line items. • Maximum budget is exceeded • Maximum budget is exceeded for cost center • Maximum budget is exceeded for cost center and segmented object detail Both pending spend and spend to date are considered.
Suppliers can complete events in bulk [CM]	Suppliers can select multiple events on the Characteristics tab of a statement of work and mark them complete.
Suppliers can withdraw SOW workers [CM]	Suppliers can withdraw SOW workers added during an SOW response while they are in Draft, Pending Approval, or Approval Paused statuses.
SOW workers can act on line items [CM]	Suppliers can use the *Select Actor* action on SOW line items to select SOW workers as line item actors.
Prevent suppliers from viewing the All Suppliers tab in SOW bid chat [CM]	Hides the *All Suppliers* chat tab for all suppliers and buyers on SOW bids to prevent Supplier to Supplier chats. If disabled, any previously hidden chats in the *All Suppliers* tab are visible to both suppliers and buyers.
Resource [CM]	Resource records can be created for use with service orders. They are similar to workforce records, except resource users can register and log in to the SAP Fieldglass application to manage and complete work items and SOW line items. Corresponding Buyer and Supplier fields must be entered on each record to establish a buyer/supplier combination for resources. Enabling or disabling this configuration may impact your system workflows. Contact SAP Fieldglass Product Support if you need further guidance.
Create statement of work for independent consultants	Enables creation of statement of work for independent consultants. Statement of work can be created from Vendor Master records or IC Suppliers.

3 Company Configuration: Contracts

Contracts are created and revised only through integrations. The editing functionality in the SAP Fieldglass user interface is limited, but there are company configurations that must be enabled to use the contracts functionality.

Creating statements of work from contracts simplifies the incorporation of clauses, characteristics, field defaults, event hierarchy, and SOW workers. However, the statements of work created from contracts do not support fees, regular events, and schedules.

Required Setup

The following setup is required to use the contract type for bringing in contracts throught integrations:

Company Configuration

- Contract type requires that *Rates 2.0* must be enabled and is incompatible with rates 1.0. *Rates 1.0 compatible* can be enabled, but does not provide the conditions necessary for contracts.
- Set the *Use legal entity* to *No validation* when there are no legal entities on the contract. Any other selection allows buyers to use legal entities on contracts and statements of work.
- *Statement of Work* must be enabled to use the contract functionality.

If not already enabled, contact SAP Fieldglass to turn on the company configuration.

4 Supplier Setup

Suppliers must be enabled for the Services module in order to be selected on statements of work and SOW bids.

In order for suppliers to be selected on statements of work, the *Services* option must be enabled as a Service Provided on the supplier's details. This flag can be enabled on the supplier invitation or when editing the supplier details for new and/or existing suppliers. Suppliers who are enabled for services must be associated to one or more classifications. Suppliers who will service statements of work with SOW workers must also be associated to SOW worker roles.

Optional setup:

- To allow creation of consolidated invoices for the supplier, select the *Created by Buyer* option for Consolidated Invoice for Services on the supplier's details.
- For MSP enabled companies, select *Indirect Pay* for the Remittance Type (Services) on the supplier's details if the supplier should be paid by the MSP. Direct Pay is the default value. Accept the default if the supplier should be paid by the buyer company.

5 Classifications

Classifications are used to organize SOW templates and the suppliers that provide services.

You can create classifications and assign them to suppliers and SOW types. This allows you to limit the suppliers available for selection on statements of work based on classification. Before a statement of work can be created, a classification must be selected. Only the suppliers and SOW templates that are associated to the selected classification are available when creating the statement of work.

> ⓘ Note
>
> If a buyer wants to filter suppliers by more than classification when creating a statement of work or SOW bid, a Supplier Classification custom lookup can be used.

Classifications are also used with decision forms. When a decision form is created, the classification is optional. If a classification is selected and a a statement of work is created from the decision form, the selected classification will populate on the related document. However, the classification can be changed.

Classifications cannot be removed if they are associated to a supplier or SOW types and templates, or if they have been used on a decision form.

To create a classification, click *New* and enter a *Code*, a *Name* and *Description*, and optionally associate an *SOW Type*. If multiple MSPs are being used, select an *MSP Company*.

Related Information

Custom Lookup - Supplier Classification [page 14]

5.1 Custom Lookup - Supplier Classification

The Supplier Classification custom lookup is used to filter suppliers by more than just classification when creating a statement of work or SOW bid.

The purpose of the Supplier Classification custom lookup is to provide an enhanced filter mechanism that narrows the list of suppliers available for selection on a statement of work. It provides flexibility by allowing custom and user-defined content to be used to assist with supplier selection on statements of work and supplier distribution on SOW bids.

Only one Supplier Classification custom lookup can be created. Once created, it cannot be removed and must be used to select a supplier.

The custom lookup can include *Usage* as a key. This value only applies to SOW bids. The valid values are *Mandatory* and *Optional*. The suppliers defined as Mandatory in the custom lookup table are automatically added to the distribution list for SOW bids and cannot be removed.

> **Note**
>
> After the custom lookup runs on an SOW bid, additional suppliers can be added via the *Add or Remove Supplier* link on the SOW bid

.

Use the information in this table to create the custom lookup.

Field	Description
Name	Enter a name for this custom lookup. This differentiates the lookup from other lookups and displays in drop-down lists when a custom lookup needs to be selected. The name must be unique, it can't include commas, and can be up to 100 characters.
Lookup Type	Choose the type of custom lookup you want to create. The options available depend on how your company is configured. Select *Supplier Classification*.
Data Set	This optional field only displays when the company configuration, Data set, is enabled. The data set must be created before it can be selected from this dropdown. When a data set is selected, the data combinations for the lookup come from the data set. For more information about data sets, refer to the topic.
Number of Segments	The number of attributes required for the lookup. This number corresponds to the number of headers that can be defined. If a data set is associated, this number defaults and can't be changed.
Delimiter	The character used in the upload file to separate the values in each column. Available delimiters: • ; (semicolon) • | (pipe) • - (dash) • : (colon)
#	The number of the segment and the order in which it displays on the custom lookup. The first segment is the first column on the custom lookup. Values must be uploaded in this order.
Header Type	Select either *Key* or *Value*. • *Keys* are the data elements that drive the lookup. These data elements correspond to information on a document or record in SAP Fieldglass, or to the associated documents or records. This data can be system generated or ad-hoc user-entered data. • *Values* are the retrievable results or outputs of the lookup. The values are typically derived from the relationship of the keys. These outputs are always provided by the lookup when it's being used. The Keys must be the first segments and the Values are the last segments.
Type	Select the data element for each Key and Value segment of the lookup. The options available depend on the Lookup Type and your company's setup. This column is available when custom fields and user-defined fields can be used as keys in the lookup.

Field	Description
Key	The available Keys for this custom lookup are: • Classification Code (must be included in the custom lookup): A three or four-digit number assigned to a specific type of work. • Custom: A script configured for the buyer company. • Custom Field: An additional details custom field for decision forms or SOW bids. • General: Free form text. Any value can be entered and will be part of a drop-down list. The user-selected key also appears in the Details tab of the statement of work . • MSP Company (for multiple MSP buyers): The MSP supplier code. • Source Pick List: The pick list being used as the origin for the selectable items. • User Entered: Alphanumeric, numeric, or text field entered by the user. This field provides miscellaneous information that is to be included in the statement of work.
Value	The available Values for this custom lookup are: • General: Free form text. • Supplier Code (must be included in the custom lookup): The code of the 3rd party supplier • Supplier Custom Field: The supplier-only custom field. • Usage (Valid values are Mandatory or Optional and only applies to SOW bids.)
Additional Details	This field is available when the Header Type is *Key* and the Type is a module-specific Custom Field. Select the custom field you want to include in the lookup.
Lookup Headers	When a custom lookup is used on a document or record and requires key selections to retrieve one or more values, the Lookup Headers are the labels for the fields that display for selection. When the Key is a system field such as Site or Supplier, the Lookup Header is auto-populated with the system field label. When the Key is a custom field or a user-defined field, a value must be entered.

6 Services Administration

The Services area of the Admin menu allows you to define the necessary elements to create and manage statements of work for your company.

Services projects use statements of work to define the guidelines, scope, timelines, and deliverables for the work required to complete a project. Contractors use the statement of work as a guide to ensure the project is completed successfully.

In the Services administrative area, you can define the structure for the types of services that your company requires. Some information, such as SOW types and templates, is required to use statements of work. Additional admin objects are optional and can be set up to support your workflow.

> → Remember
>
> As with other areas of SAP Fieldglass, user role permissions must also be defined for Services related administration and tasks.

Related Information

Supplier Setup [page 13]
Classifications [page 14]
SOW Worker Role [page 19]
Label Set [page 24]
SOW Types [page 21]
SOW Templates [page 25]
SOW Rules [page 37]
Clause Library [page 64]
SOW Characteristics Libraries [page 65]
Event Hierarchy [page 66]

6.1 Contract Type

To upload contracts using the connectors, Contract Types admin objects must be created in the user interface.

To create or edit contract types, access the Administration Menu, and under Services, select *Contract Type*. In the Contract Type List, select *New* or choose a contract type to edit.

Contract Type Field Definitions

Details

Field	Definition
Type	A unique name for the contract type.
Description	An optional description of the contract type.

Rules Configuration

The *Hide on Contract (User interface only)*, when selected, will not show the option on a contract based on this type.

Field	Definition
Define Clauses & Characteristics	
Use Clauses	If *Yes* is selected, clauses are optional. If *No* is selected, no clauses are to be used. (The default is *No*.)
Use Events with Lookup	If *Yes* is selected, events are optional. If *No* is selected, no events are to be used. (The default is *No*.)
Use SOW Workers with Lookups	If *Yes* is selected, SOW workers with lookups are optional. If *No* is selected, no SOW workers with lookups are to be used. (The default is *No*.)
Contract Rules	
Suppress Budget Amount from Suppliers	If *Yes* is selected, the suppliers cannot access the budget. If *No* is selected, the suppliers can access the budget. (The default is *No*.)

Form Page Configuration

The *Hide on Contract (User interface only)*, when selected, will not show the option on a contract based on this type. When *Default Contract Value on SOW* is enabled, the defined default value on the contract is selected for this field on the statement of work. The *Lock Contract Value on SOW*, when enabled, does not allow this field to be edited.

Field	Definition
Details	
Name	The name for the contract (read-only).
Description (optional)	An optional value can be entered that will default on the contract.
Start Date	The date the contract commences (read-only).
End Date	The date the contract concludes (read-only).
Buyer Reference (optional)	An optional value can be entered that will default on the contract.
Legal Entity	Displays the legal entity when it is validated by the company (read-only).

Field	Definition
Purchase Unit	Displays the purchase unit when the legal entity is validated by the company and the Purchase Unit configuration is enabled (read-only).
Site	The site from the contract (read-only).
Location	The location from the contract (read-only).
Business Unit	The business unit from the contract (read-only).
Accounting	
Maximum Budget	The upper limit amount for the budget (read-only).
Rules	
Enforce Date Duration of Contract on Statements of Work	Available options: • *Do not enforce* (Default) • *Enforce on Start Date only* • *Enforce on End Date only* • *Enforce on Start and End Dates*
Enforce Maximum Budget of Contract on Statements of Work in SAP Fieldglass	If *Yes* is selected, the contracts budget governs the budgets on statements of work. If *No* is selected, the budget on the contract is not set as the limit. (The default is *No*.)

Custom Fields

Contract custom fields can be added to this contract type. The custom fields can be set as *Mandatory*, *Read Only*, and be provided with a default value.

By default, all contract custom fields with *Affects All Active Contract Types* enabled will be included.

In a Multiple MSP Company, the custom field must also have enabled *MSP Companies* for *Affects All Active* so that the custom field is automatically added.

6.2 SOW Worker Role

Administrators can create and maintain a list of SOW worker roles for use on statements of work.

SOW worker roles are used for reporting purposes and help ensure the worker's rate is accurate. Workers can only be assigned to roles that are associated with the SOW, and roles can be limited by the supplier selected. One or more SOW worker roles are required on statements of work that use SOW workers. To create a new SOW worker role, click *New* and enter a *Code*, *Name*, and *Description*. Further define the role using the fields listed in the table below.

Field	Definition
Use Fees for Billing	Select *Yes* if this role is being used for crew time tracking.
Equipment	Select *Yes* if this role is being used to track equipment for the statement of work.

Field	Definition
Rate Grid	Optionally select a rate grid to associate to SOW workers who are added to an SOW in this role. If the *Use Rate Grid for SOW Workers on Statement of Work* company configuration option is enabled, the *Rate Grid* field displays. If used on the SOW worker role, the workers' rates are derived from the grid.
Job Code	Optionally select a job code to associate to SOW workers who are added to an SOW in this role. A job code allows you to find users or workers with similar qualifications who are working or have worked at the company. Change the SOW worker role on an SOW worker record also updates the value of this field.
Associate to All Suppliers who Service SOW	Select *Yes* to associate this role to all suppliers who have *Services* selected as a *Services Provided* option on supplier's details.

SOW worker roles can also be linked to job posting templates for the purposes of comparing an SOW worker's rate to the same type of worker who is hired on a job posting. By linking the SOW worker role to a job posting template, the SOW information is included in Visualizer reporting.

SOW Worker Roles for Tracking Equipment

Equipment needed for statements of work can be tracked using SOW worker roles. Equipment can have rate cards, where the cost of using it varies by site, and it can have the equivalent of on and off boarding tasks, such as making sure licenses and permits are up to date.

When an SOW worker role is flagged as equipment, the associated equipment worker records are managed similarly to human worker records. Time sheets can be used to track and bill for the time the equipment was in use. Expense sheets can be used to track mileage, parts, or repairs. Equipment differs from human workers in that it should not be included in headcounts or in worker spend when computing the total against the cap.

When a worker is hired to a role with the equipment flag enabled:

- The worker is auto-registered with the worker ID as the username.
- Security ID and Security Information custom fields are not populated and not required.
- Activity items that apply to SOW workers are generated. Those activity items where the actor is the worker are sent to the supplier.
- Time sheets are completed by the supplier.
- A workforce record is created for the worker that can later be used by the supplier to add the equipment to additional SOWs.
- The equipment workers are listed with the other SOW workers on the *SOW Worker* tab. The *Equipment* column can be used to sort the list of workers by type if needed.
- Amounts incurred on time sheets and expense sheets for equipment will not be counted against the Cap on worker spend.

6.3 SOW Types

Use SOW types to define the settings, rules, and characteristics for individual purchasing categories.

During the creation of an SOW type, first the template settings are configured – these are the settings that default when an SOW template is created using this SOW type. Next, the form page settings are configured – these are the settings that default when a statement of work is created from a template that is associated to this type.

> **Note**
>
> The *Use External Validation with BTP* rule is visible when the ENABLE_BTP_RULE_INTEGRATION feature toggle is enabled. The default value is *No*. When set to *Yes*, the *Use External Validation with BTP* rule is available on all SOW Templates associated with the SOW Type, allowing those templates to use BTP-based external validation when users create statements of work. When set to *No*, associated SOW Templates don't display the rule and the native workflow applies.

Classification Associations

Once an SOW type is created, it must be associated to a classification. Each classification can only be associated to one SOW type. However, an SOW type can be associated to multiple classifications.

SOW Type Field Definitions

Field	Definition
Configure Setup for Template and Form/Document	
Rate Structure	When rates coexistence is enabled, when you create an SOW type, the *Rate Structure* field displays. This dropdown indicates whether the type is for Rates 1.0 or Rates 2.0. You must have separate SOW types for each rate structure.
Type	A unique name for the SOW type.
Description	A description of the SOW type.
SOW Type Label Set	The SOW Type Label Set associated with this SOW type, if using.
Combine Details, Clauses, Characteristics Step?	If *Yes* is selected, the Details, Clauses, and Characteristics items are combined into one step, on one page, when a user creates a statement of work. If *No* is selected, the Details, Clauses, and Characteristics items are separate steps displayed on separate pages.

Field	Definition
Template Configuration	The choices made in this section determine the settings that display and the values that default when an SOW template is created using this SOW type. For a description of the template fields, refer to the SOW Templates and SOW Rules topics. During the creation of an SOW type, each field and rule is considered to determine how it may be used for this type. The *Locked?* and *Hidden?* columns are available for you to indicate whether the field is visible on the template and/or if the value should be locked. When *Locked?* is selected for a field, the field is not editable when an SOW template is created with this SOW type. The field also cannot be edited when a statement of work is created from the template. If a mandatory field is locked, a default value must be selected for the field. For fields where the default value can be selected when creating an SOW template, the default value is determined on the template. If a default value is selected on the SOW type, the default value selected on the SOW template overrides the value selected on the SOW type. When *Hidden?* is selected for a field, the field does not display on the SOW template or on the statement of work. If a mandatory field is hidden, a default value must be selected for the field. For fields where the default value can be selected when creating an SOW template, the default value is determined on the template. If a default value is selected on the SOW type, the default value selected on the SOW template overrides the value selected on the SOW type. If a mandatory field is hidden and a default value is not selected, a user creating an SOW template with this SOW type cannot save the template.

Field	Definition
Form Page Configuration	The choices made in this section determine what a user sees when creating a statement of work using a template created using this SOW type. The fields that display in this section depend on the selections that were made in the *Template Configuration* section unless a field is displayed only on the statement of work form page. If a field is hidden on the SOW template, it is also hidden on the statement of work form page. If a default value was defined in the *Template Configuration* section, that value defaults on the statement of work form page. The *Allow multiple classifications* master SOW template rule permits associations to multiple classifications on an master SOW. *Master SOW* With master SOW, you have the ability to lock down some fields on the master so that they can only be populated from an integration, not in the appication. However, these same fields need to be editable on the child SOWs in the application. When the *Master SOW Template* field is set to *Yes*, there are some updates to this page to support this. There's a column, *Lock Only Master SOW?*. Along with this column, three additional fields display for Master SOW types, *Start Date*, *End Date*, and *Legal Entity*. Although these fields are additional on the SOW type, they're existing fields on the form page when creating a statement of work. For these fields, the Hidden? and Locked? columns aren't available. The *Lock Only Master SOW?* column displays a lock icon. When enabled for a field, the field is locked on the master SOW when creating, editing, or revising the master SOW in the application. If the master SOW is created, edited, or revised from an integration, the fields can be populated. When creating the child SOW, the fields aren't locked in the application or on integrations. The existing column, *Locked?*, locks the fields on both the master and child in the application and via integrations. You can't enable both the *Locked?* and *Lock Only Master SOW?* columns for a field. The fields that can use this column are: Name, Description, Start Date, End Date, Legal Entity, Site, Business Unit, and Maximum Budget.
Hide Header	If this check box is selected for a header, the header name does not display on the statement of work form page.
Site and Business Unit	On statements of work, the Site and Business Unit values are derived from the SOW owner. This behavior should be considered if these fields are locked or hidden on the SOW type.

Contextual Help - Help text can be created for the SOW Type to assist the user with the fields.

Related Information

SOW Templates [page 25]
SOW Rules [page 37]
Classifications [page 14]

6.3.1 Label Set

Allows buyers to customize fields on SOW, resource, and contingent types based on the needs of the buyer or supplier.

The Label Set admin object is located in *Admin Configuration* > *Configuration*. Only users with the Administrative Permission *Label Set* > *Manage* can create label sets. Within a label set, separate customizations can be made for each supported language. Once created, label sets are associated to statement of work, resource, or contingent types, and the customizations are applied to the documents created with those types. Multiple label sets can be created to accommodate industry-specific contract terminology.

Default Label Set

Buyer companies automatically have a default label set that includes a subset of both statement of work and contingent fields. There are two fields that apply to both contingent and statement of work: Resume/CV and Time Sheets. Edits made to these labels are applied to both contingent and statement of work types.

Additional facts about the default label set:

- The classic SOW and contingent types are automatically associated to the default label set and since these types can not be edited, the label set can't be changed. **Note:** The classic type is no longer available to new customers or existing customers who do not have job posting templates that use it.
- Edits can be made in the default label set for each applicable language.
- When edits are made in the default set, buyers see the edits throughout the application not just on job postings created with the default label set. It works the same as it does when fields are edited in custom text. For example, if you change the default label for *Job Seeker* to *Applicant*, *Applicant* replaces *Job Seeker* in the application; therefore, if the buyer user selects the *Contingent Labor* menu, instead of there being a *Job Seeker* item, it's called *Applicant*.
- When edits are made in the default label set, suppliers don't see the edits throughout the application. They only see the edits on job postings created using that label set. For example, if you change the default label for *Job Seeker* to *Applicant*, suppliers don't see *Applicant* in the generic areas of the application. Therefore, if the supplier user selects the *Contingent Labor* menu, they still see *Job Seeker*. When the supplier accesses a job posting for that buyer, the supplier sees *Applicant* instead of *Job Seeker*.

Custom Label Sets

Buyers have the option to create custom label sets. There's no limit to the number that can be created. Custom label sets can be created to accommodate industry-specific terminology. When they're used, the custom labels apply to documents created from templates associated to the label set within the contingent, resource, and services workflows.

Additional facts about custom label sets:

- When adding a new or editing an existing SOW, resource, or contingent type, users can select a custom label set, the default label set, or leave the field blank. When the field is left blank, the default label set is used on the type.
- Edits can be made in a custom label set for each applicable language.
- Buyers and suppliers see the custom labels only on documents that use a contingent, resource, or SOW type associated to the custom label set. The customized labels are visible on the job posting, resource, or statement of work and all documents created from them. For example, if you change the custom label in a label set from *Job Posting* to *Requisition*, *Requisition* replaces *Job Posting* on documents created with this label set applied. The custom label doesn't apply outside of the job posting or the documents created from it.

Creating and Editing Label Sets

To create a new label set, select *Label Set* from the Configuration section of the admin menu. On the Label Set List page, select *New*. On the Label Set Details page, select a label set type (Contingent, Resource, or Statement of Work), enter a name, optionally enter a description, and select *Add*. Once created, the available fields display and are listed for all available languages enabled for your company. Labels can then be customized for each locale as needed by selecting the *Edit* button within each language.

You can edit the name and description of an existing label set by selecting it from the Label Set List page, selecting *Edit*, making the changes, and choosing *Update*.

6.4 SOW Templates

SOW templates are used along with SOW types to standardize the statement of work creation process. At least one SOW template must be defined before statements of work can be created.

SOW templates contain the default values and information that automatically populates when a statement of work is created. You can create different templates for different types of projects. When a user creates a statement of work, a template is selected and much of the information is defaulted. This simplifies the process of creating statements of work and reduces the amount of time it takes to train users on this process.

Once the SOW template is created, it must be associated to classifications. The classifications that are associated to an SOW template determine which suppliers and SOW templates can be selected when the statement of work is created. Since suppliers are also associated to classifications, when the user selects a classification while creating a statement of work, only the suppliers and SOW templates that are also

associated to that classification are available. Classifications that are available to be associated to the template are limited to those associated to the SOW type used to create the SOW template.

You can convert existing Classic SOW templates by using the *Edit Type* button on the SOW template Form page. Choosing the *Edit Type* button opens a modal where you can select one of your company's custom SOW template types. Once you've chosen the new SOW template type, choose the *Update* button to close the Classic SOW template and create an updated version with the new custom template type.

External Validation with BTP

The *Use External Validation with BTP* rule is displayed only when enabled in the associated SOW Type. It is unchecked by default, and *Locked during Creation* flag cannot be modified.

- Checked: External Validation is used for SOW creation forms based on this template.
- Unchecked: The native workflow is used.

The *Use External Validation with BTP on SOW Responses* sub-rule is displayed when both the ENABLE_BTP_RULE_INTEGRATION feature toggle and the parent rule are enabled.

- Checked: Shows the *External Validation* button on SOW Response and Revision Response forms.
- Unchecked: Hides the button and uses the native workflow.

For more information, refer to SOW Rules.

Creating SOW Templates

When creating an SOW template, you select an SOW type. The template inherits the fields and rules that are selected and enabled on the SOW type. The settings on the SOW type determine if the field or rule displays on the SOW template and if it can be changed when creating a template or statement of work. Rules that are enabled on an SOW type may be editable, locked, and/or hidden on the SOW template or statement of work.

To create a new template, click *New* from the SOW Template admin object and select the *Type*. Fields and rules that are populated on the selected SOW type default on the template. Enter or change editable fields as needed. Statement of work fields are described in the following table. For a description of rules, refer to the SOW Rules topic.

Type and Template Field Definitions

The table below describes all fields configured on the type and/or template. Your ability to see a specific field is dependent on your company's configuration and whether the field was hidden on the type.

Field	Definition
UNSPSC Code	If desired, a default UNSPSC code for templates created from the type can be entered. The United Nations Standard Products and Services Code is an open, global electronic coding convention that arranges the entire universe of products and services into categories.
Tax Service Type	This field displays when Tax Guidance is enabled. Choose a value from the list, which is populated from the Tax Service Type pick list. When a line item is created that has a site with the *Tax Guidance* site configuration enabled, the *Tax Service Type* field is available and mandatory. The default Tax Service Type is selected on the template, but the value can be edited all the way to the invoice line item.
Defined By	Indicates whether the *Buyer*, *Supplier*, or *Buyer and Supplier* can define the aspects of a statement of work.
Defined By Locked on Statement of Work	If *Yes* is selected, the value of the *Defined By* field cannot be changed when a statement of work is created from a template with this setting. There are situations where this field is automatically hidden on the SOW type. The situations are: • If the *Defined By* field is locked or hidden; the application automatically sets it to *Yes* and hides it. • If the field, *Combine Details, Clauses, Characteristics Step?*, which only displays on the SOW type, is set to *Yes*; the application automatically sets it to *Yes* and hides it. In these situations, when an SOW template is created, this field displays on the template but can't be changed.
Creation Type	Options are *Integrations* and *UI and Integrations*. These options support fully integrated, partially integrated, and user interface workflows for creating and managing statements of work. When *Integrations* is selected, the statement of work can only be created and acted on via integrations. To use fully integrated workflows, such as the 4R2 Integrated Workflows for Services, this flag must be selected. In situations where the workflow is completed either fully or partially in the user interface, *UI and Integrations* should be selected. To use integrated workflows for statements of work, your company must have all of the required integrations enabled before enabling the *Integration* option for *Creation Type*.
Master SOW Template	If *Yes* is selected, a master SOW template can be created from this type.
Child SOW creation	When *Master SOW Template* is *Yes*, this field displays. Select an option to indicate whether child SOWs should be allowed to be created when the master SOW budget has been exceeded (the user is informed of the remaining budget amount in the Remaining Master SOW Maximum Budget field). • Allow when Child SOW budgets exceed Master SOW budget. • Prevent when Master SOW Maximum Budget is Exceeded. • Prevent when Master SOW Maximum Budget, Maximum Characteristic Budget, or Maximum SOW Worker Budget is exceeded.

Field	Definition
Use to create non-billable Statement of Work	If *Yes* is selected, statements of work can be created where no time or expense sheet invoices are generated. The Maximum Budget on the statement of work is $0 and only Clauses, Management Events, and SOW Workers can be used. When this option is selected for a master SOW, the child statements of work have Schedules and Events set to *Do Not Use* and it is locked. The following examples describe situations where buyers may want to use non-billable statements of work: • The buyer wants to track headcount on a project that is billed outside of SAP Fieldglass. • The buyer is using statement of work to onboard workers to feed into the buyer's security system, but invoicing is not handled in SAP Fieldglass.
Use to create SOW Bid	If *Yes* is selected, the SOW template can be used to create SOW bids. This rule is hidden if either the *Master SOW Template* or *Use to create non-billable Statement of Work* options are enabled. At least one of the following characteristics must be selected: Events, Fees, Schedules, and/or SOW Workers.
Associate all Business Units	If *Yes* is selected, all business units are associated to SOW templates created from this type, and any business units created after the template is created are automatically associated as well. If *No* is selected, business units have to manually be associated to the SOW template after it is created.
MSP Company	This field displays when multiple MSP functionality is used. Based on user settings, this field may be populated or selection may be available.
Adjustment Group	If the *Use Adjustment Group* company configuration is enabled, this field displays on types and templates. On SOW types, the only option is to hide or not hide this field on the template. When an SOW template is created, if this field is not hidden, you can select an adjustment group.
Creator can change Adjustment Group	If the *Use Adjustment Group* company configuration is enabled, this field displays on types and templates. If *Yes* is selected, when the statement of work is created, the adjustment group selected on the SOW template can be changed. You can select *Yes* even if an adjustment group is not selected on the template. This allows you to apply an adjustment group at the time the statement of work is created.
Display Spend Allocation Details	This field does not display if your company uses MSP functionality. It cannot be enabled if the *Master SOW Template* flag or the *Use to create non-billable Statement of Work* flag is enabled. If *Yes* is selected, the *Accounting* section of associated work orders has a *View Spend Allocation Details* link that allows you to access a modal that displays how committed spend is allocated between spend and adjustments. Adjustments are comprised of any values based on SOW Invoice and SOW Credit/Debit adjustments with the *Include in Actual Spend* flag enabled.
Currency	This field only displays on SOW templates, not SOW types. Select the currencies with which a statement of work can be created using this template. To add a currency, click *Add or remove Currencies*. Select the currencies that should be associated with this template and click *Update*.

Field	Definition
Define Clauses & Characteristics	On SOW types and SOW templates, you determine whether clauses, management events, schedules, events, fees, and SOW workers should be used. Select *Mandatory*, *Optional*, or *Do Not Use* for each to indicate whether or not it should be used on statements of work. • *Clauses* typically contain items such as legal terminology or company-wide specifications. • *Management Events* typically include items such as an annual business review or executive sign-off meetings. These type of events do not have spend associated to them. • *Schedules* typically contain items such as a standard monthly payment, a recurring bi-monthly payment, or a weekly status report email reminder. This option is only available for Master SOWs when the *Child SOW creation* flag is set to *Prevent when Master SOW Maximum Budget, Maximum Characteristics Budget, or Maximum SOW Worker Budget is Exceeded*. • *Events* typically include items such as project kick-off, analysis start, analysis end, or training completed. These type of events have spend associated to them. This option is only available for master SOWs when the *Child SOW creation* flag is set to *Prevent when Master SOW Maximum Budget, Maximum Characteristics Budget, or Maximum SOW Worker Budget is Exceeded*. • *Fees* typically include items that are billed on a unit basis, such as laptops repaired, cell phones issued, or pages translated. • *SOW Workers* are typically used when the supplier is going to submit workers to the statement of work. When SOW workers are used, a work order is generated when the supplier's response (that includes SOW workers) is approved. Depending on how the statement of work is defined, the SOW workers may or may not complete time sheets, and invoices may or may not be generated from the time sheets.
Clauses	If clauses are set to Mandatory or Optional on the SOW type, the *Clauses* section displays on the template. Clauses can be copied from the Clause Library to the template.
Custom Fields	Sections display on the template for SOW Custom Fields and for custom fields created for characteristics that are set to Mandatory or Optional on the template. Custom fields are not defined on the type. Statement of work custom fields with the *Affects all Active Templates* flag enabled on the definition automatically display in the SOW Custom Fields section. Characteristics custom fields with the *Add and Lock on all active templates* flag enabled on their definitions automatically display on the template in the appropriate sections. To add additional custom fields, click *Add Custom Fields*.
Rules	Applicable rules are described in the SOW Rules topic.

Related Information

SOW Types [page 21]
SOW Rules [page 37]
Classifications [page 14]
Master Statement of Work [page 30]
SOW Bid [page 33]

6.4.1 Master Statement of Work

Master statements of work allow buyers to engage suppliers in multiple related projects that are governed by the same contract information.

The Master Statement of Work functionality gives the buyer the ability to create a master contract with the supplier. The master SOW includes all the agreed-upon contractual terms that will be in effect throughout each child SOW that is created from the master. Only user in roles with the user role permission, *Statement of Work* > *Create Master Statement of Work* can create a master.

When creating an SOW template, the *Master SOW Template* flag must be enabled to create master SOWs from the template. When this option is enabled, a *Child SOW Creation* setting must also be selected to indicate the behavior of child SOWs in relation to the master SOW budget (the user is informed of the remaining budget amount in the Remaining Master SOW Maximum Budget field).

- Allow when Child SOW budgets exceed Master SOW budget
- Prevent when Master SOW Maximum Budget is Exceeded
- Prevent when Master SOW Maximum Budget, Maximum Characteristic Budget, or Maximum SOW Worker Budget is exceeded

If either *Allow when Child SOW budgets exceed Master SOW budget* or *Prevent when Master SOW Maximum Budget is Exceeded* is selected, only clauses, management events, and fees can be defined when creating the master SOW. Schedules and events are not defined until creating the child SOW.

If *Prevent when Master SOW Maximum Budget, Maximum Characteristics Budget, or Maximum SOW Worker Budget is exceeded* is selected, schedules and events can be defined and a maximum budget can be created for each type of characteristic on the master SOW. The following budget validations occur when this option is selected:

- If schedules, events, or fees are enabled, then a maximum budget is required for each, or the *To be entered by Supplier* option must be selected.
- If the maximum budget for any of the characteristics is entered by the buyer, but the overall budget is set *To be entered by Supplier*, the validation of individual budgets with the overall maximum budget will be skipped.
- Line item budgets for all child SOWs combined cannot exceed the master SOW maximum budget.

> **Note**
>
> The *Use to create non-billable Statement of Work* flag is not available on master SOW templates.
>
> When creating a master statement of work, *Enforce Date Duration of Master Statement of Work when creating Child Statement of Work* sets limitations on child statement of work date durations. The options bracket the start date, end date, or both start and end dates of a child statement of work within the term of the master statement of work.

Values are carried down to the child SOWs depending on the options enabled under the *For Fees and Roles, Child Statements of Work* and *On Child Statements of Work, Fee Rate, and Worker Rates* options.

- For Fees and Roles, Child Statements of Work, the following options are available:
  - Use all defined on Master SOW
  - Use a subset from Master SOW
  - Add new items and use a subset from Master SOW

- On Child Statements of Work, Fee Rate, and Worker Rates, the following options are available:
  - Cannot be added or edited
  - Can be added, but the value cannot be edited
  - Cannot be added, but the value can be edited
  - Can be added and edited

Considerations

The following should be considered when creating master statements of work and child statements of work:

- When creating the master statement of work, the user that is listed in the *Master SOW Owner* is referenced in the system as the *Owner of the MSOW*. Any child statements of work that are created from the master statement of work, and require approval, are routed to the Owner of the MSOW.
- The clauses defined on the master are locked on the child statements of work. Additional clauses can be added.
- Management events and fees defined on the master do not display on the child statements of work. Management events and fees can be defined on the child SOW.
- When creating a child SOW from a master SOW, the *Capitalized* flag defaults from the master.
- When creating a child SOW from a master SOW, the default master data settings (including Primary Business Unit, Default Site, Default Cost Center, and Default Legal Entity) are from the child SOW owner's master data settings.
- When creating a child SOW from a master SOW, the owner can now be updated prior to completing the Create Statement of Work pages for the child SOW.
- When the *Enhanced Legal Entity Validation* company configuration is enabled, the selected SOW Owner determines the selections on the Supplier List and Template List, based on the SOW Owner's default legal entity. Once the supplier and template are selected, the Legal Entity field includes associated choices. The available SOW Coordinator selections are those associated and have access to the legal entity, business unit, site, and cost center. The available business units, sites, and cost centers are also associated with the legal entity.

6.4.2 Enforce Maximum Budget on Master SOW

Master Statements of Work allow buyers to create a master contract with a supplier that includes all agreed upon contractual terms that will be in effect for each child SOW. In many cases, buyers also establish a budget at the MSOW level that should be enforced across all related SOWs.

When the Master SOW Template flag is enabled on an SOW template, the *Enforce Max Budget on Characteristics and SOW Worker* flag is displayed.

When the *Enforce Max Budget on Characteristics and SOW Worker* flag is enabled:

- The buyer is able to create a maximum budget for each type of characteristic on the MSOW.
- The *Can be used to create non-billable Statement of Work* flag is not displayed because the MSOW cannot be used to create a non-billable SOW.
- Schedules and Events are shown in the Define Clauses and Characteristics section of the MSOW template. Schedules and Events are not displayed in the Define Clauses & Characteristics section if *Enforce Max Budget on Characteristics and SOW Worker* is not enabled.

MSOW Template Rules

The following items related to MSOW budget and drawdown apply to the rules on an MSOW template:

- If the *Enforce Max Budget on Characteristics and SOW Worker* flag is enabled, the *Disallow approval of items when Maximum Budget is exceeded* rule is enabled and cannot be changed.
- If the *Suppress Budget Amount from Suppliers* rule is enabled, the individual characteristics budgets and the Worker Max budget, along with the Overall Max budget, is suppressed.
- If Events, Schedules, and/or Fees have been selected for use on the MSOW template, the *Bypass approval on Line Items* rule is displayed.
- If Schedules have been selected for use, the *Can Supplier change the amount prior to invoicing the Schedule* rule is displayed.
- If Events have been selected for use, the *Can Supplier change the amount prior to invoicing the Event as complete* flag is displayed.
- The value selected for *Maximum Budget Entered By* defaults to will be the selected value for the new Schedule, Event, and Fee budgets as well as the SOW Worker budget.

MSOW Creation

When *Enforce Max Budget on Characteristics and SOW Worker* is enabled on the MSOW template, new budget fields may be displayed, depending on the selections made on the MSOW template.

If *Schedule*, *Event*, and/or *Fee* has been marked as *Mandatory* or *Optional* on the MSOW template, and has been subsequently enabled on the MSOW, then a budget amount must be entered for the Characteristic or *To be entered by Supplier* must be selected.

If SOW Worker has been marked as *Mandatory* or *Optional* on the MSOW template, and has been subsequently enabled on the MSOW, then a budget amount must be entered for SOW Workers.

SOW Validations

When an MSOW is created and *Enforce Max Budget on Characteristics and SOW Worker* is enabled on the MSOW template, the following validation rules apply:

- The total of all the MSOW line item budgets plus the MSOW Worker budget cannot exceed the MSOW Max Budget.
- For the fees defined on the MSOW with Max Units greater than zero, the total amount of the fees cannot exceed the Maximum Fee Budget.
- If *Schedule*, *Event* or *Fee* is selected, then a Max Budget must be entered or *To be entered by Supplier* must be selected for each.
- If the Max Budget for any of the Characteristics is entered by the buyer, but the Overall Budget is marked as *To be entered by Supplier*, the validation of individual budgets with the overall Max Budget will be skipped. However, once the supplier has reviewed the MSOW, if the buyer sends the MSOW to the supplier for another review, the validation will happen before the MSOW is sent to the supplier the second time.

Child SOWs

When a child SOW is created from an MSOW for which *Enforce Max Budget on Characteristics and SOW Worker* is enabled, there is no change in functionality or in the user interface.

The following validation rules apply:

- The sum of the Max Budget of this CSOW and all other existing CSOWs must not exceed the Max Budget of the SOW.
- The cumulative Worker Cap on this CSOW and all other existing CSOWs cannot exceed the MSOW Worker budget.
- The cumulative sum of fee amounts for this CSOW and all other existing CSOWs cannot exceed the MSOW Fee budget. Adjustments applied to fees will not be accounted for during this validation.
- The cumulative sum of event amounts for this CSOW and all other existing CSOWs for this MSOW cannot exceed the MSOW Event budget.
- The cumulative sum of schedule amounts for this CSOW and all other existing CSOWs for this MSOW cannot exceed the MSOW Schedule budget.
- The total of all line items on the CSOW should not exceed the CSOW Max budget. However, the total of line items and the Worker Cap can exceed the CSOW budget. In other words, while validating the total amount against the CSOW Max budget, the Worker Cap will not be considered.

For all validations, all Child SOWs, except CSOWs in Draft, Rejected, and Closed status are considered.

6.4.3 SOW Bid

Buyers can get bids for statement of work projects from multiple suppliers using the SOW bid functionality in SAP Fieldglass.

SOW bids outline the scope of the work (similar to a statement of work) and multiple suppliers can review, collaborate within their supplier organizations, and respond to the SOW bid. The SOW bid itself is non-transactional. However, transactional statements of work can be created from the SOW bid to award the work to a supplier.

For customers using Rates 2.0 and statements of work, the functionality in SAP Fieldglass is fully aligned with the Contract Module.

Enable the *Use to Create SOW Bid* template rule on SOW types and SOW templates to make the template available for selection when creating an SOW bid.

SOW Bid Setup

The following optional items can be set up for use with SOW bid.

- Enable the SOW template rule, *Suppress SOW Bid Owner, SOW Bid Creator and Line Item Owner from Supplier* to hide this information from suppliers on SOW bids created from the template. In addition, the buyer's name is suppressed on all notifications concerning the SOW bid that are sent to the supplier.
- Enable the *Statement of Work: Redistribute* user role permission to allow users to redistribute both statements of work and SOW bids to additional suppliers. When a buyer selects *Actions* > *Redistribute* on the Statement of Work Bid screen, the Redistribute Statement of Work modal displays.
- Custom fields for the statement of work module can apply to SOW Bid, statements of work, or both. If needed, create custom fields or edit existing custom fields to apply to SOW bid. The custom fields must also have the *Affects All Active* field enabled for *Suppliers* to display on the SOW bid.
- You can use the Question Library to create a library of commonly used questions for inclusion on SOW bids. When suppliers respond to an SOW bid with questions, the supplier is required to answer all

mandatory questions. When creating the SOW bid, the buyer defines who should evaluate the responses using the *Add or Remove Evaluators* link.

- The *Statement of Work Change SOW Bid Info* user role permission controls who can edit the *SOW Bid Respond By Date* and the *Supplier Chat Respond By Date* fields.

SOW Bid with Contract

You can associate contracts to suppliers during the SOW bid creation, allowing the necessary rates from the contract lookups to be negotiated. The system determines what selected contracts are available by confirming that they each use the same lookup as the Event Hierarchy Lookup, Rates Lookup, and SOW Worker Roles Lookup.

When creating or editing an SOW Bid:

- In the Supplier Selection section, choose *+ Associate Contract* to select the contract to be in effect with the supplier. Only one contract can be associated to an individual supplier.
- When a contact is already associated with a supplier, select *associated contract* to view the selected contract and make changes.

When a contract is associated with an SOW Bid, the following occur:

- The contract pulls in the Event Hierarchy Lookup from the associated contract. This allows the correct set of rates can be negotiated with the supplier.
- The SOW Workers step of the SOW bid form pulls the rates and SOW Worker Roles lookups from the associated contract. This allows the correct set of worker roles and rates can be negotiated with the suppliers.
- The legal entity on the contract matches the legal entity selected on the bid.
- The buyer can associate a contract that has additional legal entities to a bid supplier. The legal entity that is selected on the SOW bid must be one of the valid legal entities listed on the associated contract.
- Both buyers and suppliers can see if an SOW bid is associated to a contract. All related documents can be viewed.
- When responding to a bid, suppliers can view associated contract terms, conditions, expectations, and other pertinent information, to enhance transparency and facilitate informed decision-making.
- When this SOW bid is approved, the new statement of work is automatically associated to the contract.

Event Hierarchy

The Event Hierarchy custom lookup that uses Data Set and User Defined Segments can be selected when creating an SOW bid. The User Defined Segment functionality displays when the *Item Category* is *Item Set* or *Limit*. The following describes the functionality:

Rates

- When a lookup is selected and *Use Lookup* is *Yes*, and you select the *+ Add New Event Hierarchy* link, the rates come from the custom lookup Event Hierarchy admin object when adding a hierarchical event with the Item Category = Standard.
- When a lookup is selected and *Use Lookup* is *No*, and you select the *+ Add New Event Hierarchy* link, you can define rates.
- You can only select one Event Hierarchy rate from the Lookup table.
- When a predefined Lookup is NOT selected from the dropdown during SOW Bid creation, you can select the *+ Add New Event Hierarchy* link and freely create an Event Hierarchy with new information. If needed, you are able to define rates on the last level of the Event Hierarchy.

- You are able to define hierarchical events on an SOW bid without a custom lookup, allowing you the flexibility of distributing necessary rates.

Custom Lookup

- When creating an SOW bid with an Event Hierarchy custom lookup that uses Supplier Code as a key, you can define the parent level of an event hierarchy. This setup allows suppliers to select and enter rate information when responding.
- When defining hierarchical rates on SOW bids, you can edit the rates from the Event Hierarchy custom lookup. This ability depends on the *Rate Change Allowed (Standard only)* custom lookup setting. If this setting isn't configured, the *Allow rates from the Event Hierarchy lookup to be edited when adding a Standard hierarchical event to a Statement of Work or SOW bid* statement of work template rule applies. This setup ensures that buyers and suppliers can negotiate rates as necessary.
- A new Lookup Data tab on the SOW bid displays the associated Event Hierarchy custom lookup data.
- You can now add hierarchical events to an SOW bid when the *Use to create SOW Bid* and *Use Hierarchical Events* rules are enabled on the SOW template. When enabled, the *Event Hierarchy* and *Lookup* dropdowns, and the *+ Add New Event Hierarchy* link are displayed during SOW Bid creation.

For suppliers, when the SOW bid is defined by buyer and supplier, you can edit and / or add new hierarchical events to the bid. A new Lookup Data tab on the SOW bid displays your own associated Event Hierarchy custom lookup data.

SOW Bid Approval Routing

You can create approval groups specifically for the SOW bid module. Approval Rules can also be created for the SOW Bid module that can be included in an SOW bid approval group. This allows you to create an approval group that uses values in SOW Bid data fields to trigger the appropriate approval group. Contact your SAP Fieldglass representative to use this feature.

Because there are no approvals for supplier responses to SOW bids, approval groups for the SOW Response module aren't used for SOW bids.

Thresholds

SOWs created from SOW bids use the same thresholds as non-bid SOWs. However, only certain thresholds apply to SOW bids.

Threshold Type	Functionality for SOW Bid
Alerts	SOW bids don't trigger alerts.
Escalations	Only the Statement of Work thresholds applies to SOW bid.
PMO Dashboard	Only these thresholds apply to SOW bid: • Rejected Statement of Work • Statement of Work awaiting approval • Statement of Work in Draft status • Statement of Work needing an approver
Visualizer	SOW bids are excluded from Visualizer.

Related Information

Question Library [page 36]

Question Library

The Question Library allows you to create and maintain a collection of commonly used questions for use on SOW bids.

The Question Library allows buyer administrators to organize questions into categories within sections so that predefined question sections can be easily used on SOW bids. When questions are included on SOW bids, suppliers answer the questions when responding to an SOW bid. All mandatory questions must be answered to submit an SOW bid response. The answers are used by the buyer to evaluate the suppliers. Using questions on an SOW bid is optional.

> ⓘ Note
>
> You do not need to create Question Library sections to include questions on an SOW bid. During the creation of an SOW bid, ad hoc questions that are not in the Question Library can be added.

Once Question Library sections are created, they can be:

- Associated to SOW bid templates. Then, the questions are included on any SOW bids created from the template but can be removed during the creation of the SOW bid.
- Copied directly to SOW bids.

Question Library Field Definitions

Select *SOW Bid* as the module if there is a choice. Otherwise it defaults to SOW Bid.

Field	Definition
Read Only	If a question section is *Read Only*, buyer users cannot edit the questions in this section when managing the questions on an SOW bid. A *Read Only* question section can be removed from the SOW bid up to the point when it is submitted to suppliers. Once submitted, no changes can be made to the questions.

Field	Definition
Mandatory	If a question section is *Mandatory* and it is included on an SOW bid, the supplier is required to answer the questions in the section when responding to the SOW bid. The mandatory flag does not require the question section be included on an SOW bid. Mandatory question sections can be removed from SOW bids up to the point when it is submitted to the suppliers. Once submitted, no changes can be made to the questions. If a question section is *Mandatory*, but not *Read Only*, buyer users can edit the questions when managing the questions on an SOW bid.
Questions	A question section must contain at least one category but can have multiple categories.
Create Question Category	Click *+Add Category* to open the Question Category modal. A question category may contain multiple questions. • Enter the *Name* of the question category. • Enter a brief *Description* of the question category, if desired • Type the *Question* text. • Select the *Answer Type*. Possible answer types are: *Yes/No*, *Descriptive*, *Yes/No & Descriptive*, *5 Point Rating*, and *Specification*. Suppliers should be expected to answer all questions, except those marked Specification, which are considered to be informational only. To add the question to the question category, select the checkbox next to the question text. Clear the checkbox to remove a question from the question category. Once the answer type is selected, a blank question field displays. Continue adding questions to this category. When the questions are complete, click *Add*. To add another category of questions, click *+Add Category*. When the question library section is complete, click *Add*.

6.5 SOW Rules

SOW types and templates contain rules that define aspects of the statement of work and its workflow.

The following rules can be enabled on SOW types and/or templates for use with statements of work. Several of the rules are also available for use with SOW bids. The availability of some rules is based on a company configuration; therefore you may or may not see some rules depending on your company's configurations. Additionally, if you are creating an SOW template, you may not see some rules that are hidden on the SOW type.

SOW Rules

Rule	Description
Use External Validation with BTP	When this rule is enabled, the *External Validation* button appears on statement of work create and edit forms that use the associated SOW template. You must choose *External Validation* before you submit the form. The button triggers a validation call to SAP Build Process Automation. This rule is only available when the *Use External Validation with BTP* rule in the associated SOW Type is set to *Yes*.
Use External Validation with BTP on SOW Responses	When this sub-rule is enabled, the *External Validation* button appears on SOW Response and SOW Revision Response create and edit forms that use this template. You must choose *External Validation* before you submit the form. The button triggers a validation call to SAP Build Process Automation. This sub-rule is only available when the ENABLE_BTP_RULE_INTEGRATION feature toggle is enabled and the *Use External Validation with BTP* rule in the associated SOW Type is set to *Yes*.
Disallow Approval of Items When • Maximum Budget is Exceeded or • Maximum Budget is Exceeded for Cost Center • Maximum Budget is Exceeded for Cost Center and Segmented Object Detail	When one of these options is enabled on the SOW type or SOW template, approvers can't approve items when the amount would place the statement of work over the maximum budget, the maximum budget for the cost center, or the maximum budget for the cost center and segmented object detail. Both pending spend and spend to date are considered (the user is informed of the remaining budget amount in the Remaining Master SOW Maximum Budget field). If SOW workers are defined in the statement of work and *Track Time Sheets* is enabled for SOW workers, the *Allow Invoicing from approved Time Sheets* flag is available when defining SOW workers. If enabled, time sheets that exceed the maximum budget or cost center budget can't be approved. If the *Display Spend Allocation Details* flag is also enabled, additional validations are used. These validations use the spend and adjustment amounts on the line items, time sheets, and invoices. When the *Child SOW creation* flag is set to *Prevent when Master SOW Maximum Budget, Maximum Characteristics Budget, or Maximum SOW Worker Budget is Exceeded*, this rule is selected and locked.
Allow MSOW Association to SOW Bid Supplier	Buyers can associate master statements of work to suppliers on the SOW bid form page using the *Associate MSOW* link. SOW bid responses and child statements of work inherit the SOW line items and properties of the associated master statement of work

Rule	Description
Auto Respond	The buyer can bypass the traditional supplier acceptance. Once the initial statement of work has been approved the supplier response is automatically generated and the statement of work moves to the next appropriate status, Approved or Response Pending Approval. The buyer can't change the statement of work end date to a date earlier than the end date of any workers submitted on the statement of work. When using this functionality, the supplier doesn't have the opportunity to respond to the changes, so signatures and acceptance must be handled outside of the system. The supplier receives a notification that the SOW response was automatically generated. All mandatory custom fields, both buyer and supplier, must be completed or an error occurs and the SOW response can't be auto-generated.
Skip Collaboration	Allows the buyer to skip the buyer and supplier review steps when submitting statements of work or SOW revisions that are Defined By Supplier or Defined By Buyer and Supplier.
Auto Calculate Maximum Budget	Allows the maximum budget for a statement of work to be automatically calculated based on the total of the SOW line items. The *Maximum Budget* field doesn't display on the *Details* page when creating a statement of work. Instead, the maximum budget is automatically calculated and displays on the *Review* page. During statement of work creation, line items that are added are included in the automatic calculation. On statements of work that are defined by the supplier or both the buyer and supplier, if the supplier can add or edit line items, the line items added or edited during a response are also included in the automatic calculation. Applicable MSP fees are included in the auto-calculated maximum budget. On statements of work that use SOW workers, if there is a cap on the worker spend, it is also included in the auto-calculated maximum budget. Once a statement of work is approved, the automatic calculation stops. Amount-based line items added, edited, or removed during an SOW revision are included in the automatic calculation and impact the maximum budget. Taxes and adjustments can't be factored into the maximum budget amount when this rule is enabled. If adjustments are being used, *Auto Calculate Maximum Budget* shouldn't be enabled on statements of work.
Maximum Budget Entered By defaults to	The option selected for this rule determines whether the buyer or supplier is the default value for this field on statements of work. If *Buyer* is selected, the Maximum Budget field on the statement of work defaults to being entered by the buyer. The buyer user can enter the Maximum Budget or specify that it should be entered by the supplier. If this rule is enabled on a master SOW, the value selected for this rule is the value for schedule, event, and fee budgets, as well as the SOW worker budget.

Rule	Description
Suppress Budget Amount from Suppliers	Prevents the supplier from viewing the statement of work maximum budget. The field displayed on a statement of work created from this type or template and defaults to Yes, but can be changed. When the supplier responds to a statement of work, the *Accounting* section is suppressed. However, if characteristics have been defined by the buyer, the amounts for those characteristics display during the supplier's response, even if the maximum budget is suppressed. If SOW workers are associated with the statement of work, the *Cap on Worker Spend* is also be suppressed. If this rule is enabled on a Master SOW, individual characteristics budgets, the worker budget, and the overall maximum budget are suppressed.
Allow Suppliers to disable the 'Track Time Sheet' flag on SOW Workers	Allows suppliers to disable time sheet tracking for individual workers on a statement of work. *Add Workers Without Time Sheets for any SOW Worker Role* is a sub-rule for the Allow Suppliers to disable 'Track Time Sheet' flag on SOW Worker rule. When this sub-rule is enabled, a supplier can select any role in the buyer company and submit an SOW worker with time sheets disabled. In addition, they can submit an SOW worker against worker roles defined on the statement of work. If the sub-rule isn't enabled, suppliers who want to submit an SOW worker with time sheets disabled will be restricted to only worker roles that have been defined on the statement of work with rates. This sub-rule is disabled by default.
Allow Supplier to Define Payment Currency on a SOW Bid Response	When enabled, this configuration gives suppliers the ability to respond to SOW bids in their preferred currency. The *Payment Currency* selected by the supplier is displayed as the *Bid Response Currency* when viewed by the buyer on the Response tab of the SOW bid. Only currencies that are associated to the site and cost center combination of the SOW bid are made available to the supplier.

Rule	Description
Enable SOW Headcount Cap	This rule allows a headcount cap to be enforced on a statement of work. A required *Headcount Cap* field displays on statements of work created using the template. When the headcount cap is exceeded, a warning message displays. Default headcount cap messages are available in the *Messaging* > *Statement of Work* module. Establishing a headcount cap doesn't prevent suppliers from exceeding the cap. Alert thresholds and conditional approval group variables provide additional controls for buyers to monitor the SOW headcount. When the worker count on a statement of work exceeds the headcount cap, the buyer isn't notified unless alert thresholds and/or conditional approval group variables are established. The *Workflow* > *Thresholds - Alert*, *Active Workers nearing Headcount Cap* threshold can be enabled and set to notify buyers when the number of workers on a statement of work has surpassed a set percentage of the headcount cap. The percentage entered should be the percentage of the headcount cap remaining when you would like to receive the alert. The Headcount Exceeded message in the Statement of Work module must be enabled to notify users when the threshold is exceeded. *Conditional Approval Groups* A conditional approval group variable can be set up to ensure that when the number of SOW workers reaches a certain number, approval is required to add additional workers. The conditional variable level can be included in approval groups in the SOW Worker, SOW Response, and SOW Revision Response modules. To set up the conditional variable for an approval group, edit an existing approval group or create a new approval group and select the *Total of all Workers/WO not in Rejected/Closed/Deleted* status option. Then enter a condition and select *Headcount Cap* as the value. This rule only displays if SOW workers are set to Optional or Mandatory.
Event Due Date is Mandatory	Causes the *Due On* field to become mandatory when adding events to statement of work and SOW revision form pages. This rule is suppressed if the *Use to Create Non-Billable Statement of Work* rule is enabled.
Allow Assistance for SOW Creation	Allows the creator of the statement of work to enter the initial details and then, on the Details step, submit it to be completed by an editor. If the statement of work is submitted to an editor, it must be completed by an editor. To use this workflow, the statement of work approval group must include an editor. This rule is only valid when the *Defined By* option is *Buyer*. If the statement of work is defined by the *Buyer and Supplier* or by the *Supplier*, this rule is disregarded. When the SOW Type has *Combine Details, Clauses, Characteristics Step?* set to *Yes*, this rule is hidden and disregarded. The one-page approach can't be used with this workflow.

Rule	Description
Add Multiple Supplier Tenants	The option to add multiple suppliers allows you to add multiple tenants of the same supplier on a master Statement of Work. This option requires that the rate grid is enabled, *Master SOW Template* field is selected, and *Defined By* is set to *Buyer* or *Buyer and Supplier*. For child SOWs created from a master SOW, the following options are available: • Suppliers are filtered based on classification. • For MSP companies, the additional suppliers must be within the same MSP. • If your company is legal entity enabled, you can also add additional legal entities. The legal entities are limited to those associated to the owner.
Add Multiple Currencies	The option to add multiple currencies requires that the rate grid is enabled, *Master SOW Template* field is selected, and *Defined By* is set to *Buyer* or *Buyer and Supplier*. For child SOWs created from a master SOW, the following options are available: • Can select a subset of Fees and Rates, but can't alter the rate value • Can select a subset of Fees and Rates and alter the rate value • Can select a subset of Fees and Rates, alter the rate value, and add new Fees
Allow Statements of Work to use AI-enhanced description.	Allows buyer users to use Generative Artificial Intelligence to enhance the Statement of Work description to streamline the process and improve cycle times. This feature requires a purchase agreement for use.
Populate statement of work fields using AI	This option allows users with permission to upload digital documents and use the Document Information Extraction (DOX) service to extract information and auto-populate statement of work fields in SAP Fieldglass. DOX uses artificial intelligence (AI) to identify information and populate the appropriate fields. This feature requires a purchase agreement for use.
Use lookup for Worker Roles, Site and Rates	Allows the custom lookups to be used for worker roles, sites, and rates. For child SOWs created from a master SOW, the following options are available: • Can select a subset of Fees and Rates, but can't alter the rate value • Can select a subset of Fees and Rates and alter the rate value • Can select a subset of Fees and Rates, alter the rate value, and add new Fees
Use lookup for Rates	Allows the custom lookups to be used for rates. For child SOWs created from a master SOW, the following options are available: • Can select a subset of Fees and Rates, but can't alter the rate value • Can select a subset of Fees and Rates and alter the rate value • Can select a subset of Fees and Rates, alter the rate value, and add new Fees

Rule	Description
Allow Additional Invoice Adjustment Currency	Permits additional currency selection for invoice adjustments on the SOW response (when *Auto Engage* isn't enabled). The invoice adjustments in the additional currencies are displayed on the invoice PDF. If *Auto Engage* is enabled, the *Additional Invoice Adjustment Currency* field can be selected on an SOW response. Additional currency adjustments display on the statement of work details page, related standard downloads, and in reporting. This rule only displays if more than one currency is enabled for the company.
Discounts can be defined on the SOW	Allows discounts to be defined on statements of work, SOW line items, SOW workers, and SOW worker roles. This rule is suppressed if the *Enable Holdback* rule is enabled.
Allow Rates for SOW Worker Roles without Invoicing	Allows users to define rates for SOW worker roles on statements of work and SOW bids that not have the *Allow Invoicing from Approved Time Sheets* rule enabled.
Determine SOW cost allocation based on Line Item's cost allocation	The application automatically calculates the cost allocation based on the line item's cost allocation. This rule only displays if *Disallow Approval of Items When Maximum Budget is Exceeded for Cost Center and Segmented Object Detail* is enabled. When this rule is enabled, the Cost Allocation page is included when creating a statement of work. This rule doesn't support supplier-defined statements of work, SOW bids, and nonbilliable statements of work. It can only be enabled if: • *Allow Buyer to edit Line Item Cost Allocation when Buyer adds Line Item to Statement of Work* is enabled. • *Edit statement of work without a revision* is disabled.
Suppress SOW Bid Owner, SOW Bid Creator and Line Item Owner from Supplier	This rule hides the SOW Bid Owner, SOW Bid Creator, and Line Item Owner from suppliers on an SOW bid. In addition, the buyer's name is suppressed on all notifications concerning the SOW bid that are sent to the supplier. Once the statement of work is created from the SOW bid, this information is visible to the supplier and the name appears in all notifications. This rule displays when *Use to create SOW Bid* is set to *Yes*.
Flag Remaining Bid Responses for Rejection	Allows SOW bid responses to be marked for rejection after the statement of work has been submitted for approval. Choosing the *Create Bid Response Rejections* button in the Submit Statement of Work modal displays a list of suppliers who have submitted responses to the SOW bid, and gives users the option of flagging them for rejection once the statement of work has been fully approved.
Allow Multiple SOWs from SOW Bid Response	Permits multiple statements of work to be created from a single bid response. This rule displays when *Use to create SOW Bid* is set to *Yes*.
Allow replacement of Cost Centers on Revision	The cost center can be replaced without affecting the cost allocation. This rule only displays if *Determine SOW cost allocation based on Line Item's cost allocation* is enabled. It can't be enabled if the following rules are enabled: • Supplier can create multiple Events from a single Event • Use Hierarchical Events • Enable Holdback
Suppress Supplier Name on Bid Response	This rule hides the name of the supplier from non-administrator users during SOW bid collaboration.

Rule	Description
Enforce Bid Respond By Date	The buyer must enter a Response Due Date on the SOW bid. Suppliers aren't able to respond to the SOW bid if the SOW Bid Respond By Date has passed. This rule displays when *Use to create SOW Bid* is set to *Yes*.
Restrict Response Visibility before Respond By Date for	Buyer users can view and / or reject the SOW responses and the suppliers are able to resubmit, all before the *Respond By Date*. The choices are *All users* and *None*. This rule displays when *Enforce Bid Respond By Date* is set to *None*.
Add and Remove Cost Centers while editing Line Item Cost Allocation	When creating or on an approved statement of work, the rule allows users to add and remove cost centers on the edit cost allocation modal of line items.
Creator Defines SOW Name	When enabled, the *Name* field on the statement of work doesn't default from the SOW template, and requires the SOW creator to enter the name instead.

SOW Revision Rules

Rule	Description
SOW Revision approval required only when Maximum Budget is increased	Only SOW revisions that increase the maximum budget go through the approval process. All other revisions don't require approval.
Suppress SOW Revision	The *Revise* and *Edit Statement of Work* options are removed from the Actions menu on a statement of work.
Allow Supplier to initiate a Statement of Work Revision	Allows suppliers to initiate SOW revisions. A Revise action is available to suppliers on statements of work that have the Defined By option set to Supplier or Buyer and Supplier.

Characteristics Rules

Rule	Description
Bypass approvals on Line Items	Allows line items that are added by suppliers (schedules, events, fees) to be added without requiring approvals. If auto invoicing is enabled, an invoice is generated. If an approval group exists, the invoice requires approval. If the line item is greater than the available budget and the SOW Revision approval required only when Maximum Budget is increased *Disallow approval of items when Maximum Budget is exceeded* rule is enabled, an error occurs when adding the line item.

Rule	Description
Expand recurring Line Items prior to SOW Approval	Any recurring line items display expanded at the time the statement of work is submitted for approval allowing the approver to verify that each occurrence is correct. If this isn't enabled, the recurring line items are collapsed into one line and they can't be expanded.
Allow supplier to specify Site on Line Item	The supplier is able to change the site on a line item to a site other than the site on the statement of work when marking the item as complete.
Allow managing of Management Events, Schedules, Events and Fees after Statement of Work is created	Schedules, events, management events and fees can be added after a statement of work is created and without a revision. This rule can't be changed when creating the statement of work. If you are building a Master SOW template and Management Events is set to *Don't Use*, this rule doesn't display.
Allow management of line items cost allocation when marking items as complete	Suppliers and SOW workers are allowed to manage cost centers while completing events, responding to schedules, or submitting a fee response. This ensures that they can submit a correct cost allocation. When this rule is enabled: • An approval group exists for the line item, the supplier is able to submit the line item with unknown cost center, but the buyer will not be able to approve. • An approval group does not exist for the line item, the supplier is not able to submit the line item with unknown cost center and must change cost centers. When this rule is disabled, and: • An approval group exists for the line item, the supplier is able to submit the line item with unknown cost center, but the buyer will not be able to approve. • An approval group does not exist for the line item, the supplier does not have an option to change the cost center and must contact the buyer for assistance. **Note** When rule *Allow management of line item cost allocation when marking line items as complete* is enabled/disabled and if there is an unknown account category, the suppliers must select the account category and related chargeable cost centers.
Allow Buyer to edit Line Item Cost Allocation when Buyer adds Line Item to Statement of Work	Costs can be allocated across a statement of work's cost centers on individual schedules and events while creating or editing the SOW/SOWR or when an event or schedule is added after the statement of work is created. When this rule is enabled, a supplier can add no more than one fee to a response. Enabling this rule also allows a segmented object detail value to be entered for individual schedules and events. This rule displays if the corresponding company configuration is enabled.

Rule	Description
Auto Invoice all Characteristics, Time Sheets, and Expense Sheets	An invoice is automatically generated when an SOW line item has been submitted and approved. Suppliers don't need to initiate invoices. The supplier is able to add an adjustment to a line item when marking the item complete. To auto-invoice time sheets and expense sheets, the *Allow invoicing from approved Time Sheets* and *Allow invoicing from approved Expense Sheets* flags must be enabled on the statement of work. If you are trying to enforce one line item per SOW invoice, the *Single line item per statement of work invoice* company configuration should be enabled, in case the supplier elects to turn off auto invoicing. This rule can be disabled at the following levels: • Statement of work level • Individual worker level • Event/schedule level (when marking an item complete) • Fee level (when submitting) This rule doesn't display when the *Use to create non-billable Statement of Work* flag is enabled. When this rule is set to *Yes* and the *Allow invoicing from approved time sheets* and *Allow invoicing from approved expense sheets* flags are set to *No* on a statement of work, the remit-to address is not required when adding an SOW worker.
Fees must be copied from library	Fees that are added to the statement of work must be copied from the Fee Library they can't be added adhoc to the statement of work.
Allow use of Fees with SOW Workers	Controls whether the statement of work supports crew work. Fees and SOW workers can be added to the statement of work and the buyer can specify a set of roles for the crew. This allows the time worked by multiple crew members to be submitted and approved together.
Allow Supplier to select Approver for Events, Fee Responses and Schedules	The supplier is required to select an Approver when submitting an event, fee response, or schedule. Approvers can be selected from a list of buyer users who have permission to approve line items plus visibility to the business unit, cost centers, and site of the line item. In order for this rule to route the response to the proper approver, you must also enable the appropriate actors in the Schedule Approval, Event Approval, and/or Fee Approval Group.

Rule	Description
Allow editing of Post PO segments on an SOD during completion of Line Item	Suppliers can edit the Post PO segments when marking events and schedules complete or when submitting a fee response. If the existing rule, **Allow Supplier to Manage Line Item Cost Allocation when marking Line Items as Complete**, is also enabled, the supplier is able to edit both the cost center segments and the post PO segments. The two rules are independent of each other. Allow Supplier to Manage Line Item Cost Allocation when markingThis rule only displays when the company configurations, **Segmented object detail** > **Services cost centers** and **Segmented object detail based allocation is required** are enabled. This rule also applies to workers if the rule, **Allow Worker to Submit Line Items** is enabled.
Allow Supplier to Manage Line Item Cost Allocation when marking Line Items as Complete	Suppliers are allowed to add cost centers while completing events, responding to schedules, or submitting a fee response.
Prevent Supplier from responding to Schedules prior to the Due Date	The supplier isn't able to mark the schedule complete before the due date has arrived.
Can Supplier change the Amount prior to invoicing the Schedule?	Select *No*, *Can Reduce*, or *Can Reduce/Increase* to indicate whether the supplier can reduce and/or increase the amount of a schedule line item before an invoice is generated but after the line item has been approved. When *Auto Calculate Max Budget* is enabled for the statement of work, the *Can Reduce/Increase* option is automatically disabled. If the supplier changes the amount when marking items complete and there is an approval group for the Schedule module, the item goes through the approval process.
Can Supplier change the amount when marking the Event as complete?	Select *No*, *Can Reduce*, or *Can Reduce/Increase* to indicate whether the supplier can reduce and/or increase the amount of an event line item before an invoice is generated but after the line item has been approved. When *Auto Calculate Max Budget* is enabled for the statement of work, the *Can Reduce/Increase* option is automatically disabled. If the supplier changes the amount when marking items complete and there is an approval group for the Event module, the item goes through the approval process.

Rule	Description
Supplier can create multiple Events from a single Event?	Allows suppliers to itemize an event by submitting multiple child events over several time periods. Suppliers can itemize events when marking them as complete so that multiple tax jurisdictions can be used. This rule is set on the SOW template and can't be changed on statements of work. When event items are available, suppliers can mark them complete or choose events to itemize. If this rule is locked, suppliers are required to itemize all events. When this functionality is enabled, a *Remaining Spend* field displays on the parent event that shows the difference between the amount of the parent event and the total of any child events that have been submitted for the parent event. The following examples illustrate how a supplier could use this functionality to itemize and draw down on events: • An event, "Consulting services," in the amount of $12,000 with a duration of 12 months is provided (this is the parent event). The supplier itemizes the event at $1,000 per month for 12 months (these are the child events). • An event, "Office equipment" in the amount of $50,000 with a duration of 3 months is provided (this is the parent event). The supplier itemizes $4000 in City A, $10,000 in City B, $20,000 in City C, $6000 in City D, and $10,000 in City E, all during different time periods (these are the child events).
Use Hierarchical Events	Supports the Service Hierarchy feature that allows buyers to define events and child events to create an event hierarchy. The company configuration, *Buyer-defined sequence on line items*, must be enabled to for this rule to display. Events default to Optional on the statement of work and the *Don't Use* option is locked and can't be selected.
Allow rates from the Event Hierarchy lookup to be edited when adding a Standard hierarchical Event to a Statement of Work	Available when *Use Hierarchical Events* is enabled. The option selected determines if the rates derived from the Event Hierarchy custom lookup can be edited. The options are: • No (default) • Can Reduce • Can Reduce/Increase Depending on the *Defined By* field on the statement of work, both buyers and suppliers can edit the rate during collaboration. If the Defined By is Buyer, only the buyer is able to edit the rate. If the Defined By is Buyer and Supplier or Supplier, both the buyer and supplier can edit the rate. Once the statement of work is approved, it can no longer be edited. **⚠ Caution** If the Event Hierarchy custom lookup includes the Value *Rate Change Allowed (Standard only)*, the option to edit the rates comes from the lookup and the value in the rule on the template is ignored. If the custom lookup doesn't include the Value, the application uses the template rule to determine if the rates can be edited.

Rule	Description
Enable Holdback	Allows buyers to hold back a percentage amount on SOW line items until the project has been successfully completed. When this functionality is enabled, a *Holdback* field displays on the statement of work where the buyer can enter a hold-back percentage for line items. Holdback fields also display for fees and individual schedules and events. This rule isn't displayed if the *Use to create non-billable Statement of Work* flag is enabled. At least one billable SOW characteristic type must be set to *Optional* or *Mandatory* on the template for this rule to display.
Modify cost allocation of individual fees in a fee response	Allows buyers and suppliers, who are able to modify cost allocation, to allocate cost at the individual fee level on one Fee Response. Otherwise, the same cost allocation is applied to all the fees on a Fee Response. One or both of the following company configurations must be enabled to use this rule: • Suppliers manage cost allocation when marking line items complete • Approver can change the cost centers and task codes on schedules, fees, and events
Set Fee response / revision attachments as mandatory	Attachments are mandatory for the statement of work fee response step. When enabled, this functionality also applies to workers, suppliers, and other resources that can complete line items.

Worker Rules

The following statement of work rules can be enabled for use when the *SOW Workers* Characteristic isn't set to *Do Not Use*.

Rule	Description

Use Rates on SOW Workers	This rule displays for companies using the Rates 2.0 rate structure. It indicates that SOW workers added to a statement of work using this template use rates. When enabled, two additional fields display.
	• *SOW Worker Roles Lookup* - If your company has configured any lookups of this type, you have the option of associating a lookup to this template. It narrows the list of available roles based on information on the statement of work.
	• *Rates Lookup* - You must associate a Rates lookup to the template. The Rates Lookup must meet the following criteria:
	  • Must use *Valid On* as a *Key*
	  • Must not use *Rate Component Group Code* as a *Value*
	  • Must not use *Base Rate Category/UOM* as a *Key*

Rule	Description
Automatically refresh rates for SOW Worker Roles from lookup	When an SOW type or template uses Rates 2.0, buyers can use this rule to control whether rates and rate components automatically refresh from custom lookups during the SOW workflow. When this rule is enabled, if the value of any key on the lookup is changed on the statement of work, the rates for the SOW worker roles automatically refresh from the custom lookup. Users are advised of the change via a warning message prior to proceeding to the review and submit page. When this rule is disabled, the lookups only run when a role combination is first added to the statement or work or the SOW revision.
Use rates based on Effective Date	This rule allows you to retrieve all rate values applicable for the statement of work period (Start Date through End Date) when the Rates lookup is processed. If you edit or revise an existing statement of work after enabling the rule in the SOW template, the new Effective Date feature is applied in the updated statements of work as well. Once this feature is enabled, it can't be disabled. To enable this template rule: • The SOW template rule, *Discounts can be defined on the SOW*, must be set to *No*. • The SOW template rule, *Use Rates on SOW Workers*, must be set to *Yes*. **Note** Enabling this rule automatically sets the *Use Rate Schedule* rule to *No*.
Task Code Custom Lookup	On SOW Types, this field is hidden. If you want to use a custom lookup to reduce the number of codes presented to the user, unhide this field on the SOW type. When this field is unhidden on the type, it displays as an optional dropdown on the SOW Template. The dropdown contains all the Task Code Custom Lookups your company configured.
Expense Code Custom Lookup	On SOW Types, this field is hidden. If you want to use a custom lookup to reduce the number of codes presented to the user, unhide this field on the SOW type. When this field is unhidden on the type, it displays as an optional dropdown on the SOW Template. The dropdown contains all the Expense Code Custom Lookups your company configured.
On Page Validation Custom Lookup	On SOW Types, this field is hidden. If you want to use the Validation custom lookup to check for compliance and trigger warning messages when violations are found, unhide this field on the SOW type. When this field is unhidden on the type, it displays as an optional dropdown on the SOW Template. The dropdown contains all the On Page Validation with Notifications Custom Lookup types configured for your company.
Auto Activate SOW Worker	SOW workers are automatically activated when the supplier's response is approved. You don't need to click *Activate* when an SOW worker is added to the statement of work. This rule displays if the corresponding company configuration is enabled.

Rule	Description
Auto Register SOW Worker	SOW workers are automatically registered when the worker is activated.
Allow supplier to control SOW worker rules and create worker roles	For rate grid-enabled companies, supplier-defined statements of work and SOW bids allow only suppliers to instantly create SOW worker roles directly on the form page and define worker rules and rates. • SOW worker-related rules and fields move to the supplier. • Suppliers can define ad hoc SOW worker roles while responding to SOW or SOW bid. • Suppliers have complete visibility to the buyer-defined rates/rate grids and rate schedules while adding them to the role/site combination. • Buyers aren't able to view SOW Worker Rules until suppliers enable it. Once the supplier defines SOW worker rules, buyers aren't able to modify them.
Require Approvals on SOW Workers added during SOW Response and SOW Revision Response	When a supplier submits a worker during collaboration or as part of their response to a statement of work or SOW revision, the application triggers two approvals: • An approval for the response • An approval for the SOW worker This allows the buyer to approve an SOW worker separately from the SOW Response when the worker is submitted as part of the SOW Response. This rule is set on SOW templates and can't be changed on the statements of work.
Use Rate Schedule	This rule determines whether rate schedules can be used on SOW workers. A rate schedule is associated with the statement of work and then assigned to SOW workers added to the statement of work. Worker rates are derived from the rate schedule. This rule displays on templates that have SOW workers set to Mandatory or Optional. This rule displays if the corresponding company configuration is enabled.
Disallow Supplier edits to Pay Rate (for Rate Schedules with Coefficients)	Suppliers aren't able to edit the pay rate when a rate schedule includes a coefficient. This rule displays when *Use Rate Schedule* is enabled.
Disallow Addition of SOW Workers until SOW is Completely Approved	Allows the buyer to prevent suppliers from adding workers to an SOW until it has been approved.
Enable SAP CATS Time Sheet?	SOW workers can submit time from SAP Cross-Application Time Sheet (CATS) time sheets. This rule displays when *Use Rate Schedule* is enabled and Standard time sheets are used.

Rule	Description
Allow all Cost Centers of the company to be assigned to Workers	Buyers are able to associate all cost centers to the SOW worker from the statement of work's SOW Worker Cost Allocation tab and on the SOW worker or work order Cost Allocation tab. If workers are allowed to manage their cost objects, they are also able to add all cost centers from My Cost Centers. If legal entity is used, the cost center must be associated to the statement of work's legal entity. This rule lets workers submit time against cost centers that aren't on the statement of work. To do so, the worker must be associated to the cost centers. This rule isn't available when the *Changes to statement of work cost centers are inherited by SOW workers* configuration is enabled.
Give Workers access to all Task Codes for the Cost Centers	All task codes for the cost centers associated with a statement of work are automatically available for a worker to use on a time sheet. The task codes don't need to be manually assigned on the work order or the worker. This rule displays when the corresponding company configuration is enabled. When this rule is enabled, the ability for workers to submit time sheets is turned off. To reverse this effect, enable the *Allow Worker to submit Time Sheets* rule.
Track Time Sheets	Indicate whether or not SOW workers should complete time sheets. On SOW Type, this rule only displays on the Form Page Configuration.
Time Sheet Type	When Track Time Sheets is Yes, this field displays. You have the option to lock and/or hide this field. During the creation of the statement of work, the time sheet type options that display depend on the site configuration. On SOW Type, this rule only displays on the Form Page Configuration.
Time Sheet Frequency	Select all the options that should be available when creating a statement of work. Depending on the company configuration, the Time Sheet Frequency can be: • Weekly • Biweekly • Semi-monthly • Monthly • 8 Day Time Sheet On SOW Type, this rule only displays on the Form Page Configuration.
Hours per Day	The number of hours per day that is considered a regular work day. On SOW Type, this rule only displays on the Form Page Configuration.
Hours per Week	The number of hours per week that is considered a regular work week. On SOW Type, this rule only displays on the Form Page Configuration.
Allow Daily Verification	Daily time sheet verification functionality is now supported for SOW workers on all time sheet frequencies for daily time and task entries with supervisor review and approval.

Rule	Description
Allow Per Diem	If the worker is allowed to include a per diem amount on the time sheet. On SOW Type, this rule only displays on the Form Page Configuration.
Allow Worker to submit Time Sheets	When the *Give Workers access to all Task Codes for the Cost Centers* rule is enabled, workers can't submit time sheets unless this rule is also enabled. This rule only displays if the Give Workers access to all Task Codes for the Cost Centers' company configuration option is enabled.
Issue Warning if Hours Per Day are exceeded on Time Sheet	A warning will be issued at the time sheet submission if the number of hours are greater than the number indicated on the statement of work as Hours per Day. If enhanced time sheets are used, the time sheet displays on the *With Warnings* tab.
Allow Time Capture in Hundredths of Hours	SOW workers can enter time in hundredths of hours on time sheets. This rule displays when the corresponding company configuration is enabled.
Allow invoicing from approved Time Sheets	An invoice is automatically created when a time sheet has been approved. The *Auto Invoice all Characteristics, Time Sheets, and Expense Sheets* SOW template rule must also be enabled. When this flag and the *Allow invoicing from approved expense sheets* flag are set to *No* and the *Auto Invoice all Characteristics, Time Sheets and Expense Sheets* rule is set to *Yes*, the remit-to address is not required when adding an SOW Worker.
Give Workers access to all Expense Codes for the Cost Centers	All the expense codes for the cost centers associated with a statement of work are automatically available for a worker to use on an expense sheet. The worker inherits all the expense codes assigned to the worker's cost centers. The expense codes don't need to be manually assigned on the work order or worker. This rule displays when the corresponding company configuration is enabled.
Allow Deductions to be Submitted on Time Sheet	Workers can use the *+Add Deductions* link to add deductions on time sheets. The *Deductions* company configuration must be enabled to have this rule displayed on the SOW template.

Rule	Description
Can Supplier change the Rate from Rate Grids	There are three options: • *No* - The supplier doesn't have the option to change a rate derived from a rate grid. • *Can Reduce* - The supplier has the option to decrease the rate derived from a rate grid. This is the default value. • *Can Reduce/Increase* - The supplier has the option to increase or decrease the rate derived from a rate grid. For this rule to display, the following conditions must be met: • The existing type/template rule, **Allow Supplier to define SOW Worker Roles**, must be set to *Yes*. • The existing type/template rule, **Track Time Sheets**, must be set to *Yes*. • One of the following existing type/template rules, **Allow invoicing from approved Time Sheets** or **Allow rates on SOW Worker roles without invoicing**, must be set to *Yes*. • The SOW template can't be associated to the SOW type, Classic.
Allow invoicing from approved Expense Sheets	An invoice is automatically created when an expense sheet has been approved. The *Auto Invoice all Characteristics, Time Sheets, and Expense Sheets* SOW template rule must also be enabled. When this flag and the *Allow invoicing from approved time sheets* flag are set to *No* and the *Auto Invoice all Characteristics, Time Sheets and Expense Sheets* rule is set to *Yes*, the remit-to address is not required when adding an SOW Worker.
Allow addition of workers during approval	Suppliers are able to add SOW workers on un-confirmed statements of work. The supplier is able to add an SOW worker when the statement of work is in one of the following statuses: • Pending Approval • Pending Response • Pending Supplier Review • Response Rejected • Approval Paused • Response Approval Paused • Pending Buyer Review When workers are added on un-confirmed statements of work, the action is treated as if it was part of the initial response and, therefore, routes through the response approval group, not the SOW worker approval group.
Allow Supplier to Close SOW Worker	A *Close Worker* option appears in the worker Actions menu for supplier users with the appropriate user role permissions.
Supplier must submit Resume/CV	Suppliers are required to attach a resume in the *Resume/CV* field when submitting an SOW worker.

Rule	Description
Allow Supplier to define SOW Worker Roles	Suppliers can select the necessary worker roles during SOW collaboration. This rule displays for companies that use rate grids for SOW workers.
Allow changes to Site and Location on the SOW Work Order/Worker by Buyer	The buyer will be able to edit the site and location on the SOW work order or worker any time after the supplier submits the worker (which creates a work order). The *Edit Work Order* action is available for users who have visibility to the SOW and who have the *SOW Worker/Manage* user role permission. The work order must be in one of the following statuses: • Draft • Created • Pending Approval • Accepted • Activated • Confirmed The action is available on the work order until the worker registers; then the action is available on the worker. If this rule isn't enabled, the work order and worker must have the same site and location as the statement of work. When enabling this rule, buyers should also consider enabling the *Prevent Propagation of Owner/Site and Location from SOW to Existing Work Orders and Workers* company configuration.
Allow changes to Site and Location on the SOW Work Order/Worker by Supplier	The supplier is able to edit the site and location on the SOW work order or worker any time after the supplier submits the worker (which creates a work order). The *Edit Work Order* action is available for users who have visibility to the statement of work and who have the *SOW Worker/Manage* user role permission. The work order must be in one of the following statuses: • Draft • Created • Pending Approval • Accepted • Activated • Confirmed The action is available on the work order until the worker registers; then the action is available on the worker. When enabling this rule, buyers should also consider enabling the *Prevent Propagation of Owner/Site and Location from SOW to Existing Work Orders and Workers* company configuration option.
Allow Selection of Multiple Locations on SOW Workers	Indicates if supplier can add multiple locations. The locations available to be added to the worker on based on the locations from the latest confirmed version of the statement of work.

Rule	Description
Restrict Site selection to sites on the SOW	Sites can't be selected on the SOW Work Order or Worker unless they are within the Site/Rate/Role combinations specified on the statement of work. This rule displays when rate grid is enabled and *Allow changes to Site and Location on the SOW Work Order/Worker* is selected as Buyer, Supplier, or Both.
Can Supplier Submit Absences	For suppliers, a *Create Absence* option is available in the worker's Action menu. Reason codes are required to submit and remove absences. This rule is set on SOW templates and can't be changed on the statements of work.
Can Worker Submit Absences	For workers, a *Create Absence* button is available on the desktop action bar and in the Create menu. Reason codes are required to submit and remove absences. This rule is set on SOW templates and can't be changed on the statements of work.
Buyer can edit Worker start date	Allows buyers to edit worker start dates. This rule is available when the *Buyer and supplier can change SOW worker dates without a revision* company configuration is enabled. The *Edit Worker Dates* user role permission must also be enabled in order to edit a worker's start date. The *Edit Start date* button is available to buyers on the SOW Workers tab.
Supplier can edit Worker start date	Allows suppliers to edit worker start dates. This rule is available when the *Buyer and supplier can change SOW worker dates without a revision* company configuration is enabled. The *Edit Worker Dates* user role permission must also be enabled in order to edit a worker's start date. The *Edit Start date* button is available to suppliers on the SOW Workers tab.
Allow Supplier Review on Time Sheet	Time sheets are directed to the supplier as soon as workers submit them. The supplier can edit or reject time sheets. Time sheets are in Pending Review status during this step. After time sheets are submitted by the supplier, they go through the regular approval process on the buyer side. This option can be changed on the job posting template. Note that anytime sheet edits made by the supplier aren't tracked in the audit trail. Once the configuration is enabled, additional steps are required by SAP Fieldglass to ensure the proper routing of the time sheet. The *Supplier Review of Time Sheet* script needs to be enabled for your company. Contact your SAP Fieldglass representative for assistance. There are no conditions required. All time sheets should route to the supplier for review per the flag on the worker. This rule displays when the corresponding company configuration is enabled.

Rule	Description
Can Shorten Worker End Date by Buyer	The buyer is able to shorten worker end dates. A *Shorten End Date* field displays for buyers on the *SOW Workers* tab on the statement of work. Multiple workers can be updated at the same time. When the *Shorten End Date* field is used, no revision is created and the edit doesn't go through the approval process. This rule only displays when the *Buyer and supplier can change SOW worker dates without a revision* company configuration is enabled. This rule is set on SOW templates and can't be changed on the statements of work.
Can Shorten Worker End Date by Supplier	The supplier is able to shorten worker end dates. A *Shorten End Date* field displays for suppliers on the *SOW Workers* tab on the statement of work. Multiple workers can be updated at the same time. When the *Shorten End Date* field is used, no revision is created and the edit doesn't go through the approval process. Committed spend isn't changed. This rule only displays when the *Buyer and supplier can change SOW worker dates without a revision* company configuration is enabled. This rule is set on SOW templates and can't be changed on the statements of work.
Can Extend Worker End Date by Buyer	The buyer is able to extend worker end dates. An *Extend End Date* field displays for buyers on the *SOW Workers* tab on the statement of work. Multiple workers can be updated at the same time. When the *Extend End Date* field is used, no revision is created and the edit doesn't go through the approval process. You can't extend the end date to a date later than the statement of work end date. This rule only displays when the *Buyer and supplier can change SOW worker dates without a revision* company configuration is enabled. This rule is set on SOW templates and can't be changed on the statements of work.

Rule	Description
Can Extend Worker End Date by Supplier	The supplier is able to extend worker end dates. An *Extend End Date* field displays for suppliers on the *SOW Workers* tab on the statement of work. Multiple workers can be updated at the same time. When the *Extend End Date* field is used, no revision is created and the edit doesn't go through the approval process. This rule only displays when the *Buyer and supplier can change SOW worker dates without a revision* company configuration is enabled. This rule is set on SOW templates and can't be changed on the statements of work.
Worker Owner can be changed on the SOW Work Order/Worker by Buyer	Buyer users are able to change the owner on an SOW work order or worker. The *Edit Work Order* action can be used to change the owner. The work order must be in one of the following statuses: • Draft • Created • Pending Approval • Accepted • Activated • Confirmed The action is available on the work order until the worker registers; then the action is available on the worker. When enabling this rule, buyers should also consider enabling the *Do Not Propagate Owner, Site and Location from SOW to Existing Work Orders and Workers* company configuration.
Worker Owner can be changed on the SOW Work Order/Worker by Supplier	Supplier users are able to change the owner on an SOW work order or worker. The *Edit Work Order* action can be used to change the owner. The work order must be in one of the following statuses: • Draft • Created • Pending Approval • Accepted • Activated • Confirmed The action is available on the work order until the worker registers; then the action is available on the worker. When enabling this rule, buyers should also consider enabling the *Do Not Propagate Owner, Site and Location from SOW to Existing Work Orders and Workers* company configuration.

Rule	Description
SOW Worker Spend estimation based on number of positions and period	This rule allows the number of positions per site/role/Unit of Measure combination and the total number of hours or days required for each position to be entered for an SOW. The SOW worker estimated spend is calculated when a statement of work or SOW bid is being created. The *Number of positions* field and the *Period Worked in Days/Hours/Months* fields display when a statement of work is created. SAP Fieldglass uses the average of the rate amounts, the number of positions, and the period worked to calculate an estimated spend for each role. This calculation allows the buyer to see an estimate of spend for SOW workers while creating the statement of work. This rule is available on SOW types and SOW templates when the value selected for SOW Workers is *Optional* or *Mandatory*. If *Never* is selected for SOW Workers, the rule isn't displayed. This rule is only available when all of the following criteria are met: • The *Use Rate Grid for SOW Workers on Statement of Work* company configuration is enabled. • A non-Classic SOW template Type is being used. • The *Allow invoicing from approved Time Sheets* and *Allow Invoicing from approved Expense Sheets* rules are enabled on the SOW template. When enabled on an SOW bid, the rule applies to SOWs created from the SOW bid, and not to the SOW bid itself. That is, the *Number of positions* and *Period Worked in Days/Hours/Months* fields are displayed on the SOW, but not on the SOW Bid. The rule applies to nonbillable SOWs, since workers on a nonbillable SOW can be allowed to submit time and expenses. The rule isn't present on SOWs created from an SOW bid. The rule is present on SOWs created from a project and on SOWs created from a decision form. If the rule is edited on an existing SOW template, the new value will be applied to new SOWs created after the rule update. It won't affect existing SOWs.
Disallow Supplier to add SOW Worker until SOW is completely Approved.	Prevents suppliers from adding workers to a billable or non-billable statement of work until it has been approved. An informational message is displayed to the supplier when this rule is enabled that clarifies that workers can't be added until the statement of work is approved.

Supplier Fields

Rule	Description
Default Remit-to Address	The *Default Remit-to Address* option on the Statement of Work Response allows suppliers to select the remit-to address already associated to the supplier and apply it as the default for line items. This option can be changed on the SOW Revision and when copying the statement of work. The selected Remit-to Address is displayed when the supplier is completing line items on the statement of work (Example: fees, events, and schedules). The default address also shows on the SOW Worker page and SOW Invoice.

Related Information

SOW Types [page 21]
SOW Templates [page 25]

6.6 SOW Coordinator

The option for SOW Coordinator can be added to SOW types, SOW templates, and assigned to statements of work and statement of work bids. SOW coordinators can alter a statement of work and statement of work bid.

Company Configuration Prerequisites

Buyer administrators must configure the individuals that are candidates for SOW coordinators by confirming that they have the appropriate user role permissions to manage the statement of work or statement of work bid on behalf of the owner. Other permissions include configuring the SOW Coordinator system role for SOW approval groups, activity items, and receipt of messages.

Statement of work company configurations affect the SOW Coordinator role (the SOW owner can continue to administer the SOW, as per configuration), as described in this table:

Configurations that Affect SOW Coordinators	Unique Functionality Relating to SOW Coordinators
Edit statement of work without a revision	The SOW coordinator can change the cost center, business units, and sites on the statement of work without creating a revision. SOW coordinators can also change the end date of a statement of work without affecting the max budget.
Prevent change to SOW end date	The SOW End Date field is displayed in read-only text for the SOW coordinators on the Edit SOW form page.

Configurations that Affect SOW Coordinators	Unique Functionality Relating to SOW Coordinators
Buyer and supplier can change SOW worker dates without a revision	The SOW coordinators can change the worker dates without creating a revision.
Approver can change the cost centers and task codes on schedules, fees, and events	The SOW coordinators with this role permission enabled can select cost center and task codes while approving the SOW line items.
Buyers can edit unconfirmed SOW work orders	Allows the SOW coordinators to change the fields on a work order before full approval.
Recall statements of work in Pending Supplier Review status	Allows the SOW coordinators, with the appropriate permissions, to recall a statement of work from the supplier side, process the edits, and resubmit for approvals.
Buyer can change line item cost allocation	Allows the SOW coordinators to edit cost allocation for individual line items when adding them to the statement of work during statement of work creation, after statement of work creation (if enabled), and during statement of work revision.
Cost centers can be added or removed	Allows the SOW coordinators to add and remove cost centers on the edit cost allocation modal of line items during creation and on an approved statement of work.
Buyer-defined sequence on line items	Allows SOW coordinators to define a sequence for events, schedules, fee definitions, and management events.
Copy statement of work	If the SOW coordinators are defined on the original statement of work, they are copied over to the new statement of work. The list of SOW coordinators can be modified. If the SOW Coordinator field is locked on the SOW Type, then the SOW coordinators cannot be modified.
Renew statement of work	If the SOW coordinators are defined on the original SOW, the users defined as SOW coordinators are copied over to the new SOW. The list of SOW coordinators can be modified. If the SOW Coordinator field is locked on the SOW Type, then the SOW coordinators cannot be modified.
Enhanced Legal Entity Validation	The available SOW Coordinator selections are those associated and have access to the legal entity, business unit, site, and cost center.

Suppliers can see the name of the SOW coordinator, but cannot change it.

SOW Coordinator Setup

Add the SOW coordinator to new statements of work:

1. Edit or create an SOW type (except for classic).
2. On the Form Page Configuration, under Cost Allocation, make *SOW Coordinators* visible.

Existing templates based on the SOW type now have *SOW Coordinator* as an option, however, existing statements of work based on the SOW template do not inherit the option, even if edited. Only new statements of work based on templates have the *SOW Coordinator* option.

If *SOW Coordinators* is visible, but locked, then only the SOW coordinator that is defined in the picklist displays. No one can be added or removed manually.

Once the option is available on SOW templates, there are two methods to add SOW coordinators on statements of work: Create a statement of work or set up a custom lookup.

Improvised

The SOW coordinators can manually be added to a statement of work with these steps:

1. Create a new statement of work from a template that includes the SOW Coordinators section.
2. Fill out the statement of work.
3. In the SOW Coordinators section, select *+Add or Remove SOW Coordinators*.

   The selection of potential SOW coordinators is filtered and shows individuals that have access to the site, business center, user role permissions, etc.
4. Select the desired SOW coordinators.
5. Complete and save the statement of work.

When creating a statement of work, the proper combination of value in the fields automatically populates the SOW Coordinator field. Additional SOW coordinators can be added or removed, but not the SOW coordinator populated by the custom lookup.

If the setting in the SOW type is to hide the SOW coordinator, and the picklist has an SOW coordinator, the SOW coordinator is hidden but still retains all the functionality.

6.6.1 Custom Lookup - SOW Coordinator

The SOW Coordinator custom lookup supports the option to select a user to assist with management of a statement of work.

To provide support to SOW owners, an SOW Coordinator can be assigned to statements of work and SOW Bids.

To use the role of SOW Coordinator, this custom lookup must be configured. Only one lookup of this type can be created. It allows up to 10 segments to support various combinations of fields that may be used to determine who can be selected as the SOW Coordinator.

> **Note**
>
> When implementing the SOW Coordinator in a statement of work, you must use the exact username of the individual being assigned.

Use the information in this table to create the custom lookup:

Field	Description
Name	Enter a name for this custom lookup. This differentiates the lookup from other lookups and displays in drop-down lists when a custom lookup needs to be selected. The name must be unique, it can't include commas, and can be up to 100 characters.
Lookup Type	Choose the type of custom lookup you want to create. The options available depend on how your company is configured. Select *SOW Coordinator*.
Data Set	This optional field only displays when the company configuration, Data set, is enabled. The data set must be created before it can be selected from this dropdown. When a data set is selected, the data combinations for the lookup come from the data set. For more information about data sets, refer to the topic.
Number of Segments	The number of attributes required for the lookup. This number corresponds to the number of headers that can be defined. If a data set is associated, this number defaults and can't be changed.
Delimiter	The character used in the upload file to separate the values in each column. Available delimiters: • ; (semicolon) • | (pipe) • - (dash) • : (colon)
#	The number of the segment and the order in which it displays on the custom lookup. The first segment is the first column on the custom lookup. Values must be uploaded in this order.
Header Type	Select either *Key* or *Value*. • *Keys* are the data elements that drive the lookup. These data elements correspond to information on a document or record in SAP Fieldglass, or to the associated documents or records. This data can be system generated or ad-hoc user-entered data. • *Values* are the retrievable results or outputs of the lookup. The values are typically derived from the relationship of the keys. These outputs are always provided by the lookup when it's being used. The Keys must be the first segments and the Values are the last segments.
Lookup Header	Select the data element for each Key and Value segment of the lookup. The options available depend on the Lookup Type and your company's setup.

Field	Description
Key	Available *Key* options include: • Business Unit Code • Classification Code • Currency • Legal Entity • Location Code • MSP • SOW Type • Site Code • Supplier Code
Value	Available Value options include: • SOW Coordinator

6.7 Clause Library

The Clause Library allows you to manage a collection of commonly used clauses, simplifying the process of creating statements of work.

Clauses outline the contractual language or agreement between the buyer and supplier. They may contain the legal terms for standard regulatory governance policies and conditions. The Clause Library allows administrators to organize clauses into categories within a section so that predefined clause sections can be easily copied to SOW templates and statements of work. Clauses created in the library can be flagged as Read Only, Mandatory, or Restricted. These options are not available when a clause is created ad hoc on a statement of work. Additionally, clauses created ad hoc cannot be reused.

When creating an SOW template, you can copy clauses from the library but you cannot create clauses ad hoc. During the creation of a statement of work, any clauses included on the template will default on the statement of work. Additional clauses can be created ad hoc directly on the statement of work, or they can be copied from the library.

Clause Library Field Definitions

Field	Definition
Section	A unique name for this clause section. The same section name cannot be used for more than one Clause Library admin object. Each library item only has one section.

Field	Definition
Category	A name for this category. The same category name cannot be used for more than one category in this section. The category name can be reused in other Clause Library admin objects. Multiple categories can be included in one section. When the cursor is in the field, additional options display at the bottom, *Move Up*, *Move Down*, *Remove*, and *Add Category*. To add another category in this section, click *Add Category*.
Read Only	If *Yes* is selected, buyers and suppliers can't edit the clauses in that category. This option is usually selected for clauses dictated by a company's legal department.
Mandatory	If *Yes* is selected, when this section is included on an SOW template and the template is used to create a statement of work, the clauses in this category display on the statement of work and cannot be removed.
Restrict the Clause?	If *Yes* is selected, only buyer users with the *Statement of Work* > *Edit Restricted Clause* user role permission are able to edit this clause when it is on a statement of work. Suppliers can't edit a restricted clause. If the Category is read only, this clause can't be edited even if the user has the role permission. This option is separately applied to each clause in the category.
Clause text area	The text area is used to type the clause. When the cursor is in the text area, additional options display at the bottom, *Move Up*, *Move Down*, *Remove*, and *Add Clause*. To add another clause in this category, click *Add Clause*.
+ Add Category	Click to add another category to the clause section.
+ Add Document	One or more documents can be attached to each clause library section. Documents may be used to provide additional information for a clause, or to provide all the verbiage for a clause. If your company has lengthy or complex contracts, you may consider attaching a document that reflects the entire contract, instead of building the contract content within the application.

6.8 SOW Characteristics Libraries

SOW characteristics libraries allow you to predefine events, invoicing schedules, and payment components for statements of work.

SOW characteristics are used to further define a statement of work. Characteristics include events, schedules, fees, and management events. The characteristics that should be used on a statement of work are defined on the SOW type and SOW template. During the creation of the statement of work, the specific characteristics are established. SOW characteristics libraries allow you to create and maintain commonly used characteristics so that they can be copied to the statement of work. Although it is not mandatory that library items are established, it simplifies the process of creating a statement of work because the user does not have to define all aspects of the characteristic each time.

Related Information

Event Library [page 66]
Schedule Library [page 69]
Fee Library [page 70]
Management Event Library [page 73]

6.8.1 Event Library

The Event Library lets you create and maintain a collection of commonly used events for use within statements of work.

Event characteristics can be included on a statement of work when there are items that require payments to be made when certain work products are delivered. When creating a statement of work, events are included either by adding them directly to the statement of work or copying them from the library. Copying them from the library makes the process of creating statements of work simpler. When you add an event directly to a statement of work, the event is not added to the Event Library and cannot be reused.

To create an event, enter a code, name, and description. Then click *Add*. Once created, the event can be copied when adding events to a statement of work.

6.8.2 Event Hierarchy

Used to create hierarchical structures for statement of work events. Users with the Payment Characteristics Manage administrative permission can create and manage the actual billable values that are included on the Event Hierarchy custom lookup.

The event hierarchy is defined manually when creating an SOW in the SAP Fieldglass user application (typically corresponding to an SAP Fieldglass initiated purchase order workflow) or when a SOW is integrated from the purchase order's source system (for example: SAP S/4HANA). SAP Fieldglass incorporates the purchase order hierarchy coming from the source system.

Planning an Event Hierarchy

When planning an Event Hierarchy, the first level is the main event and then each subsequent level are the tasks within the event. The last level is always the billable one. For some examples of how you might plan an Event Hierarchy, refer to .

For information about using AI to assist creating event hierarchies, see AI-Assisted Event Hierarchy Generation.

Related Information

Custom Lookup - Event Hierarchy [page 67]

Custom Lookup - Event Hierarchy

Used in Event Hierarchy to provide billable amounts for the last level of an event hierarchy. The custom lookup can have up to twenty segments and can be used on statements of work to add the appropriate line items for tasks.

Event Hierarchy custom lookups support both the standard Event Hierarchy functionality and integrated workflows functionality such as 4R2 when Standard and Limit line rates come from a contract. The custom lookup is required for the standard functionality to provide billable amounts for the last level of an event hierarchy.

When using integrated workflows such as 4R2, the Event Hierarchy custom lookup can be used for Standard lines and Limit lines that are set to use a lookup. Lines with the item category set to *Limit* without lookup do not require the custom lookup. In addition, lines with the item category set to *Standard* that do not use the lookup because the rate and units are directly defined on the last level of the event.

This type of lookup can have up to twenty segments and can be used on master statements of work and/or statements of work to allow suppliers to add the appropriate line items to complete the necessary tasks. It must include the segments that are used to determine the billable amount for the last level of an event hierarchy. There is no limit to the number of this type of lookup that can be created.

Use the information in this table to create the custom lookup.

Field	Description
Name	Enter a name for this custom lookup. This differentiates the lookup from other lookups and displays in drop-down lists when a custom lookup needs to be selected. The name must be unique, it can't include commas, and can be up to 100 characters.
Lookup Type	Choose the type of custom lookup you want to create. The options available depend on how your company is configured. Select *Event Hierarchy*.
Data Set	This optional field only displays when the company configuration, Data set, is enabled. The data set must be created before it can be selected from this dropdown. When a data set is selected, the data combinations for the lookup come from the data set. For more information about data sets, refer to the topic.
Number of Segments	The number of attributes required for the lookup. This number corresponds to the number of headers that can be defined. If a data set is associated, this number defaults and can't be changed. The maximum number of segments for the Event Hierarchy lookup is 20.
Delimiter	The character used in the upload file to separate the values in each column. Available delimiters: • ; (semicolon) • | (pipe) • - (dash) • : (colon)

Field	Description
#	The number of the segment and the order in which it displays on the custom lookup. The first segment is the first column on the custom lookup. Values must be uploaded in this order.
Header Type	Select either *Key* or *Value*. • *Keys* are the data elements that drive the lookup. These data elements correspond to information on a document or record in SAP Fieldglass, or to the associated documents or records. This data can be system generated or ad-hoc user-entered data. • *Values* are the retrievable results or outputs of the lookup. The values are typically derived from the relationship of the keys. These outputs are always provided by the lookup when it's being used. The Keys must be the first segments and the Values are the last segments.
Type	Select the data element for each Key and Value segment of the lookup. The options available depend on the Lookup Type and your company's setup. This column is available when custom fields and user-defined fields can be used as keys in the lookup.
Key	The available Keys for this custom lookup are: • Business Unit [ALL] • Contract (Services only) • Currency • Custom Field • Event Name • Legal Entity Code [ALL] • Purchase Unit Code [ALL] • Site Code • Supplier Code • User-defined (Only displays when the lookup is associated to a data set; select it when the Key from the data set is not an SAP Fieldglass native or custom field. You need to name the Key in the Lookup Headers column. [ALL] and [N/A] are accepted.) • Valid From • Valid To **Note** When defining the event, for lines marked as 'Standard', the *Valid From* key validates against the start date of the statement of work or statement of work revision. For lines marked as 'Limit', during event itemization/completion, the Valid From key validates against the completed on date. The *Valid To* key validates against the end date of the statement of work or statement of work revision. Using Valid From does not require you to also use the Valid To key; however, using Valid To requires you to use Valid From.

Field	Description
Value	The available Values for this custom lookup are: • Custom Field • Description • Due On • Rate - (zero is an allowed value) • Rate Change Allowed (Standard only) - (acceptable entries are No, Can Reduce, Can Reduce/Increase) • UOM - (When UOM (Unit of Measure) is included as a Type on an Event Hierarchy custom lookup, the UOM entered on the custom lookup must already exist as a Unit Type admin object.)
Additional Details	This field is available when the Header Type is *Key* and the Type is a module-specific Custom Field. Select the custom field you want to include in the lookup.
Lookup Headers	When a custom lookup is used on a document or record and requires key selections to retrieve one or more values, the Lookup Headers are the labels for the fields that display for selection. When the Key is a system field such as Site or Supplier, the Lookup Header is auto-populated with the system field label. When the Key is a custom field or a user-defined field, a value must be entered.

> **Note**
>
> - The Default Operational Contract Structures functionality provides system-delivered default configurations that can be used with Event Hierarchy type custom lookups. These defaults include three segmented pick lists (Default Contract Header, Default Contract Item, and Default Pricing Condition) and a consolidated Default Contract Dataset. Administrators can associate the Default Contract Dataset with an Event Hierarchy type custom lookup to standardize contract header, line-item, and pricing structures and reduce manual setup.
> - User-defined segment fields on an Event Hierarchy custom lookup can be configured to hide from suppliers during SOW event itemization and Resource Time Sheet creation. Configure this using the Hidden on Itemization setting on the Data Set Details page in Dataset Administration. For configuration steps, see Data Set.

6.8.3 Schedule Library

The Schedule Library lets you create and maintain a collection of commonly used schedules for use within statements of work.

Schedule characteristics can be included on a statement of work for items that require payments that will be made to the supplier according to a preset schedule. Examples may include monthly payments, a final payment, or set fees to be paid on specific dates. The supplier can only submit invoices on or after these dates for agreed-upon transactions.

When creating a statement of work, schedules are included either by adding them directly to the statement of work or copying them from the library. Copying them from the library makes the process of creating statements of work simpler. When you add a schedule directly to a statement of work, the schedule is not

added to the Schedule Library and cannot be reused. If a schedule is not copied from the library, all aspects of the schedule must be defined on the statement of work.

Schedule Library Field Definitions

Field	Definition
Schedule Type	If *Regular* (Single) is selected, the schedule occurs once, and a *Due On* date is required on the statement of work. *Regular* is the term used in the Schedule Library. *Single* is the term used on statements of work. If *Recurring* is selected, the schedule recurs on a periodic basis. When adding a schedule directly on a statement of work, there are two additional options. *Single Fee* which, if selected, the schedule occurs once and involves a fee. *Recurring Fee* which, if selected, the schedule recurs on a periodic basis and each occurrence involves a fee.
Frequency	If the *Schedule Type* is *Recurring*, the frequency of the schedule must be selected. The value in this field can be *Daily*, *Weekly*, *Monthly*, *Twice Monthly*, *Quarterly*, or *Yearly*.
Start Period	If the *Schedule Type* is *Recurring* with the frequency Weekly, Monthly or Yearly selected, the Start Period displays. It is used to indicate when the schedule should trigger. For *Weekly*, the day of the week must be selected. For *Monthly* and *Quarterly*, *Start* or *End* must be selected.

6.8.4 Fee Library

The Fee Library offers an option to create and maintain a collection of commonly used fees for use within statements of work.

Fee characteristics can be included on a statement of work when the supplier is going to charge for materials they deliver or use to complete the work. Fees are established for the agreed-upon amounts.

When creating a statement of work, fees are included either by adding them directly to the statement of work or copying them from the library. Copying them from the library makes the process of creating statements of work simpler. When you add a fee directly to a statement of work, the fee is not added to the Fee Library and cannot be reused. If a fee is not copied from the library, all aspects of the fee must be defined on the statement of work.

Fee Library Field Definitions

Field	Definition
Fee Rate Type	Select one option to open the form page. Options are: *Defined on Fees*. The fee value is defined on the fee when copying it to the statement of work. *Defined on Lookup*. The fee value is defined on a custom lookup; the custom lookup must have been created first. *Defined on Fees - Fee with SOW Workers*. When fees are used to define SOW worker rates, use this option to define the rate when copying the fee to the statement of work. *Defined on Lookup - Fee with SOW Workers*. When fees are used to define SOW worker rates, use this option to define the rate from a custom lookup; the custom lookup must have been created first.
MSP Company	The MSP company with which this fee is associated. This field displays when the buyer has multiple MSPs.
Fee Availability on SOW	*Not Available to Suppliers*. The supplier is not able to add this fee when collaborating on a statement of work. *Available to All Suppliers*. All suppliers are able to add this fee when collaborating on a statement of work. *Available for Associated Suppliers*. Only the suppliers that are associated to the fee are able to add the fee when collaborating on a statement of work. Buyers are not able to copy a fee that is not associated to the supplier on the statement of work. To associate suppliers to the fee, click the *Supplier* link under Fee Library in the menu on the left side of the page and associate one or more suppliers.
Use Admin Value	This flag only displays when the Fee Rate Type selected is *Defined on Lookup*. When an SOW revision is created, if this flag is set to *Yes*, the fee on the statement of work picks up the values from the Fee Library admin object. Therefore, all the fields on the fee are reset based on the values from the admin object. If any of the values have changed on the admin object, including rate values on the lookup, the new values are pulled into the SOW revision. Consequently, if there are custom fields that are blank or defaulted on the admin object, those values are applied and may need to be changed. If this flag is set to *No*, the fee on the statement of work picks up the values from the statement of work or the previous SOW revision. It does not look back to the admin object for the values.
Allow Buyer to edit Fee Rate value	This flag only displays when the Fee Rate Type is *Defined on Lookup*. When this flag is set to *Yes*, you can edit the fee rate value when copying the fee to a statement of work.

Field	Definition
Allow Supplier to edit Fee Rate value	This flag displays when the Fee Rate Type is *Defined on Fees*, *Defined on Lookup*, or *Defined on Fees - Fee with SOW Workers*. Options are *No*, *Can Reduce/Increase*, and *Can Reduce*. When this flag is set to *Can Reduce/Increase* or *Can Reduce*, suppliers can change the fee rate value when copying the fee to a statement of work. This rule is disregarded when the statement of work is defined by the buyer.
Enable Effective Fee Period	This field only displays when the fee rate type is *Defined on Fees* or *Defined on Fees - Fee with SOW Workers*. If *Yes* is selected, the *Start Date* and *End Date* fields display which allow the user to establish effective dates for the fee. When the fee is copied to a statement of work, it is only available for selection if its effective dates are within the start and end date of the document. A fee response can only be created for this fee if the fee response effective date matches with the time period specified on the fee dates.
Unit	The unit that applies to this fee. The unit type must have been created in *Admin Configuration* > *Financial Data* > *Unit Type*.
Maximum Units	This flag only displays when the Fee Rate Type is *Defined on Fees*. The maximum number of units to which this fee can be applied. The number of decimal places accepted matches the Decimal Precision setting on the unit type assigned to the fee — either two or three decimal places.
Max Units Mandatory	This flag displays when the Fee Rate Type is *Defined on Fees* or *Defined on Lookup*. When *Yes* is selected, the Maximum Units must be entered when the fee is copied to a statement of work.
Product	This flag displays when the Fee Rate Type is *Can Defined on Fees* or *Defined on Lookup*. Indicates whether this fee applies to a product.
Capitalized	Indicates whether this fee should be capitalized.
Custom Lookup for Fee Library	This flag displays when the Fee Rate Type is *Defined on Lookup* or *Defined on Lookup - Fee with SOW Workers*. Select the Custom Lookup to be used for this fee.

Field	Definition
Custom Fields	Fee module custom fields that have been designated as *Applies to All* or *Mandatory Value* automatically display in the Custom Fields section. If *Defined on Lookup* is selected as the Fee Rate Type, the fee attribute custom fields created for the custom lookup must be included on the fee. Fee attribute custom fields are only available to be added to fees when Defined on Lookup is selected. Additional options for fee custom fields: • Mandatory During Addition to Statement of Work • Mandatory During Completion • Editable After Addition • Read Only Fee attribute custom fields, which apply to Rate Support on Fees, are automatically marked *Mandatory During Addition to Statement of Work and Editable After Addition*. These options cannot be changed.

6.8.5 Management Event Library

The Management Event Library lets you create and maintain a collection of commonly used management events for use within statements of work.

Management event characteristics can be included on a statement of work for deliverables that are required during the course of a project but are not directly tied to a payment. This is because management events do not result in invoices. Examples may include a kick-off meeting, a mid-point review, or a status report. Both buyers and suppliers can initiate management events, and they display as work items on the actor's desktop at the appropriately scheduled times.

When creating a statement of work, management events are included either by adding them directly to the statement of work or copying them from the library. Copying them from the library makes the process of creating statements of work simpler. When you add a management event directly to a statement of work, the management event is not added to the Management Event Library and cannot be reused. If a management event is not copied from the library, all aspects of it must be defined on the statement of work.

Management Event Field Definitions

Field	Definition
Actor User Type	Indicate who is responsible for completing this management event (*Supplier* or *Buyer*).

Field	Definition
Schedule Type	If *Regular* (Single) is selected, the management event occurs once, and a *Due On* date is required on the statement of work. *Regular* is the term used in the Management Event Library. *Single* is the term used on statements of work. If *Recurring* is selected, the management event recurs on a periodic basis.
Frequency	If the *Schedule Type* selected is *Recurring*, the frequency of the management event must be selected. The value in this field can be *Daily*, *Weekly*, *Twice Monthly*, *Monthly*, or *Yearly*.
Start Period	If the Schedule Type is Recurring with the frequency Weekly, Monthly or Yearly selected, the Start Period displays. It is used to indicate when the management event should trigger. For *Weekly*, the day of the week must be selected. For *Monthly* and *Yearly*, Start or End must be selected.

6.9 SOW Review Workflow

The SOW Review Workflow option enables assigned users to make necessary changes to the fields and sections they're responsible for before sending the statement of work or SOW revision to the supplier. Editing the document during the review process is dependent on the user role permissions of View and Manage, as well as the Statement of Work company configuration.

To utilize the SOW Review Workflow, users must have the appropriate permissions and company configuration enabled.

SOW Review Workflow Field Definitions

Field	Definition
Module	The module for the workflow. You can choose either *Statement of Work* or *SOW Revision* for the new workflow.
Name	A unique name for this workflow.
Role Rule	Select *Any* to specify that any user who meets this approver criterion can approve an item, or select *All* to specify that all users who meet this approval criterion must approve an item. Use caution when selecting *All*. If you select *All* and specify a user role that applies to more than one person, everyone with the user role and visibility to the item will have to approve the item.

Field	Definition
Role	There are two types of roles: user roles and system roles. Select the user role or system role with which qualified approvers must be associated. If you select a user role, the role must have the permissions required to perform approvals.
Rule / Variable	This field determines the rule or variable that is used for the approval group level.
Condition	The available conditions for numeric values are *Greater Than* and *Less Than*, while the available conditions for object values are *Equal to* and *Not Equal To*.
Value	Enter a *Value* that determines whether approval is needed. This is often a currency value, but other types of values may also be used (for example, the number of billable hours on a time sheet). The value field will be a text field for any *Greater than* or *Less Than Condition* selection. The Value field will be a dropdown menu for any *Equal To* or *Not Equal* to condition selection. If a custom field is used as a condition, the value field appears as a text box for custom fields of type text or text area. For custom fields of type date, a date box appears.

When this workflow is configured, subsequent approval group reviewers don't see the *Submit* button on the SOW Details page.

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