



SAP Fieldglass 

PUBLIC

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Decision Forms

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1 Decision Form

The decision form feature allows you to capture and review information related to the procurement of services. This information assists you with the creation of job postings, statements of work, SOW bids, profile workers, and projects.

Procurement types can be determined based on the information provided and the related documents can be created and populated directly from decision forms. Decision forms can also be used as a precursor to processes outside of SAP Fieldglass. Decision forms can be configured with an optional procurement type, Other, that allows you to customize a process for requisitions and approvals that are not captured in SAP Fieldglass. Decision form templates contain the informational fields, questions, and requirements needed for decision forms.

Customization of Decision Forms

SAP Fieldglass decision forms are highly customizable, allowing you to capture all of the company specific information needed to make decisions about procuring services. A variety of tools are available for use with decision forms that allow you to customize decision making processes that meet your business requirements. For example:

- Decision form templates can be defined to accommodate one or multiple procurement types.
- Rules can be established on the decision form template that determine when and who can select procurement types for services during the decision making process.
- Custom fields and questions can be added to decision form templates to ensure all necessary information needed to make decisions is collected prior to procuring services.
- Approval groups can be configured to ensure that services are acquired using the appropriate procurement documents.

Company Configurations: Decision Forms

Field Name	Definition
Decision Form	Enabling this configuration allows users to create decision forms. However, it does not require decision forms be used prior to creating related procurement documents. To require users to use decision forms before creating documents, the Lock Default Value setting must be enabled for the desired procurement types. Note that if SOW bid is locked, Statement of Work must also be locked. The procurement options selected determine the documents that can be created from the decision form. Procurement options include the following: • Statement of Work • SOW Bid • Job Posting • Profile Worker • Project
Named resource external verification	This option is used to have the decision form for a named resource verified using an integration with iCon's iConnect for independent contractor evaluations. The iCon integrated solution allows the buyer to verify if a current named resource is an independent contractor or a W-2 worker. When a hiring manager requests a named resource using a decision form, the resource information is automatically punched out to iContract, where fields from the decision form are pre-populated. The hiring manager completes an online evaluation, which will be validated by ICVerify. The decision form remains in a Pending Approval status until the results are provided by iCon. If the worker is an independent contractor, a statement of work can be created. If the worker is a W2 worker, a job posting can be created.
Other	This option can be used to support steps that should occur outside of the decision form workflow. Text can be entered to instruct the user on how to proceed. For example, users may be instructed to verify with the legal, human resources, or purchasing departments that a contingent labor resource is the correct business decision.
Auto close decision form	Use this option if the decision form should be closed once the proposed procurement type is in a submitted status.

1.1 Decision Form Setup

To use the Decision Form feature, the [Decision Form](#) company configuration option must be enabled and the related procurement options must be selected.

The procurement options that you select determine the documents that can be created from the decision form. The following procurement options are available for selection:

- Statement of Work
- SOW Bid
- Job Posting
- Named Job Posting
- Profile Worker
- Project
- Other

Creating Decision Form Templates

To create a decision form template, you should take the following steps:

1. From the [Admin](#) menu, choose [Workflow](#) and then choose [Decision Form Template](#).
2. Choose the [New](#) button.
3. Enter a [Name](#) for the decision form template, as well as a [Description](#) if you feel it is necessary.
4. Enter a value for each of the required fields on the template, such as the applicable procurement options for the template and the rules you want applied to the decision form.
5. Add any custom fields you wish to display on the decision form using the [+Add Custom Fields](#) link near the bottom of the page.
6. Use the [+Add Questions](#) link to choose from a list of predefined questions to add to the decision form.
7. Choose [Add](#) to complete the decision form template.

Decision Form Template Field Definitions

Field	Definition
Details	

Field	Definition
Name	A unique name for the decision form template. This value is required and must be unique. This field supports multiple languages. The translations can be done through the user interface or the translation upload. A user with the appropriate permission, who has a default language that is different than the company default language, is able to enter a translated value when editing a decision form template. Any user who share the same default language as the user who made the change will see the translated Name when creating a decision form.
Description	A description of the template. This field supports multiple languages. The translations can be done through the user interface or the translation upload. A user who has a default language that is different than the company default language is able to enter a translated value when editing a decision form template. Any user who shares the same default language as the user who made the change will see the translated Description when creating a decision form.
Associate all Business Units	If this option is enabled, this template will be associated to all business units. If this option is not enabled, business units can be associated using the left-hand menu.
<i>Procurement Options</i>	
Types	The procurement types for which decision forms created from the template can be used. Depending on the company configuration, options may include <i>Job Posting</i>, <i>Named Job Posting</i>, <i>Statement of Work</i>, <i>SOW Bid</i>, <i>Profile Worker</i>, <i>Project</i> and <i>Other</i>. Multiple options can be selected. Select <i>Other</i> if decision forms created from the template will be used to support processes in addition to creating a statement of work or job posting.
Allow multiple of the procurement type outcome to be created	Enable this option to create multiple instances of the resulting procurement type. The <i>Create</i> (procurement type) button will remain available until the decision form is closed. All documents created from the decision form will display on the Related tab of the decision form.

Field	Definition
Named Resource?	The <i>Named Resource?</i> option is only for use with job postings. If this option is set to <i>Yes</i>, the decision form created from the template must include a named resource. When this option is used on decision forms, at least one approval group must be configured with a first level editor. The editor must select the supplier of the name resource for the job posting. This option should only be used when the buyer has suppliers that allow the buyer to add entries to their workforce. If there are no suppliers that allow workforce entries, the decision cannot be approved.
Wizard	If decision forms created from the template should include a wizard, select the wizard that should be used. Questions from the wizard will be included on decision forms created from the template. This field is displayed on the template when a wizard exists that has the <i>Use On: Decision Form</i> option selected.
<i>Rules</i>	
Use Scoring	This rule allows the user creating or editing the decision form template to determine whether the questions should be scored. If this rule is not enabled, the questions are not scored. When scoring is enabled (<i>No</i> is selected), the score is calculated using the following scale: • Yes/No: Yes=1, No=0 • Descriptive: no scoring • Yes/No & Descriptive: Yes=1, No=0 • 5 Point Rating: 0-5 • User Defined Pick List: user defines a score for each answer. As an alternative to system generated scoring, a User Defined Pick List can be created and a preferred score value can be assigned to each answer.
Display Procurement Types to Requestor	When this rule is selected, procurement options are displayed on the decision form and can be viewed and/or selected by the creator. If this rule is not enabled, and multiple procurement types are available for selection, an approver with editor authority must select the procurement type during the approval process.
Show in Create Menu	When this rule is enabled, the decision form template is displayed as an option on the user's Create menu.

Field	Definition
Require Budget Amount	When this rule is enabled, users are required to enter a budget amount on the decision form before submitting.
<i>Custom Fields</i>	Select <i>Custom Fields</i> to add custom fields to the template. Custom fields must be predefined for the Decision Form module. When the Data Type of a selected custom field is Text or Text Area, users can change the default value of the custom field on a specific decision form template. Each decision form template can have a different default value for the custom field.
<i>Questions</i>	Select <i>Questions</i> to add questions to the template. Questions must be predefined for the Decision Form module.

When creating decision form templates, the options selected on the template impact the workflow and approvals. When the *Allow multiple of the Procurement Type outcome to be created* template rule is enabled, multiple instances of the resulting procurement type can be created.

Decision forms are able to be associated to business units individually, or associated to all at once using the *Associate all Business Units* option on the decision form template. You can edit the decision form template to remove this setting and manually associate the desired business units to the template.

Decision Form User Role Permissions

In addition to creating decision form templates, you can take the following actions to give others visibility to decision forms:

- Enable the *Decision Form* user role permissions for users that should be able to create and manage decision forms.
- Enable the *Recall Decision Form* user role permission for users that should be able to recall decision forms.
- Enable the *Decision Form Template* administrative user role permissions for users that should be allowed to create and manage decision form templates.

Decision Form Reason Codes

Decision form reason codes are required to close decision forms and for approvers to reject decision forms.

Enable Decision Form Recall

A decision form can be recalled when the decision form is in a Submitted, Pending Approval, Approval Paused, or Closed status and a related document has not been created. To recall decision forms, the following setup is required:

- You must have the *Decision Form Recall* user role permission enabled.
- Reason codes must be created for the *Recall* reason code type in the Decision Form module.

1.1.1 Create Decision Form Approval Groups

Approval groups can be created so that buyers can review and edit decision forms as needed.

Decision forms can be approved to allow document creation or initiate a business process outside of the SAP Fieldglass application, such as the *Other* procurement type. Approval group configuration determines the type of actions approvers can perform on decision forms during the approval process.

The following configuration options should be considered when setting up decision form approval groups:

- Editor action – Approvers with editor approval authority can edit and/or complete the decision form prior to approving it.
- Approval action – Approvers with approval authority cannot edit or complete decision forms. Decision forms that require edits must be rejected and edited by the owner and then resubmitted for approval.
- When the *Display Procurement Type to Requestor* rule is not enabled on the decision form template, the user is not able to select the procurement type on the decision form during the creation process. The procurement type must be selected by an editor in order for the decision form to be approved and used to create the related document.
- To use the decision form to create named resource job postings, at least one approval group must be created with the editor level. The editor must edit the decision form to select the supplier. This action cannot be completed when the decision form is created.

When using the *Other* procurement type on decision forms, the approval process should include an editor. An editor is able to edit the decision form when approving it and include instructions for the requestor on next steps. If an approver is added without adding an editor, the decision form can be approved but instructions cannot be added.

1.2 Decision Form Usage

Decision forms must be created from decision form templates.

Users with the appropriate user role permissions can create decision forms and decision form templates by selecting *Decision Form* from the Create menu. You must enter information for the required fields, as well as any optional fields that you feel are necessary.

The Procurement options are only displayed on the decision form if the *Display Procurement Options to Requestor* template rule is enabled. The options available are based on the options selected on the decision form template.

Creating Documents from Decision Forms

Once decision forms are submitted, a button appears on the Decision Form page that is labeled according to the procurement type selected. Select the button to begin the process of creating the related document.

The documents related to a decision form can be created by the original creator of the decision form or the approver. You should configure the Decision Form messages to support your desired workflow.

If [Other](#) is selected as the procurement type, the next steps are outside of the SAP Fieldglass application, and therefore not initiated from the decision form. When [Other](#) is used, the decision form remains in submitted status until it is manually closed.

Rename a Decision Form

The decision form can be renamed to reflect the specific type of process being supported. [Custom Text](#) allows users to display a customized title in the create menu, as well as a custom heading for the decision form. Contextual Help can also be added to help identify how the form should be used.

Delete Draft or Rejected Decision Forms

A decision form can be deleted when it is in a draft or rejected status. The user must have the [Remove Draft/Rejected Decision Form](#) user role permission enabled.

Decision Form Erasure

Decision forms (including decision forms with the Named Resource option enabled) are included as part of Personally Identifiable Information (PII) erasure for customers using the [Data retention policies](#) company configuration enabled. Decision forms, once erased, are moved to the erasure queue. When a decision form is completed with a named resource and is tied to another record (a job posting, statement of work, et cetera), all PII fields and attachments on the decision form are moved to the erasure queue once the last associated record gets erased (based on buyer-defined thresholds).

1.2.1 Decision Form Attachments

When a user creates a document, such as a job posting, statement of work, or project from a decision form that contains an attachment, the attachment behaves as if it had been attached to the document on creation.

The attachment retains its properties, such as person, timestamp, comments, and visibility from the decision form, but the user creating the documents can remove the attachment if desired, change the document's visibility, and add a comment about the attachment.

Attachments that are carried over from a decision form behave as described below:

- SOWs and SOW Bids: Attachments are listed under the Attachments section and under revision 0.
- RFXs: Attachments are listed under the Attachments (RFX) section.
- Named Job Postings: Attachments are attached to the job posting. They are not on the workforce record.
- Profile Worker: Attachments behave in the same way as attachments that are added directly to a new profile worker.
- Project: Attachments behave in the same way as attachments that are added directly to a new project.

1.2.2 Recall Decision Forms

A decision form can be recalled when the decision form has the appropriate status and a related document has not been created.

A decision form can be recalled when the decision form is in a Submitted, Pending Approval, Approval Paused, or Closed status. To recall decision forms, the following setup is required:

- You must have the [Decision Form Recall](#) user role permission enabled.
- Reason codes must be created for the [Recall](#) reason code type in the Decision Form module.

If a user has permission to recall a decision form, a [Recall](#) button is displayed on the form. When the [Recall](#) button is selected, the Recall Decision Form modal is displayed. The user selects the reason for recalling the decision form and will optionally enter a comment.

When a decision form is recalled, the status of the form changes to Draft and a work item is created. In contrast, when the [Complete Later](#) button is selected on a decision form, the form is placed in Draft status but a work item is not created.

If a decision form was Pending Approval when it was recalled, the first approval sequence is automatically rejected. When the user has edited and resubmitted the decision form, the form is re-sent for approval. If a decision form is in Draft or Rejected status, you should select [More Actions](#) and [Remove](#) instead.

1.2.3 Named Resource Decision Forms

When the [Named Resource](#) option is enabled on the decision form template, additional fields appear on the decision form that contain the information for the requested resource. Those fields are populated based on the method used to create the decision form. Options for named resource decision form creation include:

- Create a decision form and select a named resource template.
- From a workforce record, select the [Create Decision Form with Named Resource](#) button from the Actions menu.

When creating a decision form using a named resource template, you must enter the named resource information in the Named Resource section prior to submitting the decision form. The Supplier can be entered if known, but the value entered here does not impact the approval process or related job posting. When reviewing and approving the decision form, the editor must still select a supplier before the decision form can be approved. The only suppliers available for selection in the dropdown are the suppliers that have allowed the buyer to add to their workforce. When the related job posting is created and distributed, a Workforce entry is automatically created for the buyer for the named resource.

When creating a named resource decision form from a workforce record, the only templates available for selection are those with the [Named Resource](#) option enabled. The fields in the Named Resource section of the decision form are automatically populated from the workforce record and the information cannot be changed.

The following should be considered when creating decision forms for named resources:

- If decision forms are used for named resources, the buyer must have at least one supplier that allows the buyer to add entries to the supplier workforce.
- If a decision form is created for a named resource, the resource name cannot be changed after the decision form is approved.

1.3 Decision Form Questions and Workflow Options

Questions can be added to decision form templates to be used on decision forms that prompt users to answer specific questions related to the procurement of services.

Field	Definition
Questions	The question presented to the user. Multiple language support is available for this field. The translations can be done through the user interface or the translation upload. A user with the appropriate permission, who has a default language that is different than the company default language, is able to enter a translated value when editing a question. Any user who shares the same default language as the user who made the change will see the translated value when answering the question.
Description	The entry in this field displays as a tool tip when a user answers the question on a Decision Form. If a question is edited and the description is added or changed, the tool tip is updated on any Decision Forms on which the question is included.
Mandatory	If Yes is selected, the question must be answered. If No is selected, answering the question is optional.

Field	Definition
Answer Type	The type of answer that will be used for the question: • If <i>Yes/No</i> is selected, the answer options will be <i>Yes</i> and <i>No</i>. • If <i>Descriptive</i> is selected, the question requires a descriptive answer. • If <i>Yes/No & Descriptive</i> is selected, the answer should be <i>Yes</i> or and the user should have the option of adding descriptive text to the answer. • If <i>5 Point Rating</i> is selected, the question should be answered with a score between 0 and 5. • Select <i>User Defined Pick List</i> if the answer should be selected from a list of pre-defined answers. Enter each answer that should appear in the list of pre-defined answers. Answers appear in the pick list in the order in which they appear in the Answer list. If scoring is used, a score can be assigned to each answer. The score can be a positive or negative number, but cannot include a decimal. If the field is blank, a zero is assigned as the score. The score can be assigned whether the <i>Exclude from Scoring</i> field is <i>Yes</i> or <i>No</i>. If it is <i>Yes</i>, the score for this question is not included in the total.
Exclude from Scoring	When scoring is enabled and <i>No</i> is selected, the score is calculated using the following scale: • <i>Yes/No</i>: Yes=1, No=0 • <i>Descriptive</i>: no scoring • <i>Yes/No & Descriptive</i>: Yes=1, No=0 • <i>5 Point Rating</i>: 0-5 • <i>User Defined Pick List</i>: user defines a score for each answer. As an alternative to system generated scoring, a User Defined Pick List can be created and a preferred score value can be assigned to each answer.

1.3.1 Procurement Options

This table describes the various procurement workflow options based on the decision form template setup.

Template Options	Decision Form Creation	Decision Form Approval
One Procurement Type	If only one option is selected on the template, that option is automatically selected on the decision form and it cannot be changed during creation.	When submitted for approval the procurement type cannot be edited.
One Procurement Type Named Resource?: Yes	The template procurement type must be Job Posting to create a named resource job posting using the decision form. The creator must enter the resource name before submitting the decision form for approval.	An editor must be defined as the first level approver. The editor must edit the decision form and select the supplier in order to approve the decision form. If an editor is not defined, the supplier cannot be selected and the decision form will be unusable.
Multiple Procurement Types Display Procurement Types to Requestor: Enabled	The decision form creator can select the procurement type on the decision form and submit it for approval. If no procurement type is selected, the decision form can still be submitted for approval.	An editor can edit the decision form and change the procurement type if needed. If an editor is not defined in the approval group and the requestor did not select a procurement type, the approver must reject the decision form and the creator must select the procurement type and resubmit it for approval.
Multiple Procurement Types Display Procurement Types to Requestor: Not Enabled	The decision form creator cannot select the procurement type on the decision form during creation. The decision form is submitted for approval without a procurement type.	An editor must be defined as the first level approver. The editor must edit the decision form and select the procurement type before the decision form can be approved. If an editor is not defined, the procurement type cannot be selected and the decision form is unusable.

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