SAP Fieldglass

PUBLIC
SAP Fieldglass

Worker Management

Content

1 External Workforce Management

Describes the tasks and workflows necessary to create work orders and manage workers from onboarding to offboarding.

SAP Fieldglass external workforce management provides the tools necessary to see and maintain a standardized record of all your global, external workers in one place: contact information, work history, tenure, security ID, certifications, access to company assets, and more.

- Strengthen compliance and reduce risk by gaining visibility into ALL your external workers.
- See all contact information, work history, tenure, certifications, and more in one view.
- More effectively manage headcount, reporting, and audit tasks.
- Fully automate on- and off-boarding tasks.
- Boost security and reduce risk by engaging only eligible, qualified workers.
- Ensure all company assets are retrieved upon completion of the work.

2 Worker Centric View

The *Worker Centric* view option provides a streamlined user interface designed to put the worker at the forefront.

The Worker Centric view is an alternative to the default user interface that is especially helpful to users who are managing workers. This user interface provides a fluid approach to navigating modules and finding important information. It centralizes workers, job postings, and statements of work on the Home page inside three widgets and includes a simplified Home page, a Worker Dashboard, and worker details pages.

Required Setup

The *Worker Centric* option is enabled by default for buyers. You can toggle this option by navigating to the feature switch (located in the top-right corner of the header bar) and selecting the *Worker Centric* option.

The cards you're able to view with the Worker Centric option are contingent upon existing user preferences. The Show My Workers user preference must be enabled to view the My Workers card; the Show My Statements of Work user preference must be enabled to view the My Statements of Work card. In the current view, the Show My Workers user preference also includes job posting information. In the Worker Centric view, the *Show My Job Postings* user preference allows you to choose whether or not to display the My Job Postings card.

Worker Home Page

The Worker-Centric Home page provides a simplified layout that places your workers, job postings, and statements of work in immediate view in a card layout. The information is separated into three cards: My Workers, My Job Postings, and My Statements of Work. Each card uses color-coded categories to group items based on health states, making it easier to prioritize work items that need immediate attention:

- *Red:* Indicates there are critical items associated with a worker, job posting, or statement of work and need immediate attention.
- *Blue* Indicates workers are pending registration.
- *Orange:* Indicates work items associated with a worker, job posting, or statement of work are in a warning state and need attention soon.
- *Green:* Indicates the items associated to a worker, job posting, or statement of work are in a good state and don't require attention at this time.

Customization mode options on each card allow you to turn cards on or off, move cards on the page, or view additional information about a card's functions.

Selecting the *Go to Dashboard* button on the My Workers card displays the Worker Dashboard.

Worker Dashboard

The *Worker Dashboard* provides a summary of all of your assigned workers. It also includes two Advisor charts allowing you to quickly see key performance indicators about worker spend.

The Worker Dashboard was organized into three sections: To Dos, Insights, and My Workers.

The To Dos section contains three cards: My Action Items, Other Action Items, and Alerts. Each card shows the number of critical items, warning items, pending items, and total items that need to be completed, by you (My Action Items), by others (Other Action Items), and alerts (Alerts). Select a card to show the names of the items and associated worker. My Action Items and Other Actions Items are ranked by criticality, and Alerts are grouped by criticality for each worker. For Other Action Items, the responsible team and email icon are also shown. The email icon allows you to send an email to the responsible team. Select an item name link to display more details about that item. If an item is assigned to you, you can mark the item as complete by selecting the *Mark As Complete* button.

In the Insights section of the dashboard, the Actual Spend by Month and Worker Count card shows the actual spend by month and the worker count. The Total Worker Spend for the Month card compares the actual spend to date with the committed spend for the current month of all associated workers.

The My Workers sections provides a summary for each of your assigned workers. Selecting a worker in the My Workers section displays the Worker Details page.

Worker Details Page

The *Overview* tab shows all worker-related activities and items to complete.

The Worker Detiails page includes a Contact Information popover next to the worker name. The Contact Information popover displays the email address, phone number, and physical address of the worker.

The Items to Complete card is divided into three sections: My Action Items, Other Action Items , and Alerts. Each of these sections shows the number of critical items, warning items, pending items, and total items that need to be completed. Select a card to show the names of the items and associated worker. My Action Items and Other Actions Items are ranked by criticality, and Alerts are grouped by criticality for each worker. For Other Action Items, the responsible team and email icon are also shown. The email icon allows you to send an email to the responsible team. Select an item name link to display more details about that item. If an item is assigned to you, you can mark the item as complete by selecting the *Mark As Complete* button.

The additional cards you can view with the Worker Centric option are contingent upon existing user preferences. Contextual help is available providing a high-level description of what each card displays.

When the consolidated worker feature is used, a Summary tab displays a high-level description of the consolidated worker. In addition, current and past worker engagements display as individual tabs using the job title.

3 Workforce Procurement

The SAP Fieldglass application allows you to manage several different types of workers.

The process of hiring workers for temporary and contract assignments allows you to keep track of your external workforce in one place. There are several types of workers you may include in the application. This topic discusses the process of procuring temporary and SOW workers. For both of these types, a work order is created when the person is hired.

- Temporary Workers - These workers are hired through the contingent workflow from job postings.
- SOW Workers - These workers are hired through the services workflow from a statement of work.
- Profile Workers - These workers aren't tied to a job posting or statement of work. Refer to, , for more information.
- Resources - These are people who perform one or more tasks for an assignment. Refer to, , for more information.

3.1 Hiring Temp Workers

Hire a temporary worker from a job posting.

Temporary workers are hired through the contingent workflow in the SAP Fieldglass application. Before a person is considered a worker, the following general process is followed (the specific flow may vary based on your company's configuration):

- A buyer creates a job posting to specify all the details about the type of worker needed.
- The job posting is distributed to appropriate suppliers.
- Suppliers identify candidates that meet the requirements and submit them as job seekers.
- The buyer reviews the job seekers. Perhaps the job seeker is interviewed.
- The buyer decides to hire a job seeker. The process of hiring a job seeker creates a work order.
- The supplier accepts the work order.
- The buyer activates the work order.
- The new worker registers in the application that creates a worker record.

3.1.1 Creating Work Orders

Buyers can create work orders on the Job Seeker Details page, as well as the Job Seekers tab on the Job Posting Details page.

Context

On the Job Seeker Details page, buyers can choose the *Hire* or *Select for Hire* options to create a work order. These options are also available on the Job Seekers tab on the Job Posting Details page. Work order fields are populated based on the job posting template, and some can be changed during work order creation if they were configured to be editable on the job posting template.

To begin creating a work order, select the *Hire* action for the desired job seeker, then take the following steps:

Procedure

1. If desired, select the *Edit Details* link to update the Legal Entity, Work Order/Work Order Revision Owner, Business Unit, Site, and Location. The Edit Details modal displays, which allows you to make any necessary changes to these fields. Select *Change* to apply the changes and close the modal.
2. Continue to enter any necessary information. Reference the Field Definitions table to complete the work order.
3. Once you've entered all necessary information, select *Continue* to review the changes you made to the work order.
4. Select *Submit* to send the work order revision for approval.

Results

The work order is created in Pending Approval status. Once approved, the work order must be accepted by the supplier before the revision is finalized.

Work Order Field Definitions

The fields in this table provide information to help you create work orders for job seekers.

Fields and rules available during work order creation are based on your company's configuration as well as options defined on the job posting template selected. The information provided below supports a standard work order workflow and may not include all fields related to your contingent configuration. Note that some fields may default based on the job posting template, as well as your user settings.

Field	Description
Show requested terms/Show current terms	When enabled, the *Show requested terms* checkbox displays both the Final Terms and Requested columns in the Work Order Dates, Time Sheet & Expense Sheet Settings, and Worker Settings sections. When disabled, only the Final Terms column displays. When enabled, the *Show current terms* checkbox displays both the New and Current columns in the Work Order Dates, Time Sheet & Expense Sheet Settings, and Worker Settings sections. When disabled, only the New column displays. The preference for this field is carried forward from the Work Order page when the *Show requested terms* option is selected.
Edit Details	The *Edit Details* link allows you to make changes to the Legal Entity, Work Order/Work Order Revision Owner, Business Unit, Site, and Location. These fields are populated from the job posting by default.
Start Date/End Date	Enter or select the start and end dates for the work order. The dates are automatically populated based on the values from the job posting. Alternatively, you can select *Enter Job Duration* to have the end date automatically calculated based on the number of days.
Duration	Indicates the number of days for the work order. When used, this field is automatically updated when the Start Date or End Date is changed.
Trial End Date	If a trial period is required for the worker, you can enter a date here to indicate when it will end.
Time Sheet Start Date	Indicates the first day that workers can begin submitting time sheets.
Auto Register Job Seeker	Select *Yes* or *No* to indicate whether the job seeker should automatically be registered as a worker once the worker order is activated.
Worker Settings	Worker settings that appear on the Create Work Order form page are based on the job posting template settings. Only settings that are configured on the job posting template to allow changes during creation appear. Settings that are set on the template and can't be changed don't appear during creation. Those settings will display on the work order after it's created and saved.

Field	Description
Time and Expense Sheet Settings	Use the *Time Sheet Type* field to determine whether the worker will use time in/time out, standard, or no time sheets for their assignment. The *Time Sheet Frequency* field determines how often time sheets are generated for the worker. For example, you can choose bi-weekly frequency to indicate that the worker must submit their time sheets every two weeks. *Start Day of Week* determines when the first day of each week is on the worker's time sheets. Select *Yes* or *No* for the *Allow Worker to submit Time Sheets* field to determine if worker's are allowed to submit their own time sheets for approval, or if it must be submitted by their supplier.
Accounting	Use this section to make changes to the work order's rates. Rate options for the work order are based on your company's rate configurations and the job posting settings. If you decide to change the rate settings on the work order, consider using the *Recalculate Rates* link to factor in those changes to the *Average Rate used to calculate Committed Spend* value. If desired, you can add invoice adjustments to the work order using the *Name* dropdown menu under the Invoice Adjustments section. Suppliers can use these invoice adjustments to apply credits or debits to time sheet invoices submitted by the worker.
Time Sheet Allotments	Time sheet allotments can be added to the work order to apply values for certain items, such as housing, meal, or transportation costs on worker time sheets. Time sheet allotments can be configured to be entered by the worker on their time sheet, or to be applied automatically without their input.
Show Cost Allocation By	Use this section to allocate your spend by entering percentages or specific amounts. Select the *Percentage* option to allocate costs to different cost centers by entering a percentage. Select the *Amount* option to allocate costs to cost centers by entering a specific amount.
Cost Center	Select one or more cost centers that will be charged for costs associated with this work order. To add or remove cost centers, use the *+Add or remove Cost Centers* link. If multiple cost centers are added, you'll need to select a primary cost center and then enter the percentages or amounts that should apply to each one.

Field	Description
Buyer Reference	You can use this field to link the work order with other records of the same type for tracking or reporting purposes. For example, many buyers enter the employee identification number here.
Supplier Reference	Suppliers can use this field to enter information about the worker for tracking or reporting purposes, such as an employee ID number.
Purchase Order Number	Buyer can use this field to enter the number of the purchase order linked to the work order. Depending on your workflow, you may or may not have access to the purchase order number.
Comments to Buyer	Suppliers can use this field to leave any comments they feel the buyers needs to see.
Comments to Supplier	Buyers can use this field to leave comments for the supplier to see when reviewing the work order.
Attachments	You can add attachments as needed. Set the appropriate visibility option for your attachment. Options are Public, Private, and Restricted. Private attachments can only be seen by users in your company. Restricted attachments can only be seen by users in your company with permission to view restricted attachments. Public attachments are visible to buyers and suppliers who can view the work order.

3.1.2 Editing Work Orders

Work orders that haven't been confirmed can be edited to change the setup, the work order dates, and the time sheet settings.

Context

Work orders may require updates due to changes to the job requirements, the work schedule, the worker's availability, or the job duration. Work orders that are rejected may require changes in order to continue the workflow. Changes made prior to the worker registering are updates to the work order and don’t create a revision.

Work orders can be edited when they are in the following statuses:

- Pending Approval
- Created
- Rejected
- Activated

To edit a work order, select *Actions* > *Edit Work Order* , and then follow the steps below.

Procedure

1. To edit the dates, enter the new *Start Date* and/or *End Date*. Note that changes to the work order duration won't update the committed spend.
2. To change the setup, select the *Edit Details* link to update the Legal Entity, Work Order/Work Order Revision Owner, Business Unit, Site, and Location. The Edit Details modal displays, which allows you to make any necessary changes to these fields. Select *Change* to apply the changes and close the modal and return to editing the work order.
3. Update the time sheet settings, if needed.
4. Select *Update*.

Results

The work order is updated. It's important to note that the worker's committed spend won't be updated as a result of the changes made. This may impact subsequent approval levels, on-boarding tasks, and/or adjustments.

3.1.3 External Status Updates on Work Orders

When configured by a third-party system, real-time status updates are displayed on pending work orders.

Limited visibility into steps that are awaiting action in third-party systems can lead to onboarding delays or reduced productivity. To give buyers immediate insight into external workflows, real-time status updates display on work orders in Pending Approval status when configured by a third-party system.

Two connectors, External System Status Upload and Pending Worker Activity Item Download, are available to support the external status updates. To activate this functionality, these connectors must first be configured and populated with data.

On Work Order Details pages, a status banner shows external system status updates (including any error messages or comments) for steps that are occurring in external systems. A timestamp on the banner also shows when the status was last updated. For example, if an employee badge was printed, a status update may include a comment such as "Employee badge printed" and the time of the update. The update may also include the next step, such as "Employee must pick up badge."

3.1.4 Withdrawing Work Orders

Work orders and work order revisions can be withdrawn before a supplier takes action.

Context

Work orders and work order revisions can be withdrawn when they are in the following statuses:

- Pending Approval
- Created
- Pending Review
- Approval Paused

To withdraw a work order or work order revision, select *Actions* > *Withdraw,* and then follow the steps below.

Procedure

1. Select a reason for the withdrawal.
2. Optionally add any necessary comments.
3. Select *Withdraw*.

Results

The work order or work order revision is withdrawn. Once withdrawn, the work order or work order revision is removed from the supplier view, including supplier reports, and the status is changed to Withdrawn. You can choose the *Edit* button on withdrawn work orders and work order revisions to make additional changes and resubmit the revision for approval. You can also choose the *Remove* button to remove the revision. Work orders and work order revisions can't be closed while a revision is pending approval.

> Note
>
> The Withdraw action isn't available for external approvals.

3.1.5 Spend Matrix

Calculate spend on multiple line item purchase orders using work order line items.

The Spend Matrix functionality is enabled with the company configuration, *Cost allocation is based on spend matrix* with the subconfiguration, *Work Order* enabled. This feature only applies to contingent work orders.

When multiple line item purchase orders are used, Spend Matrix changes how spend is calculated. Budget allocation is done per line item and committed spend is calculated using the sum of spend defined per line item on a work order. This configuration can't be enabled if any of the following configurations are enabled:

- Work order change requests
- Disallow Approval of Credit/Debit Memo (all options)

> **Note**
>
> Spend Matrix is also used with Assignment Management. For information on how it works there, refer to the *Assignment Management* guide.

Spend Matrix Admin Object

The Spend Matrix admin object in the Financial Data section of Admin Configuration displays when the configuration is enabled. There is one predefined matrix available, *Work Order Spend Matrix*. The matrix specifies the line item structure used to define and control spend. The predefined matrix includes the following:

1. PO Line Number
2. Cost Center
3. Rate Category

Additional matrices can't be created. When this feature is used on a job posting template, this structure is automatically applied on the work order.

There is a user role administrative permission, *Spend Matrix* > *View*. Users with this permission can view this admin object.

Contingent Type/Job Posting Template Rule

When the configuration is enabled, the rule, *Use Spend Matrix to determine cost allocation structure and budget validation*, displays on job posting types and templates. When this rule is set to *Yes*, the Spend Matrix functionality is evoked. Contingent work order and work order revision pages are changed with this feature. Once the rule is set on the job posting template, it can't be changed when creating the job posting. The following rules can't be enabled when this rule is enabled:

- Hours/Days for Estimated and Committed Spend can't be set to System Calculates
- Auto Engage Job Seeker
- Disallow Approval of Time Sheet/Expense Sheet/Invoice when Committed Spend is Exceeded or Committed Spend is Exceeded for Cost Center
- Disallow Approval of Expense Sheet when Maximum Expense Spend is Exceeded
- Disallow Approval of Time Sheet/Expense Sheet/Invoice when Job Posting Estimated Spend is Exceeded
- Use Rate Change Matrix
- Enable Shift Manager
- Auto Engage Job Seeker

- Work Order Approvals (only Use approval group if found for Work Order can be used)
- Work Order Revision Approvals (only Use approval group if found for Work Order Revision can be used)
- Enable Rebillable Resource Fields

Changes to Work Order and Work Order Revision

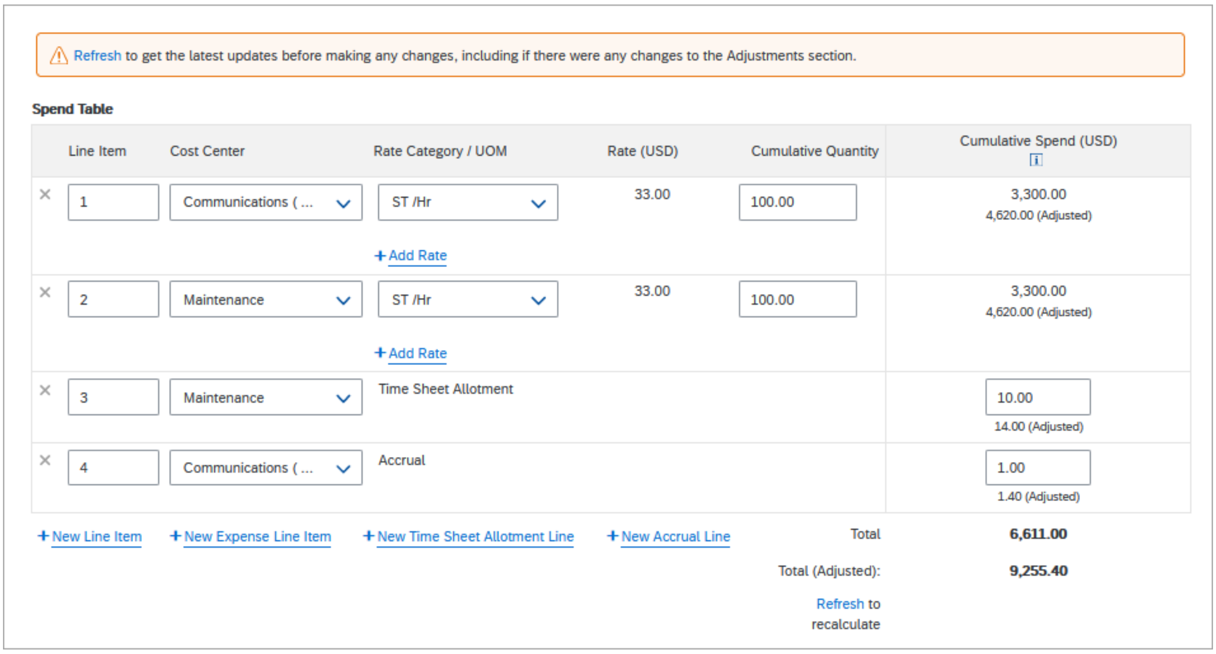
When Spend Matrix functionality is used, there is no change to the process of creating the job posting. The spend table displays when the buyer hires a job seeker. Work orders/work order revisions display with the following changes:

- **Time Sheet & Expense Sheet Settings** - In this section, the Hours per Day, Hours per Week, Hours for Committed Spend, and Maximum Expense fields don't display.
- **Accounting/Rates** - In this section, the Committed Spend flag column and the Average Rate used to calculate Committed Spend row don't display.
- **Accounting** - This section doesn't display.
- **Cost Allocation** - In this section, the Allocation fields and Total Allocation field don't display. You can add or remove cost centers, add segmented object detail attribute type details to cost centers, select the primary cost center, and add task codes. Additionally, the *Spend Table* displays here.
- Spend validation is done against each line item instead of at the work order or cost center level.

> **Note**
>
> The Quick Hire option isn't available on job postings that are using Spend Matrix.

Spend Table - Create Work Order

The fields from the Spend Matrix display as the columns on the *Spend Table* section. You define the Spend Matrix fields. The Line Items and Cost Centers are preselected. The user can change them or select *X* to remove them.



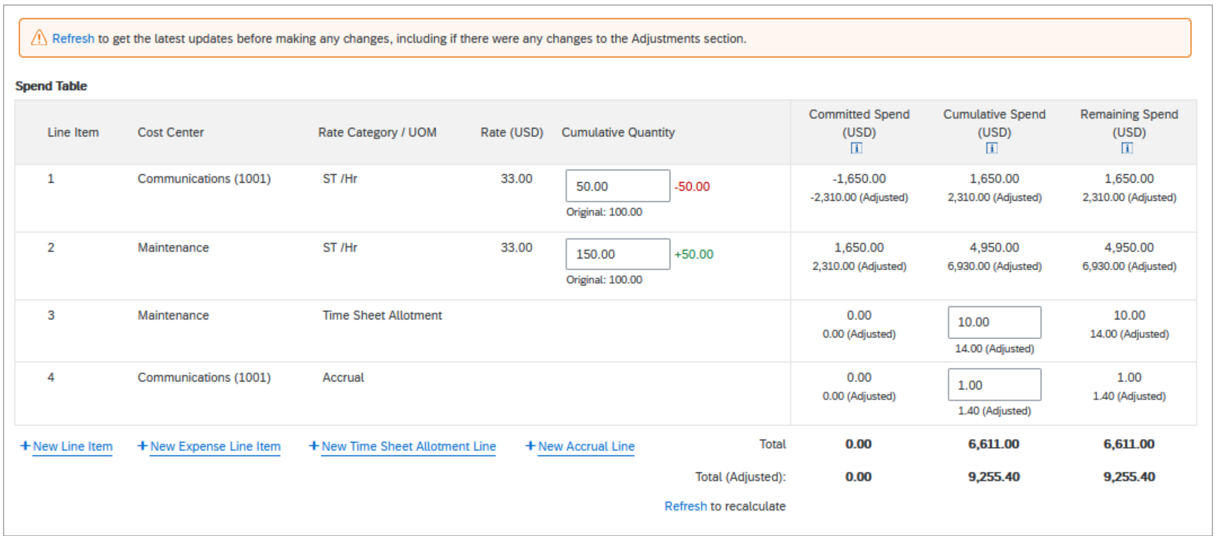
The columns that display are:

- *Line Item* - Line item numbers are automatically assigned.
- *Cost Center* - Cost centers default from the job posting unless cost center changes were made to Cost Allocation.
- *Rate Category/UOM* - Select the rate category or unit of measure from the drop-down. The rate value autofills in the *Rate* column. The *+Add Rate* link can be used to add additional rate categories to the line item.
- *Cumulative Quantity* - Enter the number of hours (or other UOM) in this field. This column doesn't apply to expenses, time sheet allotments, or accruals.
- *Cumulative Spend* - For rate lines, this column is populated based on the values entered in Cumulative Quantity. For expenses, time sheet allotments, or accruals, enter the spend amount. If there are adjustments on this work order and the adjustment flag, *Include in Estimated and Committed Spend*, is enabled, the adjustment amount is included in the Cumulative Spend column when you select *Refresh*.
- The *+New Line Item* link allows you to add additional line item cost centers from the available list.
- The *+New Expense Line Item* link allows you to add additional line item cost centers for expenses.
- The *+New Time Sheet Allotment Line* link allows you to add additional line items for time sheet allotments. This option only displays if rate schedule is used and the assigned rate schedule has a time sheet allotment. If the rate schedule has a time sheet allotment, you must add a time sheet allotment line to the spend table.
- The *+New Accrual Line* link allows you to add additional line items for accruals. This option only displays if rate schedule is used and the assigned rate schedule has an accrual rate. If the rate schedule has an accrual rate, you must add an accrual line to the spend table.

> **Note**
>
> Each time changes are made to the spend table, select *Refresh* to apply the changes to the adjusted amount.

Spend Table - Create Work Order Revision

During a work order revision, the Spend Table displays with information from the most recent revision.



Line Item	Cost Center	Rate Category / UOM	Rate (USD)	Cumulative Quantity	Committed Spend (USD)	Cumulative Spend (USD)	Remaining Spend (USD)
1	Communications (1001)	ST /Hr	33.00	50.00 -50.00 Original: 100.00	-1,650.00 -2,310.00 (Adjusted)	1,650.00 2,310.00 (Adjusted)	1,650.00 2,310.00 (Adjusted)
2	Maintenance	ST /Hr	33.00	150.00 +50.00 Original: 100.00	1,650.00 2,310.00 (Adjusted)	4,950.00 6,930.00 (Adjusted)	4,950.00 6,930.00 (Adjusted)
3	Maintenance	Time Sheet Allotment			0.00 0.00 (Adjusted)	10.00 14.00 (Adjusted)	10.00 14.00 (Adjusted)
4	Communications (1001)	Accrual			0.00 0.00 (Adjusted)	1.00 1.40 (Adjusted)	1.00 1.40 (Adjusted)
+New Line Item	+New Expense Line Item	+New Time Sheet Allotment Line	+New Accrual Line	Total	**0.00**	**6,611.00**	**6,611.00**
				Total (Adjusted):	**0.00**	**9,255.40**	**9,255.40**
				Refresh to recalculate			

- *Cumulative Quantity* - The *Cumulative Quantity* column can be changed. The number that defaulted from the most recent revision remains displayed below the entry field with the label *Original*. The amount of the increase or decrease displays to the right of the entry field. Decreases display in red and increases display in green. If the rate was changed during the revision on a rate category/UOM, a sub row is automatically added to the line when Refresh is triggered. Use the new line to enter the number of hours at the new rate. If a change is done that causes the cumulative committed spend to drop below the actual spend for any line, an error occurs.

- The *+New Line Item*, *+New Expense Line Item*, and *+Add Rate* links are available during a revision.

Additional Considerations for Adjustments

- When site tax is added to a work order that uses spend matrix, the site tax is ignored when calculating the cumulative and total committed spend.
- When there's a rate component, adjustments are only applied to taxable components.
- When the site uses an expense code adjustment and the work order uses spend matrix, the expense code adjustment from the adjustment group isn't applied.

Reset Spend on Closed Workers

When a job posting uses spend matrix and a worker is being closed, the committed spend can be reset to the actual spend so that the remaining amount is available to be used for other workers' time and expenses. When closing a worker, the flag, *Reset Committed Spend to Actual Spend*, displays. When the flag is set to *Yes*, the committed spend for each line on the work order spend table is reset to the actual spend, including the applicable adjustment amount.

The flag only displays when the *Allow Further Invoicing* flag is set to *No* because, if additional invoices are coming, the additional amount is needed. When *Allow Further Invoicing* is set to *Yes*, a work item is triggered that prompts the buyer to reset the flag to *No* to stop additional invoices after the worker is closed. When the work item is acted on and the *Allow Further Invoicing* flag is changed to *No*, the flag, *Reset Committed Spend to Actual Spend*, displays and can be set to *Yes* at that time.

When workers are being closed using a bulk action, if *Allow Further Invoicing* is set to *No*, the field, *Reset Committed Spend to Actual Spend*, displays when at least one of the workers is on a work order using spend matrix. The value selected applies to all those workers.

Some users are in roles that allow them to change the value of the *Allow Further Invoicing* flag from *No* to *Yes* on closed workers. The action these users see is *Manage Invoicing*. When a worker is closed with the *Reset Committed Spend to Actual Spend* set to *Yes*, the Manage Invoicing option is suppressed.

> ⓘ Note
>
> Only the cumulative committed spend is updated; not the hour and rate values.

Miscellaneous Invoice

Suppliers can create miscellaneous invoices when spend matrix is used as long as there's an approval group for miscellaneous invoices. There's no change to the supplier process of creating the miscellaneous invoice. When the buyer approves the miscellaneous invoice, on the approval modal, the field, *Select PO Line Number*, displays. It displays for the first approval level and continues to display in all levels of the approval group.

Subsequent approvers can change the selection. This dropdown field contains a list of valid PO Line Number and Cost Center combinations. When a selection is made, the remaining spend for that line number displays. A validation is done to make sure that the amount of the miscellaneous invoice doesn't cause the actual spend to be more than the committed spend.

> ⓘ Note
>
> Approvers aren't able to use e-mail approvals if the *Select PO Line Number* field isn't populated. Once it's populated, subsequent approvers can use e-mail approvals. Additionally, bulk approvals for miscellaneous invoices that use spend matrix are blocked.

Reporting

When the spend matrix functionality is enabled, reporting includes the viewable spend details on the Work Order, Work Order Revision, Worker, Time Sheet, Expense Sheet, and Invoice modules. You can create spend matrix-specific reports by selecting the fields from the Spend Matrix reporting subcategory. For best results, use separate reports based on whether or not spend matrix information is present.

Integrations

The following connectors can be used to upload work orders, work order revisions, and work order cost allocations when a related job posting uses the spend matrix functionality:

- Work Order Revision Delta Upload
- Work Order Revision Upload
- Work Order Upload

There is a specific connector called *Work Order Cost Allocation Spend Matrix Upload that* can be used to upload spend matrix information for work orders.

3.1.6 Change Work Order Setup

The Change Work Order Setup feature enables buyers to change the setup information on a work order during the creation process or at any time before the worker registering.

Work order setup information defaults from the related job posting and includes job posting owner, business unit, site, and location. If this feature is enabled, when a job posting is created for multiple positions, the setup information that defaults can be changed on each individual work order.

This feature also enables buyer users to change custom fields on a work order. Allowing these changes to the setup and custom fields before worker registration enables buyers and suppliers to review accurate work order information during the approval and acceptance process. This also ensures that the data included in integrations is correct.

To use this feature, enable the *Allow Edits to Setup (Owner, Business Unit, Site/Location) and Custom Fields on Unconfirmed Work Orders* company configuration option. When enabled, changes can be made to the setup on work orders by using the *Actions* > *Edit Work Order*.

When this feature is enabled, changes made to the work order setup and custom fields:

- Don't create a work order revision.
- Are tracked in the System Audit Trail and don't impact the related job posting.

For job postings that use both auto engage and auto register, work orders are automatically created and in a confirmed status. A revision must be used to change the setup on work orders in a confirmed status.

The setup can be edited before the worker registers on work orders with the following statuses:

- Pending Approval
- Approved
- Created
- Accepted
- Activated

Change Work Order Setup

Work order setup can be changed using the following actions:

- Change the Setup during Work Order Creation - From the Details section of the Create Work Order page, select the *Edit Details* link and make the desired changes. Select *Change*.
- Edit a Work Order to Change the Setup - On the desired work order, select *Actions* > *Edit Work Order*. When this feature is enabled, the Setup section appears on the Edit Work Order page and changes can be made by selecting values in the New column. Select *Update* to save the changes.

> Note
>
> The Edit Work Order action is also used to change the start day of week and the work order dates. This feature only covers changes made to the work order setup.

Impacts to Work Order Approvals

When a change is made using the *Edit Work Order* action, it could impact an approval that is already in progress. When an approval process has started, the approval group isn't changed even if a change is made to the work order setup that would route to a different approval group. Additionally, the current level of approval isn't impacted but the remaining approval levels may be impacted because the system looks back to the work order for each level of approval.

3.2 SOW Worker Engagement

SOW workers are submitted to statements of work by suppliers who manage the service agreement.

SOW workers don't go through the standard hiring process like contingent workers. Instead their engagement on a project is handled by the supplier and they're submitted as part of the statement of work response and acceptance. Once submitted, if your company requires approval, SOW workers may be reviewed and approved or rejected.

When an SOW worker is submitted and approved a work order is automatically created, and based on the terms of the service agreement, they'll either be auto-registered or need to register to create an account. A corresponding worker record is created once the SOW worker is registered. The work order and worker record are then managed by buyer and supplier users according to the rules on the statement of work.

3.3 Consolidated Worker

This feature allows historical workers, profile workers, contingent workers, and SOW workers to be linked in one master record.

The Consolidated Worker feature allows buyers to view the tenure of workers to see all of their assignments. This feature allows historical workers, profile workers, contingent workers, and SOW workers to be linked in one master record upon creation of a worker. When new workers are created, the application attempts to match them to a consolidated worker. If the only match found is a strong match, the new record is automatically linked to an existing master record. If only one match is found, but it isn't a strong match, no automatic linking occurs.

Consolidated workers aren't associated to job seeker records and workforce records. Consolidated workers also have no association to legal entities, cost centers, business units, sites, or MSPs. Buyers with permission to view consolidated workers are able to see a list of all associated records (such as work orders and workers) regardless of visibility permissions. However, they can't access associated records that they don't have permission to view. For example, they can't access records associated with sites or business units that they don't have permission to view.

When this feature is enabled, existing workers aren't automatically linked to consolidated workers. Contact your SAP Fieldglass administrator to perform the actions necessary to link the existing records.

3.3.1 Consolidated Worker Setup

Configure historical workers, profile workers, contingent workers, and SOW workers to be linked in one consolidated worker.

To set up the consolidated worker in the company configuration, confirm that the *Security Information* feature is set and *Consolidated Worker* is enabled. A unique ID displays as an optional field for job seekers, SOW workers, and profile workers.

Optionally, you can mask worker unique IDs by selecting the *Display Unique ID Masked (value is always stored encrypted)* configuration option. When enabled, only users with the *View and Report on Sensitive Data* user profile option enabled are able to view the unique ID.

Label text can be included for the *Unique ID* field to describe the type of value that can be entered, or if the field must be left blank.

Defining Strong Matches

By default, the logic determines when a match is strong. When a new worker is created, if the only match found is a strong match, the new record is automatically linked to an existing master record. If only one match is found or if more than one match is found that aren't strong, no automatic linking occurs.

First + Last Name	Security ID	Unique ID	Strength of Match
Match	Match	Match	Strong
No Match	Match	Match	Strong
Match	Match	Blank on document	Strong
No Match	Match	Blank on document	Strong
Match	Blank on document	Match	Strong
No match	Blank on document	Match	Strong

The *Consolidated Worker* company configuration, *Combine attributes to create a strong match*, changes how a strong match is defined. When enabled, a strong match occurs with a different logic:

First + Last Name	Security ID	Unique ID	Strength of Match
Match	Match	Match	Strong
No Match	Match	Match	Strong
Match	Match	Blank on document	Strong
Match	Blank on document	Match	Strong

3.3.2 Consolidated Worker Assignments

When *Consolidated Worker* is enabled and a new document is created, the system searches for matches to existing consolidated workers.

The search for existing consolidated workers occurs at different points in the workflow depending on the type of document: historical worker, profile worker, or work order (contingent or statement of work).

SAP Fieldglass creates a new consolidated worker if it finds any of the following:

- No match to an existing consolidated worker
- One match that isn't strong
- Multiple matches of any strength

SAP Fieldglass matches to an existing consolidated worker when it finds only one match and the match is strong.

In some workflows, when the buyer user has the appropriate permission, the user can decide whether to link to an existing consolidated worker or create a new consolidated worker. When multiple users have the option to select consolidated worker, the selection of the final user is used. (EXAMPLE: The work order creator selects a consolidated worker, then the work order approver selects a different consolidated worker. The approver's selection is the consolidated worker that gets associated to the work order.)

Creating or Linking Consolidated Workers

Historical Worker Records

Since historical records are uploaded, the system links to an existing consolidated worker upon upload if there's only one consolidated worker match and it's a strong match. In any other scenario, a new consolidated worker is created. If there are no strong matches or multiple matches, a new consolidated worker is created.

Profile Workers

Consolidated Workers are created or linked when profile workers enter open status.

Buyer users with the user role permission *Profile Worker* > *Select Consolidated Worker* can manually select a consolidated worker when creating a profile worker or when acting as an editor during the profile worker approval process.

When a profile worker is approved through the Approve Reject Item Upload and multiple matches of any strength are found, a new consolidated worker record is automatically created and the profile worker is associated to it. If you have the *Profile Worker* > *Select Consolidated Worker* user role permission enabled, you can still manually choose the consolidated worker record when creating a profile worker.

Contingent Work Order

Consolidated workers are created or linked when the work order is accepted by the supplier.

If the job posting rule *Auto Engage* is enabled, and there's a single strong match, the system links the worker record to an existing consolidated worker. A new consolidated worker is created when there isn't a strong match or there are multiple matches.

SOW Work Order

Consolidated workers are created or linked when the work order enters the accepted status, after any buyer approvals.

Buyer users with the user role permission *SOW Worker* > *Select Consolidated Worker* can manually select a consolidated worker when approving an SOW work order.

Considerations

The Fieldglass consolidated worker Approval Based on Matching Logic custom script is available to route documents for conditional approval when the system finds at least one match to an existing consolidated worker, regardless of match strength. To route documents for conditional approval for approval groups, this script must be enabled and include an editor level approver. The script, which can be used in approval groups for profile worker, work order, and SOW worker, only controls the routing, not the ability to select the consolidated worker.

An SAP Fieldglass representative must enable this script for the company so the buyer can select it on the approval group.

3.3.3 Viewing Consolidated Workers

The consolidated worker includes the consolidated worker ID, the worker name, the unique ID, and the security ID.

When enabled, the consolidated worker is available from the home page by navigating to the *Worker* menu and selecting *Consolidated Worker*. Consolidated worker includes the consolidated worker ID, the worker name, the unique ID, and the security ID. Users with the appropriate user profile flags can view a consolidated worker by selecting it from the Consolidated Worker list page. The Details tab displays the records that are currently linked with the consolidated worker (Unique ID and Security ID display masked based on the buyer setup). Linked documents contain different details. The site configuration *Suppress Worker Personal Details* doesn't apply to consolidated workers. Users with permission to view consolidated workers have access to all of their information.

The Assignments tab includes all of the documents that the worker is linked. Details such as the duration of each assignment and, if applicable, the gap between assignments is displayed. The Total Duration of Days Worked Excluding Gaps is shown at the bottom of the list.

The information displayed on the Tenure tab depends on how company configuration option is enabled.

> ⓘ Note
>
> The document ID on the Assignments and Tenure tabs is a link to the original linked document.

The Approvals/Audit Trail tab shows the approvals as well as the audit trail of all changes made to the consolidated worker, including the name of the person who made the change and the timestamp.

Potential Consolidated Worker Matches List

The Potential Consolidated Worker Matches List is available via the List View admin object to help buyers review and compare potential consolidated worker matches more efficiently. The list view displays key worker identifiers, such as Security ID and other configurable fields, allowing users to better assess whether records should be linked to the same consolidated worker.

Consolidated Worker Badge Area

In the badge area at the top of the Consolidated Worker, the Earliest Start Date, Latest End Date, and Has Active Assignments fields display. These values are adjusted by the system when:

- A new document is added with an earlier start date or later end date.
- The start date on an existing document is updated with an earlier date.
- The end date on an existing document is updated with a later date.

The Earliest Start Date is displayed at the top of all documents associated with the consolidated worker. The date displays at the top of all worker records, including contingent, statement of work, profile workers, and historical workers. This value also displays on work orders and work order revision. The date is a link that jumps users to the Assignments tab of the consolidated worker.

3.3.4 Updating Consolidated Workers

Consolidated workers are updated automatically and manually.

Consolidated Workers are updated in two ways:

- Automatic updates - Updates are triggered when linked documents are edited and the updates impact consolidated worker field values. For example, if a worker record is edited to change the supervisor, the new supervisor is automatically changed on the Tenure tab of the consolidated worker.
  Automatic updates also include changes to field values on newly added system-linked documents. For example, when the system links a matching document and the address information of a worker has changed, the consolidated worker address fields are updated with the latest information.
- Manual updates - Consolidated workers can also be manually updated, as needed. Users can edit the consolidated worker details including security ID, email, address information, adding new documents, and removing linked documents. These actions can be performed directly from the consolidated worker *Actions* menu.

Auto-Update Consolidated Workers

Consolidated workers fields are automatically updated when:

- Edits are made to linked documents that impact the consolidated worker fields.
- Documents are linked by the system upon creation and consolidated worker fields are updated with the new information.

At various points in the workflow, edits to linked documents trigger the system to update consolidated worker fields. If a document is missing a consolidated worker field or contains a blank value, the current values remain unchanged on the fields of the consolidated worker.

When new documents are automatically linked to an existing consolidated worker (except for historical workers), the system updates the consolidated worker fields with field values from the new document.

- If there's no data to copy for a particular field (such as Address 1), this field retains its original value.
- If the document contains custom fields that are enabled to display on consolidated workers, these custom fields are visible on the Details tab of the consolidated worker.

Edit Consolidated Worker Details

Select *Edit* from the *Actions* menu to update the details of the consolidated worker.

Once updates are completed, select *Submit* to save the changes, or select *Continue* to add additional documents to the consolidated worker.

Add Documents to Consolidated Workers

Documents that are linked to a consolidated worker can be transferred to a different consolidated worker. Documents must be in the correct status to be added to consolidated workers. Manually added documents aren't subject to the matching process.

> **Note**
>
> Only documents that are currently associated to a consolidated worker are available to be linked. Existing worker documents that were before enabling the *Consolidated Worker* company configuration aren't automatically linked to consolidated workers. Contact your SAP Fieldglass representative for more information on linking existing documents.

To manually link documents to a consolidated worker, select *Edit* > *Continue* > *+Add Other Documents*. Select the desired documents. If no other documents are assigned to the old consolidated worker, it's deleted.

Remove Documents from Consolidated Workers

In cases when a linked worker document must not be associated to the consolidated worker, users with the proper permissions can remove the document and create a new consolidated worker for that document. To create a new consolidated worker, from the *Actions* menu select *Create Consolidated Worker*. This action is available only when at least two documents are associated to the consolidated worker.

The fields from the original consolidated worker populate the new consolidated worker. Update the values as needed. When the details are complete, select *Continue* to select records to link to the new consolidated worker.

Select the documents that transfer to the new consolidated worker. One or multiple documents can be selected. Select *Continue* to review the details, and then select *Submit* to save the changes.

3.4 Work Order Change Request

The Work Order Change Request feature allows buyers to make changes to work orders and work order revisions for a specified date range.

When a work order change request is completed, the SAP Fieldglass application automatically generates the necessary work order revisions to accommodate the changes over the date range selected. The changes that are made using a work order change request can be made to native and custom fields and can be applied to previous work orders and their revisions.

This feature allows buyers to make corrections to work orders that are not supported by worker edits or work order revisions, such as:

- Changes to work orders that have multiple revisions.
- Changes that can't be applied over a specific date range that doesn't directly coincide with the work order/ work order revision dates.

- Changes to both native and custom fields.
- Changes that may not require approval or supplier acceptance.

> ⓘ Note
>
> Work order change requests cannot be created for work orders that use rate schedules.

3.4.1 Work Order Change Request Setup

Work Order Change Request Setup

Required Setup

To set up this feature, enable the *Create Work Order Change Requests* company configuration option. When this option is enabled, *Create Work Order Change Request* is an option in the *Actions* menu of work orders.

Optional Setup

These setup options can be completed to ensure the desired use of this feature:

- Enable the Work Order Change Request User Role Permissions - Users who will be allowed to view, manage, and approve work order change requests must be in a user role with the Work Order Change Request user role permissions enabled. Options are View, Submit, Approve, and Close. Suppliers must also have the appropriate user role permissions to view and respond to work order change requests.
- Define Reason Codes - A reason is required in order for buyers to reject or close work order change requests.
- Create Custom Labels - Custom labels can be created for the Work Order Change Request fields using the *Custom Text* option in the Configuration section of the Admin menu.
- Create Approval Groups - Approval groups can be created for work order change requests. Approval groups created for the Work Order Change Request module must be Amount Based because the financial impact of the Work Order Change Request isn't calculated until the related work order revisions are generated, which is after the Work Order Change Request is approved. Work Order Change Request approval groups can only be configured using a Company level scope.
  If an approver user is derived from a value on the base work order, and that value is changed on a Work Order Change Request, the new value determines the approver. For example, if the cost center owner is an approver and the cost center is changed on a Work Order Change Request, the new cost center determines the cost center owner approver.
- Enable Messages - Default messages are available to be enabled and/or customized for the Work Order Change Request module.

Considerations

When setting up the Work Order Change Request feature:

- If the *Work order spend is not recalculated on work order revision* company configuration option is enabled, the Work Order Change Request feature can't be enabled.
- The *Allow manage Cost Center on creation of Work Order and Work Order Revision only for Contingent Workers* and *Allow Edits to Setup (Owner, Business Unit, Site/Location*company configuration options don't impact the use of this feature.

- Work order change requests cannot be created for work orders that use rate schedules.

3.4.2 Work Order Change Request Usage

A work order change request can be created when a work order is in Confirmed status and there isn’t a work order revision in progress.

> ⓘ Note
>
> Work order change requests can't be created for work orders that use rate schedules.

Create Work Order Change Requests

To create a Work Order Change Request, open the work order and select *Actions* > *Create Work Order Change Request*. A *Start Date* and an *End Date* must be entered for the Work Order Change Requests. The start date can be any date from the start date of the worker through the end date of the worker. The end date can be any date from the start date of Work Order Change Requests and extended as needed.

When the Work Order Change Requests is created, the system generates work order revisions. If approvals are required, the work order revisions are generated after the changes are approved. There are three kinds of changes that can be applied using a Work Order Change Requests:

- Field Changes - The general fields on a work order such as Legal Entity, Business Unit, Owner, and Site can be changed using the Add Fields link.
- Cost Allocation Changes - Cost centers can be removed or added and the allocation percentage can be updated. Select the *Cost Allocation Changes* checkbox to make changes.
- Rate Changes - Rate can be added or removed. The Final rate and the MSP fee fields can also be updated. Select the *Rate Changes* check box to make changes.

The changes available to be made are based on the Type selected. One of the following work order change request types must be selected when creating a Work Order Change Request.

- *Selected Fields will Change (with Approval)* - When this Type is selected, fields selected by the user are changed. All other fields retain the values from the original work order or the values that have been changed on existing work order revisions. Once changes are submitted, the Work Order Change Requests need to be approved and accepted by the supplier before the work order revision is generated.
  The following changes can be applied when this type is selected:
  - Field Changes
  - Cost Allocation Changes
  - Rate Changes
- *Selected Fields will Change (Without Approval)* - When this Type is selected, fields selected by the user are changed. All other fields retain the values from the original work order or the values that may have been changed on existing work order revisions. This option doesn’t require approval in order for a revision to be generated. However, if the Work Order Change Requests are routed to the supplier for acceptance, *Yes* must be selected for the *Do changes require Supplier acceptance?* option.

The following changes can be applied when this type is selected:

  - Field Changes
  - Cost Allocation Changes

Rate Changes can't be made on a Work Order Change Requests when this type is selected.

- *All Fields will be Changed (With Approval)* - When this Type is selected, all fields from the work order version selected are applied to the all of the work order revisions that are within the date range entered on the Work Order Change Requests. If there are existing work order revisions, changes made with a Work Order Change Requests affect all fields. It's important to select the version that must be used as the basis for the Work Order Change Requests. The version selected determines the source of the default field values.
  The following changes can be applied when this type is selected:
  - Field Changes
  - Cost Allocation Changes
  - Rate Changes

Manage Work Order Change Requests

Users with appropriate user role permissions can view, submit, and close work order change requests.

Viewing Work Order Change Requests

Viewing Work Order Change Requests - When this feature is enabled, *Work Order Change Request* is an option on the View menu. The module code used for the Work Order Change Requests ID is CR. To view a work order change request, select the ID from the list.

The Details tab displays general details about the Work Order Change Requests as well as the fields that were changed. The Lifecycle tab displays an audit trail and any approvals, if applicable. The Related tab displays a list of all related documents including the original work order and any existing work order revisions.

Completing and Submitting Draft Work Order Change Requests

Work order change requests can be created and saved in Draft status. When a Work Order Change Requests exists in Draft status, work order revisions can't be created for the work order. Draft Work Order Change Requests can be completed and submitted as needed. If a submitted Work Order Change Requests exists and another Work Order Change Requests is created with overlapping dates, it can't be submitted until previous Work Order Change Requests are completed. The new Work Order Change Requests must be saved in Draft status or the dates must be changed.

Work Order Change Requests in Draft status can be edited by the creator. Once submitted, Work Order Change Requests can only be edited by an approver with editor level approval.

Closing Work Order Change Requests

Work order change requests can be closed when they have the following statuses:

- Draft
- Rejected
- Declined

Considerations

If the job posting associated to a worker has the flag *Creator can add and remove Rate Code or Rate Schedules* set to *No*, the worker rates can't be changed using a work order change request. The Rate Changes section of the Work Order Change Requests aren't displayed.

Work order change requests that don't require approval can't be used to extend a worker's end date.

If the end date on a work order change request is before the original worker end date, and the site is changed, activity items aren't based on the new site. If the end date on the Work Order Change Requests is equal to or after the worker end date and the site is changed, the worker record will be updated and the activity items will be associated to the new site.

3.4.3 Work Order Change Request Scenarios

Scenarios explain how the Type of Work Order change request created impact Work Orders and Work Order revisions based on the date range entered.

Scenario 1 - Work Order Change Request Type = Selected Fields Will Change (With Approval)

The original Work Order has three versions - an original Work Order and two revised Work Orders.

- WO 0 – The original Work Order.
- WO (Rev1) – A revision was completed with the start date 11/25 and an end date 12/27. The Business Unit was changed for this time period.
- WO (Rev2) – A revision was completed with the start date 12/9 and an end date 12/27. The Cost Center was changed for this time period.

It's determined that the rate should have been increased to $35 on 11/18 and remained as the rate until the end of the work, 12/27. A Work Order change request is created and the rate change is made and submitted and approved.

Changes are applied in the following manner:

- The original Work Order that previously started 11/4 and ended 11/24 is split into two. The original Work Order now starts on 11/4 and ends 11/17. A new Work Order Revision is added with a start date of 11/18 and an end date of 11/24. This revision has the rate change.
- The existing Work Order Revision that changed the Business Unit on 11/25 is retained. Only the Rate has been changed on it since the Type selected was *Selected Fields will change (with approval)*.
- The existing Work Order Revision that changed the Cost Center on 12/9 is retained. Only the Rate has been changed.

Scenario 2 - Work Order Change Request Type = Selected Fields Will Change (Without Approval)

A Worker has the following revisions:

- WO 0 – The original Work Order.
- WO (Rev1) – A revision was completed with the start date 11/18 and an end date 12/27. The Business Unit was changed for that time period.
- WO (Rev2) – A revision was completed with the start date 12/16 and an end date 12/27. The rate was changed to $32.

It's determined that the owner should be changed to Joanne Scott during the period of 11/11 through 12/20 returning to the original owner from 12/21 through 12/27. A Work Order Change Request is created that must be accepted by the supplier before the revision can be generated. The change is made and accepted by the supplier. No approval is required and the revision is generated.

Changes are applied in the following manner:

- The original Work Order that previously started 11/4 and ended 11/17 is split into two. The original Work Order is now starts on 11/4 and ends on 11/10. A new Work Order Revision is added with a start date of 11/11 and an end date of 11/17. This revision has the Owner change. All other fields on both versions are retained.
- The existing Work Order Revision that changed the Business Unit on 11/18 is retained. Only the Owner has been changed on it since the Type selected was *Selected Fields will change (without approval)*.

Scenario 3 - Work Order Change Request Type = All Fields Will Change (With Approval)

The original Work Order has four versions; an original and three revised Work Orders:

- WO 0 – The original Work Order.
- WO (Rev1) – A revision was completed with the start date 11/18. The rate was changed.
- WO (Rev2) – A revision was completed with the start date 11/25. The Business Unit was changed.
- WO (Rev3) – A revision was completed with the start date 12/9. The Cost Center was changed.

It's determined that the Site should have been changed to Chicago on 12/2 and remained as the Site until the end of the work, 12/27. Since the date of this change is 12/2, the Work Order in effect at that time must be selected because that is the Work Order that is used as the basis for the Work Order Change Request. In this example, revision 2 should be selected. A Work Order Change Request is created and the change is submitted. Once approved and accepted by the supplier, the revision is generated.

Changes are applied in the following manner:

- There are no changes to revisions 0 and 1.
- The existing Work Order Revision that changed the Business Unit on 11/25 was used as the basis for the Work Order Change Request. The Site has been changed. Since the Type selected was *All Fields will be changed (with approval)*, all the field values that don't have changes on later versions have been applied to all remaining versions.

- The existing Work Order Revision that changed the Cost Center on 12/9 is updated with the information from Work Order Revision 1 since it's the basis of the Work Order Change Request.
- A fourth Work Order Revision starting on 12/2 and remaining to the end of the work changes the site to Chicago.

4 Managing Workers

Worker management includes updating worker records as needed and completing maintenance tasks such as name changes, resetting passwords, managing absences, and tracking time and expenses.

Multiple actions can be taken on worker records to ensure they are accurate and up-to-date. Available actions are often based on user role permissions and your company's setup. Activity items can be used to manage tasks that need to be completed during a worker's assignment, such as certification requirements, training, and onboarding and offboarding tasks. These tasks can be managed by buyers and suppliers on the Management tab of the worker record. Tasks that are assigned to the worker display on their Home page.

This section includes information on commonly used management tasks that can be performed from worker records and work orders.

4.1 Updating Worker Records

Worker and work order records can be updated through edits and revisions by buyer and supplier users in the SAP Fieldglass application.

Depending on which changes need to be made, you can either edit the worker record, or create a revision for the work order. For example, buyers and suppliers can use the *Edit Worker* action on the worker record page to edit the worker's name, invoice adjustments, or custom fields. Similarly, buyers can use the *Revise Worker* action on the work order or worker record to create a worker order revision and change work order settings such as the work order end date, or time and expense sheet flags. Work order revisions require approval, however, edits to workers don't.

Work order revisions are typically used for changing fundamental details for the worker's assignment, such as its length or the bill rate. If a work order revision is created by a buyer, it must go through the approval process set up for their company before the changes are applied.

4.1.1 Worker Revisions

Work orders can be revised by creating a full work order revision or using the quick revision feature.

Buyers with the *Work Order Revision* user role permissions can use the work order revision action on worker and work order records. Creating a work order revision allows buyers to edit rules and settings on the work order without creating a new one. For example, a buyer can change the cost center or legal entity on a work order by creating a work order revision. Once it's approved and accepted by the supplier, the changes are applied to the work order.

The quick revision feature is another option available to buyers, which allows them to update the work order start and end dates, custom fields, or add comments without creating a full work order revision. Using this method provides a more efficient way of updating information that is most commonly subject to change on a work order.

Users with the *Send for Revision* permission enabled can use the *Send for Revision* action on work orders, which creates a new work item that prompts other buyers to create a work order revision.

When creating a work order revision, you must enter the *Start/Effective Date of Revision* and *End Date* under the New column to indicate when the revision is active on the work order, and when it will end.

Revising Workers

Changes to work orders that require approval, such as changes to worker rates or extending the work order, can be performed using a worker revision.

Context

When revisions are created, a date range is entered that indicates the range of time for which the changes apply. Created revisions to workers are sent for approval and then once approved they must be accepted by the supplier. Confirmed revisions appear on the Revision tab and worker records are updated to show the revision number in the header area.

To create a work order revision:

Procedure

1. Select *Actions* > *Revise*.
2. To make changes to the setup, select *+ Change Setup*. The Change Setup modal displays where you can update the revision owner, business unit, site, and location. Select *Change* to continue revising the worker.
3. If needed, update custom fields.
4. Optionally change the start date for the revision if it's different than the current date. This is the start date that the revision changes will be applicable.
5. Enter an end date to indicate when the revision changes will end. If you're extending the worker, enter the new work order end date.
6. If edits to rates are allowed, you can update the pay rate and the margin percent, if needed.
7. Make any additional desired changes.
8. Select *Continue* to review the revision.
9. Select *Submit* to send the revision for approval.

Results

The revision displays in the Revision tab in Created status. Once the work order revision has been approved and accepted by the supplier, the changes are applied to the work order and the status is changed to Confirmed. The Revision tab is updated to show any changes to the committed spend.

Creating Quick Revisions

Quick revisions can be used to make smaller changes to work orders without having to navigate to more than one screen.

Context

Some of the most common changes made during work order revisions include updating the end dates and editing custom fields. Quick revisions allow you to make these types of changes without filling out all of the required fields in a full revision.

To create a quick revision:

Procedure

1. Select the Actions menu on a work order record, then choose *Quick Revision.*
2. Update any necessary information on the work order. You can also leave comments for other buyers and suppliers associated to the work order.
3. Choose *Submit* once finished.
4. The revision will be sent for approval, and once approved, to the supplier for acceptance. Once approved and accepted, the changes are applied to the work order.

Sending for Revision

The Send for Revision feature allows you to flag a work order for revision by another buyer user.

Context

Buyers with the *Send for Revision* user role permission can use the *Send for Revision* action on work orders and worker records. Using this action generates a work item for cost center owners, job posting coordinators, work order and work order revision owners, and worker supervisors that are associated to the work order.

To flag a work order for revision, navigate to the work order or worker details page, then choose *Actions* > *Send for Revision* and take the following steps:

Procedure

1. If desired, leave any comments in the Send for Revision modal.
2. Choose *Submit* to create a work item that prompts other buyers in the work order approval group to create a revision for it.
3. Once the work order revision is created, the work item is removed.

4.1.2 Closing Workers

Workers are closed when their work order ends, or if they leave an assignment early or don't show up.

Context

You can manually close workers using the *Close Worker* functionality on worker and work order Details pages. Alternatively, you can wait for the SAP Fieldglass application to automatically close worker records after a specified number of days by using the *Auto close worker when end date exceeds (# of days)* configuration.

To change a worker's status to Closed, navigate to the worker or work order Details page and choose the *Actions* menu. Then, choose the *Close Worker* option and take the following steps:

Procedure

1. In the Close Worker modal, select a Reason. If you're using reasons with ratings, choose an appropriate rating for the worker to indicate if they should be hired again.
2. Enter the worker's last day in the *Actual End Date* field. This can be a past, current, or future date. If you enter a past or current date, the *Allow Further Invoicing* field displays.
3. Select *Yes* or *No* for the *Allow Further Invoicing* flag to indicate whether or not further invoices can be created for this work order after it's closed.
4. Select *Close Worker* to complete the action.

Results

The worker is now closed, or will be closed if a future date was entered. If you manually close a worker on the same day as their end date, the SAP Fieldglass application leaves the worker record open until midnight has been reached in the worker's time zone. A *Reopen* button appears on closed workers, and can be used if the worker record needs to be reopened.

Related Information

Invoicing on a Closed Worker [page 61]

4.1.3 Replacing a Worker

Accommodates situations when it’s necessary to close and replace a worker.

Context

When this feature is used, a new job posting is automatically created for the replacement worker. The information from the original job posting is copied to the new job posting. The new job posting is routed to the distribution list from the original job posting. If the original job posting is associated to a project, the new job posting will be automatically associated to the same project. Once the new job posting is created it can be edited and submitted for approval and distribution. When editing the new job posting, the following applies:

- The replacement worker rate can be changed by the buyer, but the total committed spend can’t exceed the approved amount on the original work order.
- For buyers that use Rate Grids, Replacement Job Postings look to the work order of the worker who is being replaced to determine the rate.

> ⓘ Note
>
> A worker who has a work order revision in Pending Approval status can't be replaced until the work order revision is approved.

Company Configuration

Name	Required?	Considerations
Send replacement job posting to all suppliers on distributions	No	Select this option if replacement job postings should go out to all suppliers on the distribution list associated with the job posting. If this option isn’t enabled, replacement job postings only go to the supplier of the worker being replaced and additional suppliers can't be added.
Approval required for worker replacement	No	Select this option if the work orders created for replacement workers need to be approved.
Reason	Yes	A reason is required to close a worker as part of the replace action.

To begin replacing a worker, open the desired worker record and select *Action* > *Replace*. Then follow the steps below.

Procedure

1. In the Replace Worker modal, select a *Reason* for replacing the worker.
2. Enter the actual *End Date* for the worker who is being replaced. If the end date is the current date or a past date, select Yes or No for *Allow Further Invoicing*.
3. Enter comments if desired and then select *Close Worker*. A modal displays indicating that the current worker is closed and the job posting ID for the replacement worker.
4. Select *Edit Job Posting* to make changes to the job posting and submit it for approval. Note that selecting *Cancel* will cancel the worker close and the replacement job posting.

Results

The worker is closed on the specified end date and a new job posting is automatically created for the replacement worker.

4.1.4 Editing Worker Names

Because of life events or an error, a worker's name may require changes.

Context

Change worker information by locating the desired worker and using the *Actions* button on the worker record.

Procedure

1. From the home page, select the *Worker* menu, choose *Worker*, and select a worker ID from the Workers list view.
2. Select *Actions* > *Edit Worker Name*.

   The Edit Worker Name dialogue box displays.
3. Change the name, as needed.
4. Select *Update* to implement the change.

Results

The individual's name is updated everywhere it appears in SAP Fieldglass, including in the worker records.

4.1.5 Editing Work Order Details

Change the worker's job posting owner, business unit, site, or location.

Context

Change worker information by locating the desired worker and using the *Actions* button on the worker's profile.

> ⓘ Note
>
> In order for this action to be available in the Actions menu, the *Worker can be edited without a work order revision* company configuration must be enabled, and the work order must be in Confirmed status.

Procedure

1. From the home page, select the *Worker* menu, choose *Worker*, and select a worker ID from the Workers list view to open the worker record.
2. Select *Actions* > *Edit Work Order Details* (this action is also available from the work order).
   The Edit Details modal opens.
3. Update the fields as needed.
4. To complete the action, select *Update*.

Results

The changes made to Owner, Business Unit, Site, Location, and Work Order custom fields are saved.

4.1.6 Worker Actions

Multiple actions can be taken on worker records to ensure they are accurate and up-to-date.

Available actions are often based on user role permissions and your company's setup. Activity items can be used to manage tasks that need to be completed during a worker's assignment, such as certification requirements, training, and onboarding and offboarding tasks. These tasks can be managed by buyers and suppliers on the Management tab of the worker record. Tasks that are assigned to the worker display on their Home page.

This section includes information on commonly used worker actions that can be performed from worker records and work orders.

Evaluating Workers

Worker evaluations allow a worker's performance to be evaluated. This information can be used during the hiring process for returning workers or to provide feedback to a supplier regarding worker quality.

Evaluation Types

You can create default evaluations tied to activity items or ad hoc evaluations that can be triggered at any time on the worker record.

Setup Process

To create worker evaluations, the following setup process must be used:

- Create questions for the Wizard module. The questions are the evaluation criteria that are used to evaluate the worker. In order to be included in scoring, you must use the Answer Type, User Defined Pick List. While creating user defined picklist options for the question, you provide the score for each answer. Buyers set the scoring values, which can be a number between -9999 and 9999. Other answer types can be used but aren't included in scoring. The Text Area Answer Type can be used to give the evaluator a place to type free-form comments.
- Create a wizard with the starting point *Evaluate Worker*, choose the *Type*, and add the evaluation questions. Valid Types are:
  - *Default* - The wizard needs to be attached to an activity item. The activity item prompts the user to complete the worker evaluation. Multiple Default type wizards can be created.
  - *Ad Hoc* - Buyers can complete the Evaluate Worker wizard anytime by accessing the Evaluate Worker action on the worker record. Once an Ad Hoc Evaluate Worker wizard is created, when a user selects the Evaluate Worker action, the wizard with the questions displays. An Ad Hoc wizard can also be added to an activity item. The application only allows one Ad Hoc Evaluate Worker wizard. Once an Ad Hoc wizard has been created, the Type field no longer displays until the Ad Hoc wizard is deleted.
- Create an activity item with *Evaluate Worker* as the Completion Type unless it's an Ad Hoc type and it should only be accessed from the Evaluate Worker action. In the Wizard field, select the wizard that was created with the evaluation questions. Add the activity item to an activity checklist.

Evaluating the Worker

When the activity item with the wizard is on the worker and a user selects *Evaluate and Complete*, the Evaluate modal opens with the questions. The user evaluates the worker and selects the *Mark as Complete* button.

Scoring

Once the evaluation is completed, the Total Score displays when viewing the activity item. This score is derived by adding together the individual scores for each question on the wizard.

In addition, the Average Evaluation Score displays on worker details and the worker tenure tab. It's blank unless the worker has been evaluated. This score is an average of all worker evaluations, both default and ad hoc.

Example

The buyer is using a five-point scale for scoring. There are three evaluations for a worker - one included on an activity checklist and two ad hoc evaluations. The score on item 1 = 3; the score on item 2 = 2; the score on item 3 = 4. The Total Score is calculated as 3+2+4 = 9. The Average Evaluation Score is calculated as: (3+2+4) ÷ 3 = 3.

Finding Similar People

You can look through your existing workforce and user accounts to find people who have skills similar to a role you're trying to fill.

Context

If your company is configured to use the Organizational Chart feature, the Find Similar People option is available on the worker record. Workers with the same job code as a selected person or record are shown to buyers from the Find Similar People modal. All active employees, temps, profile workers, direct hires, and SOW workers with matching job codes are displayed.

To find similar people, select *Actions* > *Find Similar People*, and then follow the steps below.

Procedure

1. The Find Similar People modal displays a list of similar users. Select a person's name in the list to view their card in the organizational chart.
2. To view the person record, select the *Details* link.

Results

The user's related record opens to the Details tab. If you've opened the organizational chart, you can continue to a user's details by selecting the *Options* link.

Resetting a Password

You can reset a worker's password when a worker is unable to sign in or needs the password changed for security purposes.

Context

If you have permission to reset passwords for other users, you can initiate the reset password action on worker records.

Procedure

1. Select *Actions* > *Reset Password.*
2. Select *Reset* to confirm the action in the Reset Password modal.

Results

An e-mail is sent to the e-mail address on the worker's account. The e-mail includes a link for the worker to reset their password.

Generating Worker Management Records

Worker management records can be generated directly from the worker record.

Context

In some markets, a buyer-defined contract is executed for every worker’s assignment. Among other details, the contract defines the assignment dates and work schedule. Upon request, you can supply a worker management record that outlines the assignment's details and associated time sheets from the worker's record. Worker management records can be generated from the worker record when the Enable Worker Management Record site configuration (for contingent workers) is enabled or the Enable SOW Worker Management Record site configuration (for SOW workers) is enabled and an XSL template is available. When the work order is confirmed, the Generate Management Record action is available on the worker record. This action will generate a new XML that may contain a number of native fields as defined on the XSL template. Custom fields linked to the following modules may also be included:

- Supplier
- Business Unit
- Cost Center
- Site
- Job Posting
- Job Seeker
- Work Order/Work Order Revision
- Company Details
- Time Sheet

> **Note**
>
> A standard upload is available that allows you to generate multiple worker management records and automatically send them to one or more e-mail recipients.

To generate a worker management record, on the worker record select *Actions* > *Generate Management Record*.

Results

A PDF file is automatically downloaded.

Managing Cost Centers

Buyers can manage the cost centers associated to a worker from the worker record.

Prerequisites

Company Configurations

Name	Required?	Considerations
Cost center management on Cost Allocation tab	No	When enabled, this configuration allows users to manage cost centers via the Cost Allocation Tab as well as manage cost centers on work order or work order revision creation. If you only want to manage cost centers from the Cost Allocation tab, this configuration doesn't need to be enabled.
User Access to Cost Centers: Add or Build	Yes	This configuration option controls the cost center access for the user.

User Role Permissions

Name	Required	
Worker - Manage	Yes	This permission is required to access the Cost Center Management option on the worker record.

Context

Cost centers are used to allocate spend for temporary workers and track company budgets. They contain specific budgets, task codes, expense codes, users, and workers. Cost center information propagates to work orders, worker records, time sheets, expense sheets, and invoices.

To manage worker cost center information:

Procedure

1. From the worker record, select *Actions* > *Cost Center Management.* The Cost Allocation tab opens.
2. From the *Assigned Cost Centers* section, select *Add Cost Center*. The Add or Remove Cost Centers modal opens.
3. Under *Search Cost Centers* > *Cost Centers,* select a supervisor from the dropdown menu and select a cost center from the list. Alternatively, you can perform a search for a supervisor or cost center. If you can't find the cost center you're looking for, you should contact your administrator for clarification on the cost center details.

4. Choose *Select & Assign.* The supervisor and cost center display in the *Selected Cost Centers* section.
5. Select *Update*. The cost center and supervisor display in the Assigned Cost Centers list.

Results

View a cost center's details from the Assigned Cost Centers list or perform additional actions on the cost center. You can also choose a cost center in the Assigned Cost Centers tab, then choose the *Set as Primary Cost Center* button on the cost center to designate it as the primary cost center for the worker. The *Primary* field on the cost center is then set to *Yes*.

Associating Users

Managers can provide visibility into a worker record that isn't currently accessible to users by creating an association between the user and the worker record.

Prerequisites

User Role Permissions

Name	Required?	Considerations
Associate User	Yes	This permission must be enabled for the correct module (corresponding to the document) in order to associate to a user.

Context

Users can be associated to various documents by selecting the Associate User option on the Actions menu of a document.

Procedure

1. From the document you want to associate a user to, select *Actions* > *Associate User.*
2. In the *Associate User* modal, select a name from the list using the checkboxes (or perform a search) and choose *Add Selected*.
3. Select *Update*.

Results

You can view associated users by navigating to the *Associated Users* list on the *Related* tab of the document.

Changing a Worker's Profile Picture

Profile pictures can be added to workers by navigating to their worker record and uploading the file to SAP Fieldglass.

Context

This action is only available if the *Allow Profile Picture* configuration is enabled for the worker's site.

To upload or change a worker's profile picture, open the worker's record then follow the steps below:

Procedure

1. Select *Actions* > *Change Profile Picture.*
2. Choose the *Choose File* button to select a file to upload for the worker's profile picture.
3. Choose *Continue* once the file has been uploaded.
4. Choose *Save* to finalize your changes.

Printing a Worker Record

Print the details of various tabs within a worker record.

Using an XSL Template [page 46]
Download and print a worker record as a PDF as per the format of your XSL template.

Using Web Browser [page 46]
Print or download the details of a specific tab within a worker record using your web browser.

Using an XSL Template

Download and print a worker record as a PDF as per the format of your XSL template.

Prerequisites

You have used an appropriate XSL template. For more information, see .

Context

You can download a worker record on your local device in a PDF file according to the format you specified in the XSL template. You can print the PDF as and when you require.

To download a worker record:

Procedure

Within the worker record, choose *Actions* > *Print* from the top right corner of your screen.

Results

The worker record gets downloaded on your local device as a PDF.

Using Web Browser

Print or download the details of a specific tab within a worker record using your web browser.

Context

When you don't need your data as per a specific PDF format, you don't need to use an XSL template. In this case, you can use the print functionality provided by your web browser to print or download a worker record.

Procedure

1. Within the worker record, choose the tab you wish to print.
2. Choose **Ctrl + P** for Windows (**Command-P** for Mac).
3. In the resultant *Print* modal, select the desired print options and print the document or save it as a PDF.

Results

The chosen tab of the worker record prints in the desired format. For printing another tab, repeat the same action for that tab.

Managing Security ID

Buyers have multiple options available to manage the security information provided by suppliers.

The security ID is a pattern of numbers and/or letters to uniquely identify an individual, allowing for more accurate matching with previous and existing job seekers and workers.

When security information is locked, you can unlock the fields to allow suppliers to make necessary changes. If suppliers are required to enter security IDs during work order acceptance, you can use a verification process to ensure the new security ID matches the security ID that was originally provided. Once security information is verified, buyers can validate the security information to permanently lock the fields.

Buyers with the *Manage Security Information* permission enabled can unlock and validate security information. Security information entered for profile workers can't be edited, unlocked, or validated.

Unlocking Security Information

Once a worker registers, their security information is locked. Security ID fields can only be updated by the supplier if the buyer unlocks the fields for editing.

Context

Once unlocked, editing security information varies based on the document or individual. The security information can be edited for:

- A profile worker's record
- A job seeker record

  This option is available for job seekers in the Submitted, Shortlisted, and Interviewed statuses. Suppliers can edit job seekers to change previously entered security information for job seekers or to enter the information if the *Security Information is required to: Create Work Order* company configuration option is enabled.

- Work orders in Created or Activated status.

  Security information cannot be edited on work orders with a status of Accepted until the buyer activates the work order. Once the worker is registered and the work order status is Confirmed, security information is locked and can no longer be edited on the work order. If the *Auto Engage Job Seeker* and *Auto Register Job Seeker* options on the job posting template are enabled, the work order is automatically be confirmed and the security information is locked.
- Worker records (Security ID or security information custom fields).

  This option is available if edits are necessary after worker registration. The buyer must first unlock the security information and the supplier must edit it on the worker record.

Select *View* > *Worker*, search for the worker you want to view, and select the worker’s ID. Change a worker's security information:

Procedure

1. On the worker’s record, select *Actions* > *Unlock Security Information*.
2. A confirmation modal displaying 'Unlocking the Security Information will allow Supplier to make changes to it.' Choose *OK*.
3. In the worker's record, edit the security information (the security information varies based on the document or individual).

   Once unlocked, the Security ID field cannot be locked again and multiple edits can be made. The supplier can now edit the security information by navigating to the appropriate record and selecting the options from the Actions menu.

Validating Security Information

Once security information is reviewed, the buyer has the option to validate the Security ID fields. The validation permanently locks the fields so that they can no longer be changed.

Context

The buyer has the option to validate a worker's security information to prevent any future changes. This functionality can be used to indicate that the worker's security credentials are checked and they match the information provided by the supplier. Only users with the *View and Report on Sensitive Data* user profile feature option enabled can validate security information. Select *View* > *Worker* and select the worker’s ID.

1. To validate security information, select *Actions* > *Validate Security Information* on the worker record.

   A modal displays 'Once you validate the Security Information, no changes can be made to it. Click OK to continue.'

2. Select *OK*.

   After the security information is validated, it cannot be undone.

4.2 Managing Worker Absences

SAP Fieldglass provides tools that allow you to track and manage your workers' absences, providing greater visibility into your company's external workforce management.

Often, buyers need to keep track of worker absences in order to manage their project timelines effectively. Options can be enabled to allow workers to record future and/or past absences for which they won't be onsite or available for work, as well as notify buyers when absences occur. Managing worker absences provides accountability and accuracy in time tracking and reporting for planning and resourcing.

Available options also allow you to enable suppliers to submit absences on behalf of their managed workers. Absences can be submitted and tracked for contingent workers and SOW workers. Worker absence information is available in the Absence list view, in the reporting tool, and on worker time sheets. Submitted absences that aren't necessary or weren't recorded correctly can be removed by buyers and suppliers.

The Absence Details page provides a structured, role-based view of absence information through multiple tabs. The *Details* tab displays absence information along with associated time sheet details for the absence period, the *Approval / Audit Trail* tab provides visibility into approval information and audit history, and the *Related* tab shows worker details, associated work orders, and related time sheets. Access to these tabs is controlled by user role to ensure appropriate visibility and actions.

To use the worker absence functionality, time sheet tracking must be enabled for workers and the rule, *Allow workers to submit Time Sheets*, must be enabled for job postings and statements of work. To improve absence tracking, you can also configure messages to notify the appropriate users when absences are submitted.

To allow workers and/or suppliers to submit absences, enable the appropriate worker absence template rules.

Job Posting Template:

- Worker can submit absence
- Supplier can submit absence

SOW Template: Can Supplier or Worker submit absences

- Supplier
- Worker

To set up buyer notifications for absences, enable the appropriate messages for the Absence module.

4.2.1 Working with Submitted Absences

Absences that are submitted by workers and/or suppliers can be viewed, removed, and included in reports.

Reasons must be defined for the Absence module as they are required to submit and remove absences.

Suppliers and workers can submit full-day absences as well as partial-day absences to account for early departures and late arrivals. Past and future absences can also be recorded as long as the absence start and end dates fall within the worker start and end dates.

Multiple partial-day absences can be recorded for the same day to account for several durations of absence throughout a day. Multiple full-day absences can't be submitted for the same day. If there's already a submitted absence recorded for the worker on the date entered, an error message displays for any additional submissions.

- Workers can submit absences by selecting *Create* > *Absence*.
- Suppliers can submit absences from a worker record by selecting *Create Absences* from the *Actions* menu.

The *Start Date* and *Specify End Date* fields for the worker's absence are required. If the worker will be absent for one day or a partial day, the start and end dates must be the same. If an absence has already been recorded for this worker and date, an error message is displayed. Workers and suppliers must select a reason for the absence.

Absence Notifications and Work Items

If the appropriate messages are enabled for the Absence module, you'll receive a notification when an absence is submitted. Buyer notifications include the details of the absence.

The Absence module supports configurable approval workflows by allowing approval rules to be mapped to approval groups, ensuring absences that meet defined criteria are routed for approval while others follow the default workflow. Built-in notifications and work items keep buyers, suppliers, and workers informed and prompted to take action at key workflow stages such as submission, approval, rejection, and approver assignment. Absences are either auto-approved or routed to Pending Approval based on configuration, with approvals and rejections updating status and triggering notifications.

Absence approvals operate independently of time sheet approvals, ensuring time sheet processing is not blocked by pending absences.

Viewing Worker Absences

Buyers and suppliers can view all submitted worker absences on the Absences List page, or an individual worker's accumulated absences on the Details tab in the Accumulated Absence section of worker records or time sheets. Workers can view only their submitted absences for the specified date range on the Absence List page.

You can also see the absence details on the Absence Details page.

When a worker creates a time sheet that includes a day in which an absence is logged, that day displays with a purple background on the time sheet. This alerts the worker that an absence was recorded, but doesn't prevent the worker from entering time on that day.

Removing Worker Absences

Buyers and suppliers with the user role permission *Worker: Manage Worker Absences* have access to a *Remove* link on the Absence List page and the Accumulated Absences list. Absences can be removed at any time, even after the end date of the absence, by selecting the *Remove* link and selecting a reason.

> ⓘ Note
>
> Workers can't remove absences.

4.2.2 Managing Absences on Time Sheets

Absences are visible when viewing and approving time sheets.

If a time sheet includes hours on a day in which an absence was logged:

- When a worker submits the time sheet, a warning message displays reminding the worker of the absence.
- When a buyer approves a time sheet using Enhanced Time Sheet Approval, the time sheet submitted with time on days containing absences displays on the With Warnings tab with a warning message.

When a worker submits a time sheet with hours on a day in which an absence is logged, a warning message displays. The message displays regardless of whether the absence was a full day or half day, and regardless of the number of hours included on the time sheet. If the hours entered are correct, the worker can select *Submit* again and the time sheet is submitted.

> ⓘ Note
>
> This feature doesn't restrict the ability of the worker to record time on the day of the absence or for the time sheet to be approved.

Escalation Messages

The application delays triggering time sheet escalation messages to the worker's supervisor if the current date is within the absence period for a worker. The messages are delayed until two days after the end of the absence period. If the worker returns from the absence and takes action on the time sheets before the end of the grace period, the escalation messages aren't sent.

Approving Time Sheets with Absences

When a buyer approves time sheets using the Enhanced Time Sheet Work Item view, time sheets submitted with time included on days containing absences displays a warning message on the Warnings tab.

4.3 Cost Center Effective Dating

Some workers may be required to use different cost centers through the course of the assignment, and these cost centers may only be applicable for certain durations.

When workers require the use of different cost centers on different dates, Cost Center Effective Dating ensures that workers enter their time and expenses against the correct cost centers.

When the *Capture effective dates for cost center on contingent workers* configuration is enabled, effective dates for cost centers are captured on contingent workers when the company manages cost centers directly on the worker or via work order revisions. Workers will only be able to enter time or expenses against cost centers that are valid for the date for which time or expenses are being entered.

When this configuration option is first enabled, each contingent worker’s current cost centers are assigned start and end dates that are equal to the worker’s start and end dates.

- In companies with the configuration *Cost center management during contingent work order/revision creation* disabled, the worker's cost centers pick up the worker's new end date when a work order revision is accepted.
- In companies with the configuration *Extend dates without a revision* enabled, the worker's cost centers pick up the worker's new end date when the worker's end date is extended.

Cost center effective dating can be used when cost centers track their own start and end dates. For more information, see .

> ⓘ Note
>
> The **Capture effective dates for cost center on contingent workers** configuration can't be enabled when the **Work order change requests** configuration option is enabled.
>
> In addition, the **Capture effective dates for cost center on contingent workers** configuration can't be enabled when the **Workers have access to all cost centers and task codes from applicable associations** configuration option is enabled.

4.3.1 Cost Center Effective Dating Usage

When the *Capture effective dates for cost center on contingent workers* configuration is enabled, SAP Fieldglass captures or updates cost center start dates and end dates when users take any of the following actions:

- Create a Worker
- Revise a Work Order
- GLA Agent Applies Cost Center Changes to a Worker
- Add or Remove Cost Centers on a Worker
- Unassign Cost Centers on a Worker
- Edit Worker Dates

> ⓘ Note
>
> It is recommended for buyers to not make frequent changes to cost center start and end dates on workers, as SAP Fieldglass uses only the most recent update to cost center start and end dates when it reviews cost centers for availability. It is not possible to set up multiple date ranges when a single cost center is valid.

View a Worker

When the *Capture effective dates for cost center on contingent workers* configuration is enabled, Start and End columns are displayed on the Worker Cost Allocation tab. These columns display each cost center's start and end dates. Each cost center assigned to the worker only tracks the most recent set of dates. Previous changes are not tracked or referenced.

You can report on start and end date for workers' cost centers.

Create a Worker

When a worker is created and the *Capture effective dates for cost center on contingent workers* configuration is enabled, cost center start and end dates are captured.

- Each cost center start date is set to the work order's start date.
- Each cost center end date is set to the work order's end date.

Revise a Work Order

When a buyer user revises a work order, the user may have the option of adding or removing cost centers.

The table below describes how cost center start dates and end dates are revised when the *Capture effective dates for cost center on contingent workers* configuration is enabled and cost centers are added or removed as part of a work order revision.

<table>
<thead>
<tr><th>When these configurations are set...</th><th>And a Cost Center is...</th><th>The Cost Center Start Date is...</th><th>The Cost Center End Date is...</th></tr>
</thead>
<tbody>
<tr><td rowspan="3">Allow manage Cost Center on creation of Work Order and Work Order Revision only for Contingent Worker is enabled and GLA allocation can be done on work orders is disabled</td><td>Maintained on the work order</td><td>Not changed</td><td>Set to the worker's End Date</td></tr>
<tr><td>Added</td><td>Set to the Work Order Revision Start Date</td><td>Set to the worker's End Date</td></tr>
<tr><td>Removed</td><td>Not changed</td><td>Set to one date prior to the Work Order Revision Start Date</td></tr>
<tr><td rowspan="3">Allow manage Cost Center on creation of Work Order and Work Order Revision only for Contingent Worker is disabled and GLA allocation can be done on work orders is disabled</td><td>Not changed</td><td>Not changed</td><td>Set to the worker's End Date</td></tr>
<tr><td>Not changed</td><td>Not changed</td><td>Set to the worker's End Date</td></tr>
<tr><td>Not changed</td><td>Not changed</td><td>Set to the worker's End Date</td></tr>
</tbody>
</table>

For example: A work order revision is created to start on July 31, 2016. The revision adds a new cost center, *Accounting*, to the work order but removes an existing cost center, *Maintenance*. Once the revision is accepted, *Accounting* cost center will have a start date of July 31, 2016, and *Maintenance* cost center will have an end date of July 30, 2016.

GLA Agent Applies Cost Center Changes to a Worker

When the GLA agent applies cost center changes to a worker and the *Capture effective dates for cost center on contingent workers* configuration is enabled, cost center start and end dates are revised as indicated in the table below.

When this configuration is set...	And a Cost Center is...	The Cost Center Start Date is...	The Cost Center End Date is...
GLA allocation can be done on work orders is **enabled**	Maintained on the work order	Not changed	Set to the worker's End Date
	Added	Set to the Work Order Revision Start Date	Set to the worker's End Date
	Removed	Not changed	Set to one date prior to the Work Order Revision Start Date

> Note
>
> The dates are tracked at the Cost Center level and not at the GLA level.

Add or Remove Cost Centers on a Worker

The table below describes how cost center start dates and end dates are revised as a part of adding or removing a cost center on a worker when the *Capture effective dates for cost center on contingent workers* configuration is enabled.

When these configurations are set...	And a Cost Center is...	The Cost Center Start Date is...	The Cost Center End Date is...
Allow manage Cost Center on creation of Work Order and Work Order Revision only for Contingent Worker is *disabled*	No changes are made to a cost center, or changes are made to Supervisor only	Not changed	Not changed
	Added	Entered by the buyer	Set to the worker's End Date
	Removed	Not changed	Set to one date prior to the date the cost center was removed

Unassign Cost Centers on a Worker

Buyer users may have the option of unassigning cost centers on a worker. When a buyer unassigns cost centers on a worker record and the *Capture effective dates for cost center on contingent workers* configuration is enabled, cost center start and end dates are revised as indicated in the table below.

When the Cost Center is...	The Cost Center Start Date is...	The Cost Center End Date is...
Unassigned	Not changed	Entered by the buyer

Submitting Time Sheets

When the *Capture effective dates for cost center on contingent workers configuration* is enabled, and a user selects task codes for a contingent time sheet, the user views only those task code-cost center combinations where the cost center is valid for at least one date on the time sheet.

When a user selects *Complete Later*, *Submit*, or *Enter Additional Rates and Absences* (this option is available for rate schedule time sheets), an error message is displayed if time has been entered against a task code-cost center combination that isn't valid for a particular date.

When a time sheet is edited, cost center effective dates may have changed since the time sheet was last edited. The editor may be able to use new cost centers, or may be required to remove time that was previously entered against cost centers that have now ended.

Submitting Expense Sheets

When the *Capture effective dates for cost center on contingent workers* configuration is enabled, and a user creates a contingent expense sheet, the user views all expense codes for the worker, regardless of the cost center's effective dates. This functionality allows the user to submit expenses that were incurred under older cost centers.

Because the dates on an expense sheet aren't known until the expense sheet is submitted, each expense code-cost center combination is validated against the cost center's effective dates using the date entered for each expense code. When the user chooses *Submit* or *Complete Later*, an error message is displayed if an expense has been entered against an expense code-cost center combination for a date when the cost center isn't valid.

When an expense sheet is edited, cost center effective dates may have changed since the expense sheet was last edited. The editor may be able to use new cost centers, or may be required to remove entries for expense code-cost center combinations that are no longer valid for a particular date.

5 Managing Time and Expenses

You can view and manage worker time and expenses using the SAP Fieldglass application.

When a worker has started an assignment, the worker can enter and submit time sheets and expense sheets for review and approval.

Time sheets are required to track and bill the number of hours spent by the worker on different tasks. These tasks are generated using the task codes created by the buyer. Task codes are set up by buyer administrators from the Admin menu under *Financial Data* > *Task Code*, where they are defined and associated to one or more cost centers. When a cost center is assigned to a worker's work order, the task codes linked to that cost center become available for the worker to select when entering time on their time sheet. For full setup instructions, see Task Codes in the Administration Fundamentals guide.

Time sheets are generated based on a worker's work schedule and time sheet frequency (weekly, daily, monthly, etc.).

Expense sheets are required for reporting expenses for reimbursement. If a buyer has authorized a worker's account for expenses, they can bill expenses for travel or other items by submitting an expense sheet. These expenses are generated using the expense codes created by the buyer.

Task codes and expense codes are either billable or nonbillable. When time or expenses are entered under a nonbillable task code, the worker's employer isn't charged for it.

The SAP Fieldglass application simplifies key tasks for managing time and expenses such as:

- Viewing time and expense sheets.
- Approving and rejecting time and expense sheets.
- Working with reversed and revised time sheets.
- Invoicing time and expenses.

5.1 Viewing Time Sheets

You can view a worker's time sheets by navigating to the Time Sheet list view page.

Context

When you first navigate to the Time Sheets list view page, only time sheets in a *Pending Approval* or *Invoiced* status are displayed for the time period specified. Time sheets in Draft status aren't listed in the default view. Once a time sheet has been submitted, approved, and invoiced, the time sheet can't be rejected or adjusted. However, if an error is found, a revised time sheet can be created to adjust previously submitted hours. Once it has been approved by the worker's supervisor, a time sheet is ready for invoicing. Depending on the buyer's configuration, invoices are either created automatically or must be manually created by the supplier.

You must be in an Owner, Creator, Distributor, Coordinator, or Supervisor role for the job posting or worker record to view the associated time sheets.

To view a list of Pending Approval or Invoiced time sheets:

Procedure

1. From the home page, choose the *Worker* menu and select *Time Sheet*. The Time Sheet list view displays all time sheets in Pending Approval or Invoiced status for the time period specified in the *Period* fields.
2. Select the time sheet ID link for the time sheet you want to view.
3. Review the tasks that hours have been allocated against, along with the total billable and nonbillable amounts.
4. Choose the Related tab to view any related documents in the system, such as the job posting, work order, or invoice.
5. Choosing the Revisions tab to view all approved revisions for that the time sheet, as well as the revision number, status, and reference IDs. Additional key details about the revised time sheet are also shown on this page, such as the reason for the revision and the submit date.

5.2 Viewing Expense Sheets

You can view a worker's expense sheets by navigating to the Expense Sheet list view page.

Context

The Expense Sheet list view displays all expense sheets for the time period specified in the *Period* fields. A unique status is assigned to each step in the document's life cycle. The status of each expense sheet changes as the document moves through the workflow. Once it has been approved by the worker's supervisor, the expense sheet is processed for payment by the buyer.

To view a list of all expense sheets:

Procedure

1. Choose the *Worker* menu and select *Expense sheet*. The Expense Sheet list view displays all expense sheets for the time period specified in the *Period* fields.
2. Select the expense sheet ID link for the expense sheet you want to view.
3. Choose the Related tab to view any related documents in the system, such as the job posting, work order, or invoice.

5.3 Processing Time and Expense Sheets

Worker time and expense sheets can be approved or rejected and revised as necessary.

Approving and Rejecting Time and Expense Sheets

Time and expense sheets can be approved or rejected by buyer users from the Work Items list or from the Time Sheets or Expense Sheets list views.

Approval groups can be used when approving time and expense sheets.

To approve or reject time and expense sheets from the Work Items list, select the Work Items icon and choose *Approve* or *Reject* in the Time Sheet or Expense Sheet section.

To approve or reject time and expense sheets from the list views, select View Time Sheet or View Expense Sheet, select the desired item from the list view, then choose *Approve* or *Reject*.

Reasons are required to reject time and expense sheets. If rejected, they can be edited and resubmitted for approval.

After time and expense sheets are submitted and approved, invoices are created and submitted to the buyer for approval. If necessary, workers and suppliers can revise time sheets that have been invoiced.

Revising Time Sheets

The Revised Time Sheet feature provides a simplified method to correct errors on time sheets that have been approved and invoiced. You can add, remove, or edit all hours or units, as well as make other changes such as adding task codes or reallocating time. By creating a revised time sheet with the correct information, the necessary adjustments (debits or credits) are calculated and applied by the SAP Fieldglass application. Additionally, revised time sheets can be used to quickly process retroactive rate changes. Based on the company configuration options selected, revised time sheets can be entered by contingent workers, SOW workers, and suppliers.

When completing a time sheet revision, you must specify a reason for the revision. Reason codes for revising time sheets must be created by the buyer before a worker or supplier can complete a revision.

When a revised time sheet is submitted, two time sheets are created: the revised time sheet that has all of the corrected data, and a reverse time sheet that backs out all of the entries in the original time sheet. The revised time sheet goes through the same approval process as the original time sheet. The reverse time sheet doesn't need approval, as it inherits the status of the revised time sheet.

When the supplier invoices the revised time sheet, the reverse time sheet is automatically included on the invoice. When the invoice is processed, the reverse time sheet backs out the effects of the original time sheet, and the revised time sheet charges for the hours worked in the time period. Reverse and revised time sheets, although separate, always travel together and can be referenced from their respective Related tabs.

There are several advantages to using the revised time sheet feature:

- A revised time sheet reflects the actual data that should have been originally entered, and not the differences. Previous revisions or changes to a time sheet don't need to be accounted for; the user simply enters the correct information, such as total hours. For example, if a worker worked 8 hours in a day, but entered 6 on their time sheet, 8 hours should be entered on the revised time sheet. If it's later discovered that worker did in fact work 6 hours, a new revised time sheet would be created and 6 hours would be entered.
- Revised time sheets can be submitted by a worker and don't have to be created by the supplier.
- Revised time sheets use the same approval group as the original time sheet.
- Retroactive rate changes can be easily applied to previously invoiced time sheets.
- If the incorrect cost allocation was used for a time sheet, a worker could create a revised time sheet to correct the allocation. The worker correction eliminates the need to contact the supplier, who may not know the correct allocation information.

5.4 Managing Invoices

After time and expense sheets are submitted and approved, invoices are created and submitted to the buyer for approval.

On the supplier record, buyer companies can configure SAP Fieldglass to support supplier invoicing in one of two ways:

- *Auto Invoicing On:* When auto invoicing is turned on, approved time and expense sheets automatically generate an invoice. No additional steps are required by the supplier.
- *Auto Invoicing Off:* When auto invoicing is turned off, the supplier is responsible for creating and submitting invoices to the buyer for processing. Invoices can be created for time sheets and expense sheets that are in Approved status.

Buyers can elect to turn on auto invoicing for time sheets only, expense sheets only, or both. When auto invoicing is turned on, a unique invoice is created for each individual time sheet and expense sheet. To simplify invoice processing, buyers can elect to create consolidated invoices. Consolidated invoices combine individual invoices based on buyer-defined criteria.

If auto invoicing is turned off, buyers can still elect to consolidate supplier-submitted invoices to streamline payment processing.

> ⓘ Note
>
> The SAP Fieldglass application collects and processes the data related to an invoice. This data is sent to the buyer's Accounts Payable system for processing and payment.

5.4.1 Viewing Invoices

You can view invoices in any status after they have been created using the Invoices list view page.

Context

Additionally, you can use the filters on this page to search for invoices based on criteria such as the supplier the invoice is associated to or the date it was submitted. When Auto Invoicing is turned on, or after suppliers have created and submitted an invoice, you can view the status of the invoice on the Invoice List.

Procedure

1. From the home page, select the *Payments* menu and choose *Invoice*.
2. Use the filter options to locate the invoices you want to view.
3. To change the date range of invoices displayed, enter the range of dates to view and select the *Apply Filters* button.
4. Select the time sheet ID link for the invoice you want to view.
5. Choose the Related tab to view any related documents in the system, such as the job posting or work order.

5.4.2 Buyer-Created Miscellaneous Invoices

Miscellaneous invoices can be used for any additional preapproved costs beyond hours worked or preapproved expenses.

Context

Buyers can create miscellaneous invoices when the company uses rate schedules and the **Allow Buyer to Create Miscellaneous Invoices** company config is enabled. Buyers can create miscellaneous invoices to correct or update rate schedule time sheets only.

All miscellaneous invoices are associated to a worker. When creating a miscellaneous invoice, you must first select the related worker.

Procedure

1. Choose the Create menu and select *Miscellaneous Invoice* in the Payments section. The Create Miscellaneous Invoice page displays a list of workers who are available for you to submit miscellaneous invoices against.
2. Choose the worker ID that is related to the miscellaneous invoice you're creating.
3. Enter a unique code in the *Miscellaneous Invoice Code* field. This code is used to identify this miscellaneous invoice.
4. Select a *Miscellaneous Reason* code and enter the associated *Amount*. Miscellaneous Reason codes are defined by the buyer.
5. Select an *Adjustment* code, if applicable, and enter the associated *Amount*. Adjustments are typically any tax items associated with this invoice.
6. Add additional information in the *Comments* field in the General Information section, if applicable.
7. Choose *Add Attachments* in the Attachments section to attach supporting documents for the incurred costs, if desired.
8. When all required fields are complete, choose *Continue*.
9. Review the summary and choose *Submit* when finished.

   The miscellaneous invoice is routed for approval.

5.4.3 Invoicing on a Closed Worker

To provide you with options for controlling spend and invoicing, the Allow Further Invoicing flag option allows you to determine if additional invoices are allowed after the worker is closed.

When a worker is closed in SAP Fieldglass, the actions that can be completed, such as revisions or edits, are limited. Additionally, when you have integrations in place, closing a document can have downstream impacts to other systems. For example, closing a worker in SAP Fieldglass may close a related purchase order in an ERP system, which in turn may block the payment of invoices.

To provide you with options for controlling spend and invoicing, the Allow Further Invoicing flag displays when closing a worker. This option allows you to determine if additional invoices will be allowed after the worker is closed.

Allow Further Invoicing Flag

When a user closes a contingent worker and the *Actual End Date* is a current or past date, the Allow Further Invoicing flag displays.

Setting Flag to Yes

This flag defaults to *Yes*, which allows approvals to continue to be approved. When the *Allow Further Invoicing* flag is set to *Yes* and you want to change the flag to *No* at a later time, the Notify to Managing Invoicing message in the Worker module can be enabled. This sends a notification and creates a work item prompting the recipient to use the *Manage Invoicing* action on the worker to change the flag from *Yes* to *No*. Users in roles with Worker Manage permission are able to change the flag from *Yes* to *No*.

> **Note**
>
> When a user closes a contingent worker and the *Actual End Date* is a future date, the *Allow Further Invoicing* field doesn't display but is automatically set to *Yes*. Additionally, when you have the company configuration, *Auto close worker when end date exceeds (# of days)*, and the worker is auto closed, the field is automatically set to *Yes*.

Setting Flag to No

If *No* is selected, a list of items that can't be approved displays. No additional invoices, time sheets, expense sheets, or miscellaneous invoices can be approved.

When the *Allocate Funds Back to the Project* flag is applicable, upon the closing of a work order or worker, unused funds committed to the corresponding work order or worker are immediately transferred back into the available funds remaining for the project.

There are times when it's necessary to change the flag back to *Yes* in order to allow an invoice to be approved. When the flag is set to *No*, only users in roles with Worker Manage Invoicing permission can see the *Manage Invoicing* action on the worker and can change the flag from *No* to *Yes*.

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