



PUBLIC

SAP Fieldglass

Tenure Policy Management

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1 Tenure Policy Overview

This section guides your understanding of the tenure parameters that affect your company and explains how SAP Fieldglass provides a solution for tenure tracking and, if needed, automated rate changes for contingent workers.

The many facets of managing worker tenure can be a challenge for any organization, no matter the size, global reach, or service type. Buyers must adhere to the multiple worker compliance issues to avoid costs and penalties.

Benefits of Using Worker Tenure Policies

Your company must be vigilant of the amount of time that your contingent workers, SOW workers, or other worker types have worked relative to company and jurisdictional limitations. A system that enables you to define and proactively manage tenure policies mitigates risk by providing clarity when the status of a worker must be changed.

Tenure policies establish the amount of time that a worker can serve your organization by defining the total amount of time the individual works, how that time is calculated, when and if gaps are required, and locational restrictions. Additionally, combining tenure policies for contingent workers with automated rate changes can establish when pay modifications occur and supplier fees revise.

1.1 What Are Your Needs?

This topic provides an introduction to the elements you need to consider when planning a worker tenure system that is compliant with corporate, jurisdictional, and contractual agreements.

When you have cost savings initiatives and compliance policies that focus heavily on worker tenure, it needs to be managed. To start planning for a total tenure management solution, consider your needs:

- How do you define tenure for workers?
Tenure is driven by corporate, jurisdictional, and contractual regulations. Those rules must go into effect on the specified date, across existing and future workers.
- What method are you presently using to track worker tenure?
If you track worker tenure manually, and it requires a substantial amount of resources, consider using a tool that automates tenure tracking.
- How do you track different worker types?
Worker types like contingent worker, SOW worker, and profile worker may need to be tracked differently. The system supports rate-related changes only for Contingent Workers.
- Are you tracking tenure across the whole company, certain jurisdictions, or just for a specific type of employees?
There are many variables that affect worker tenure that must be tracked. Workers can be affected by their type, the department they are assigned, their physical location, and the amount of time they are allowed to

work by local and external rules. Your system must have timely indicators, notifications, or warnings about breaching corporate, jurisdictional, and contractual regulations.

- Is legislation affecting existing workers, future workers, or both?
When government regulations dictate the number of days a worker is allowed to work, your system needs know the worker's location, be able to track the status of each worker, and notify you when workers are nearing a required gap time. The system must also be able to perform these functions in multiple jurisdictions with different ordinances.
- Are rate changes based on worker tenure?
When pay rate changes are required based on the amount of time a worker is employed by you or the amount of time that the worker has completed, the rates need to change automatically. You need a method that works across multiple suppliers even if you have different agreements with each supplier.
- Are assignment gaps required?
When the gaps between work assignments are mandated, the system must track when the gaps have to occur and provide guidance on the workers affected.

1.2 Defining Your Requirements

Use this for planning and requirements definition for implementing SAP Fieldglass tenure policies that automate worker time tracking, compliance management, and notifications.

SAP Fieldglass automates worker tenure with tenure policies that establish the amount of time a worker can serve your organization by defining the total amount of time the individual works, how that time is calculated, when and if gaps are required, and locational restrictions. Notifications and warnings are sent as defined by the policies.

To benefit from the capabilities of SAP Fieldglass, decide on the tenure variables that need to be tracked affecting contingent, profile, and SOW workers. Review your existing tenure tracking system and create a formal list of requirements that help plan your use of the tenure function.

Preparing Your Existing Company's Existing Rules and Restrictions

When planning for the SAP Fieldglass tenure management system, you need to know exactly what your company's rules and restrictions are concerning tenure for contingent employees, SOW workers, and profile workers. Whether the tenure policies are based on jurisdictional laws or company guidelines, SAP Fieldglass has the following keys and values to implement the policies:

- Effective Date: When the policy is to start being active.
- Country or Region Code: The county code that can be a part of the policy.
- Site Code: If the policy is affected by site codes, they can also be part of the policy.
- Business Unit Code: If the policy is affected by business unit codes, they can also be part of the policy.
- Legal Entity Code: If the policy is affected by legal entity codes, they can also be part of the policy.
- Category: If the policy is affected by categories, they can also be part of the policy.
- Worker types: Contingent worker, SOW worker, and profile worker.
- Duration Type: Assignment days, assignment months, time worked in hours, days, or months).
- Duration: Number of assignment days or months; time worked in hours, days, or months).
- Period: The time that the worker must complete the duration type of the policy (EXAMPLE: In Germany, a worker must complete the number of work hours within an 18-month period of time).

- Gap: The time between assignments for a worker.
 - Policy Rule: The rule that establishes if the tenure policy is managed with or without a return date, if the number of gap days is declared, and if the tenure is tracked for reasons other than compliance.
- With these values, SAP Fieldglass automates most worker tracking and notifications.

Manual Changes

For companies that consistently negotiate different pay rates with individual workers and custom rates with each supplier or change rates with no set pattern, the negotiated rates need to be entered into SAP Fieldglass manually for the worker and supplier. SAP Fieldglass tenure management still provides comprehensive support for site-centric regulations and company rules. Notices and warnings are sent based on the amount of a worker's completed time compared to set policies.

For companies that change terms with the suppliers outside of the SAP Fieldglass application, like during a monthly or weekly meeting, automation is limited. SAP Fieldglass tenure management does provide support for other regulations and company rules that do not change. Notices and warnings are still provided based on the amount of a worker's completed time compared to set policies.

2 Tenure Setup and Management

This section provides a description of the basic configuring for SAP Fieldglass Tenure Policy Management and maintaining tenure policies.

Recommended Order of Configuration

To implement tenure policy management, the order that the elements are developed is consequential to the configuration of tenure policy management. This section describes a general order as your company's sequence may be different than what is listed:

Note

SAP Fieldglass recommends performing tenure configurations in a test environment before making changes in production.

Tenure Only (First Time)

1. Enable Company Configurations for tenure and consolidated worker.
2. Confirm that the consolidated worker is active.
3. Create custom lookups for policies and add tenure policies manually with the user interface or edit pick list value upload.
4. If needed, create custom lookup for tenure warnings and notifications.
5. If needed, include tenure violations in approval groups
6. Run reports to identify open or closed job seeker and worker population.
7. Update job seekers and workers manually by editing records or by using the Update Tenure Policies on Documents upload. For consolidated workers, the reference ID can be used to update all the worker records within a consolidated worker. For job seekers, use Job Seeker module.

Tenure (Existing): Update Tenure Records

1. Change existing policies, if needed, or remove the policies no longer used. Remove old policies from the custom lookup manually with the user interface or with an edited pick list value upload.
2. Add new tenure policies manually with the user interface or edit pick list value upload.
3. Run reports to identify open or closed job seeker and worker population.
4. Update job seekers and workers manually by editing records or by using the Update Tenure Policies on Documents upload. For consolidated workers, the ref ID can be used to update all the worker records within a consolidated worker. For job seekers, use Job Seeker module.

When implementing policies, warnings, and notifications, the following applies:

- The minimum setup of SAP Fieldglass Tenure Policy Management features depends on if you are just enforcing tenure policies, implementing rates and fees, or a combination. See Related Links when using SAP Fieldglass for enforcing just tenure or rate change matrix.
- When an edit action is completed on a document, the lookup runs and checks the tenure values.
- If a tenure value changes, or a new policy comes into effect, and the alterations are applicable for existing workers, revise the work order to apply the new tenure values (or use the upload to push through records and provide updates).
- If the tenure policy has an effective date defined, any records with end dates before that effective date are excluded during the shortlisting of previous records.

Related Information

[Tenure \[page 9\]](#)

2.1 Company Configurations: Tenure Policy Management

Describes enabling the Company Configurations for the Tenure Policy Management features.

To manage worker tenure policies, enable the Company Configurations:

Field	Description
Tenure policy	Allows you to define tenure policies, view a tenure counter (on applicable records including contingent, SOW worker, profile worker, and consolidated workers), and receive notifications when a worker is approaching or violating tenure limits. Consolidated Worker must also be enabled.
Track tenure by assignment days	Allows you to able to create tenure policies based on assignment days and assignment months. Assignment days are tracked based on calendar days, not the corporate calendar or actual days worked. Assignment months are tracked based on calendar months, not the corporate calendar or actual months worked (Example: if the worker has worked one day in a calendar month, that entire month is counted).
Note When enabled, this configuration cannot be disabled. If necessary, to stop applying tenure based on assignment days or time worked, the buyer can remove the appropriate rows from the Tenure Policy custom lookup.	
Track tenure by time worked	Allows you to able to create tenure policies based on time worked. The system uses time sheets to calculate time. A rule is also available on Task Codes to determine whether to include the task code in tenure.
Suppress tenure warnings and notifications for buyers	Allows you to able to suppress tenure warnings and notifications for selected contingent, statement of work, and profile workers. The Display Tenure Notifications (or custom label) section shows on the form pages for work orders, work order revisions, profile workers, SOW work orders, and SOW work order revisions. Each tenure policy is listed and notifications for each can be set to Yes or No. When a tenure policy notification status is changed, a reason is required for the change. While tenure policy notifications are set to No, warnings and notifications are not sent, but the system is still tracking the tenure. In example, when the Suppress tenure warnings and notifications for buyers company configuration is enabled, the approval rule Tenure Warning flag can be added to trigger when a change is made to the Tenure flag. When selecting fields for an approval rule, the Tenure Warning flag is available for the Work Order, Work Order Revision, SOW Work Order, SOW Work Order Revision, and Profile Worker modules.

Field	Description
Consolidated Worker	The Consolidated Worker feature allows you to view all of a worker's assignments from one record. This feature allows historical workers, profile workers, contingent workers, and SOW workers to be linked in one primary record upon creation of a worker. The Consolidated Worker company configuration can be activated for companies who are also using the Security Information company configuration.
Security Information	This option must be enabled if the buyer requires a Security ID (SID) to uniquely identify workers across assignments and to track worker tenure. Type a security pattern in the text box to the right of the company configuration. Only capital and lower case letters and numbers are allowed. Special characters cannot be used. The security pattern tells the system what type and number of characters is acceptable when the Security ID field is populated. Each character in the range of characters is entered in brackets ([]). For example, if there are six characters in the field, there should be six bracket groups, each representing acceptable values for an individual position in the field. Example: If the security ID is the worker's first name initial, last name initial, and the last four digits of the worker's Social Security number, the correct pattern would be [A-Za-z][A-Za-z][0-9][0-9][0-9][0-9]. [A-Za-z]. The first and second bracket groups indicate that the first and second characters can each be any upper-case or lower-case letter. [0-9]. The third through sixth bracket groups indicate that each of the last four characters can be any single digit. It is critical that the SID pattern a buyer uses is thoroughly considered before it is configured in the application. When the pattern has been configured, it cannot be changed.
Unique ID is masked (value is always stored encrypted) [CM]	When the unique ID is listed or shown, it is masked so that it cannot be read by users without authorization. For additional security, the value is stored encoded.
Combine attributes to create a strong match [CM]	Enable this configuration to create a strong match using a combination of attributes. If the only attribute that matches between a document and the Consolidated Worker is the Security ID or the Unique ID, the match is not considered Strong. Strong matches require one of the following combinations: identical Name + Security ID + Unique ID, identical Security ID + Unique ID, identical Name + Security ID when document has no Unique ID, or identical Name + Unique ID when document has no Security ID.

3 Tenure

Summarizes the Tenure option for tracking contingent, SOW, profile, and historical workers.

Tenure Rules and Setup Overview

Different rules and setup can be used to drive the tenure calculations. To manage worker tenure compliance policies, these features are available:

- Buyer defined tenure policies.
- A tenure counter on applicable records including contingent, SOW worker, profile worker, consolidated workers, and historical workers.
- Tenure management workflows throughout all related contingent, SOW worker, profile worker, and historical worker processes.
- Tenure limit notifications and communications for buyer and supplier users, including on-page alerts and email messages.

After implementing the lookup types Tenure Policy and Policy Tenure Warning & Notifications, these events apply:

- When an edit action is completed on a document, the lookup runs and checks the tenure values.
- If a tenure value changes, or a new policy comes into effect, and the alterations are applicable for existing workers, edit the work order to apply the new tenure values.
- If the tenure policy has an effective date defined, any records with end dates before that effective date are excluded during the shortlisting of previous records. Historical Worker records with matching worker types are included in tenure shortlisting and that the system uses the historical worker's assignment start date as the tenure counter start date.

ⓘ Note

Tenure management tools set notifications and warnings when the tenure policies and thresholds are exceeded. When notifications and warnings are triggered by tenure policy and threshold violations, no functions are restricted or prohibited.

ⓘ Note

If you are using the previous worker tenure custom script feature or tracking tenure using a custom solution, discuss your conversion options with your SAP Fieldglass representative before using the SAP Fieldglass tenure feature.

Example Strategies

This section provides the description and setup of the SAP Fieldglass strategy of tenure that tracks workers, automatically provides notifications and warnings. The system tracks the amount of time that a worker has been assigned to your company and, if configured, automatically sends notifications as policies are triggered.

Example: Compliance with Jurisdictional Regulation

Scenario: The local jurisdiction limits contingent workers to 180 calendar days of work before mandated break-in assignments. The cooling-off period is 30 calendar days.

Solution: SAP Fieldglass Tenure Management, using custom lookups, tracks the accumulated assignment days for the workers at the affected sites and sends notifications and warnings at the prescribed intervals.

Example: Multiple Assignments over a Calendar Year

Scenario: Your contingent workers are on assignments and off assignments at different sites and different departments. Your company policy is that contingent workers cannot work more than 12 consecutive months.

Solution: SAP Fieldglass tracks the accumulated assignment months and sends notifications at prescribed intervals. You are notified when they are approaching the maximum amount of time that they can work for your company.

3.1 Custom Lookup Overview

Tenure policy is used by SAP Fieldglass to define the methods and validate the time-related limitations for workers.

The custom lookup provides the structure and definitions for the variables that the system uses to act on data. With the tenure policy custom lookups, the worker data is compared to the policies and the corresponding actions prescribed by the tenure policies are performed.

Custom Lookups

The setup and configuration of the policies with rules and warnings are administered through two custom lookups:

- Tenure Policy – Parameters set in compliance to local regulations and company procedures. These are the criteria the lookup runs and checks against the tenure values.
- Tenure Warning & Notification – Settings for notifications and messages that inform users about tenure policy violations. These notifications are triggered according to the threshold specified for each policy in the lookup.

📌 Note

Tenure management tools provide notifications and warnings when the tenure policies and thresholds are exceeded. No workflows are prohibited or functions restricted.

3.1.1 Custom Lookup - Tenure Policy

This section describes using a custom lookup to define tenure policies and validate tenure.

Creating the Tenure Policy Lookup

A custom lookup can be created to allow you to set these values for your individual tenure policies and the corresponding warnings and notifications ([Admin Configuration](#) > [Custom Lookup](#) > [New](#)).

During the creation of the Tenure Policy lookup:

- All key columns (except Effective Date) support the value "All".
- When the effective date for a policy is irrelevant, enter the value "1/1/1000".
- Calendar values are used for calculation of days, not the corporate calendar.
- When a value of Duration/GAP/Period is not relevant for a policy, use the value "999999". This six-digit number is treated as a place-holder value and not used in calculations.

Only one tenure policy lookup is allowed per company.

Tenure processing supports business unit and site hierarchy. The hierarchy functionality allows flexible configuration of tenure based on localization down to a work location. The worker tenure policies can have either a child business unit code or the parent business unit code. System logic looks for the child business code entry first and uses it. If there is no child business unit code, then the parent business unit code is used. If there is no child or parent business unit code, then an *all* value is used.

Use the table to configure the lookup of the tenure policy:

Field	Description
Name	Enter a name for this custom lookup. This differentiates the lookup from other lookups and displays in drop-down lists when a custom lookup needs to be selected. The name must be unique, it can't include commas, and can be up to 100 characters.
Lookup Type	Choose the type of custom lookup you want to create. The options available depend on how your company is configured. Select Tenure Policy .
Data Set	This optional field only displays when the company configuration, Data set, is enabled. The data set must be created before it can be selected from this dropdown. When a data set is selected, the data combinations for the lookup come from the data set. For more information about data sets, refer to the topic.
Number of Segments	The number of attributes required for the lookup. This number corresponds to the number of headers that can be defined. If a data set is associated, this number defaults and can't be changed.

Field	Description
Delimiter	The character used in the upload file to separate the values in each column. Available delimiters: • ; (semicolon) • (pipe) • - (dash) • : (colon)
#	The number of the segment and the order in which it displays on the custom lookup. The first segment is the first column on the custom lookup. Values must be uploaded in this order.
Header Type	Select either Key or Value. • Keys are the data elements that drive the lookup. These data elements correspond to information on a document or record in SAP Fieldglass, or to the associated documents or records. This data can be system generated or ad-hoc user-entered data. • Values are the retrievable results or outputs of the lookup. The values are typically derived from the relationship of the keys. These outputs are always provided by the lookup when it's being used. The Keys must be the first segments and the Values are the last segments.
Type	Select the data element for each Key and Value segment of the lookup. The options available depend on the Lookup Type and your company's setup. This column is available when custom fields and user-defined fields can be used as keys in the lookup.

Field	Description
Key	The available Keys for this custom lookup are: • Business Unit Code - Unique identifier of the business unit. • Category - Specify policies per Category Code. • Country/Region Code - Worker location including country/region. • <Custom Field> - Custom Fields for the following modules: Job Posting, Job Seeker, SOW Worker, Worker, Profile Worker. • Custom Field Group - Custom fields for the relevant modules of the tenure policy. • Effective Date - Effective date of a tenure policy • From Worker Type - Specify policies based on the Worker Type of the worker's previous or present assignment. Note When configuring policies for SOW-type Historical Workers, the lookup value must be SOW (not "Statement of Work," which is what displays on the Historical Worker record). The system also uses the Historical Worker's own assignment start date as the tenure counter start date. • Legal Entity Code - Unique identifier of the legal entity. • Site Code - Unique identifier of the site. • SOW Worker Role/Job Posting Template – Specify policies per a specific Job Title from Job Posting Template (Contingent) or SOW Worker Role (Statement of Work). • Supplier Code - Unique identifier of the supplier. • To Worker Type - Specify policies based on the Worker Type of the new assignment the Job Seeker, SOW Worker, Profile Worker, or Historical Worker is being submitted. • Worker Types - Specify policies per Worker Type: Profile, Statement of Work, Contingent, or ALL.

Field	Description												
Value	The available Values for this custom lookup are: - Duration - Tenure duration and task code in assignment dates. - Duration Type - Determines the unit of measure. When configuration Track tenure by assignment days is enabled, use options: Assignment Days or Assignment Months. When configuration Track tenure by time worked is enabled, use options: Task Code Hours, Task Code Days, Task Code Months, or Names of Tenure Policy Rate Rules. - Exclude Worker Types from tenure - Exclude certain worker types from tenure. - Gap - Assignment gap duration in days. - Include gaps in tenure? - Include assignment gaps in worker tenure, yes or no. - Period - Specify the total number of days or months in which a worker must complete the specified Duration. - Policy Name (Required) - Specify a unique name for the Tenure Policy. Each name can only be used once in this lookup. - Policy Rule (Required) - Used to determine if a tenure policy has been violated by comparing various tenure dates and count information to the data in the current records. The options are: <table> <tr> <th colspan="2">Predefined Policy</th></tr> <tr> <th>Name</th><th>Definition</th></tr> <tr> <td>Track tenure with no compliance</td><td>There are no compliance checks or on-page warnings for this policy, and the policy does not</td></tr> <tr> <td>Manage tenure with no return date</td><td>If the end date of the record is past the expected tenure date, the tenure policy has been violated for a period of time, at which point they must be offboarded or hired as a permanent employee.</td></tr> <tr> <td>Manage tenure with return date</td><td>If the end date of the record is past the expected tenure date and/or the record's start/available date, the tenure policy has been violated. This is intended for policies that mandate a worker can only be engaged for a specific period of time before being engaged on a new assignment.</td></tr> <tr> <td>Mandate gap in assignments</td><td>If the start/available date of a record is before the compliant return date, the tenure policy has been violated. If the gap is more than a defined number of days between assignments, no matter the previous assignment's return date.</td></tr> </table> - Reset tenure when the gap is exceeded? - Yes or no.	Predefined Policy		Name	Definition	Track tenure with no compliance	There are no compliance checks or on-page warnings for this policy, and the policy does not	Manage tenure with no return date	If the end date of the record is past the expected tenure date, the tenure policy has been violated for a period of time, at which point they must be offboarded or hired as a permanent employee.	Manage tenure with return date	If the end date of the record is past the expected tenure date and/or the record's start/available date, the tenure policy has been violated. This is intended for policies that mandate a worker can only be engaged for a specific period of time before being engaged on a new assignment.	Mandate gap in assignments	If the start/available date of a record is before the compliant return date, the tenure policy has been violated. If the gap is more than a defined number of days between assignments, no matter the previous assignment's return date.
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Manage tenure with return date	If the end date of the record is past the expected tenure date and/or the record's start/available date, the tenure policy has been violated. This is intended for policies that mandate a worker can only be engaged for a specific period of time before being engaged on a new assignment.												
Mandate gap in assignments	If the start/available date of a record is before the compliant return date, the tenure policy has been violated. If the gap is more than a defined number of days between assignments, no matter the previous assignment's return date.												
Additional Details	This field is available when the Header Type is Key and the Type is a module-specific Custom Field. Select the custom field you want to include in the lookup.												
Lookup Headers	When a custom lookup is used on a document or record and requires key selections to retrieve one or more values, the Lookup Headers are the labels for the fields that display for selection. When the Key is a system field such as Site or Supplier, the Lookup Header is auto-populated with the system field label. When the Key is a custom field or a user-defined field, a value must be entered.												

Tenure policy custom lookups can be uploaded in bulk with connectors.

Related Information

Adding Tenure Policies

After adding a tenure policy lookup, this section describes how to create the individual tenure policies.

Navigate to the tenure policy custom lookup (► [Admin Configuration](#) ► [Custom Lookup](#) ►) and add tenure policies:

1. Select [Edit Pick List](#).

The Edit Pick List page displays.

2. To add individual tenure policies, select [Add Values](#).

Each row is an individual tenure policy.

3. In the green fields, enter the information that corresponds to the header.

In the [Policy Rule](#) field, enter exactly the name of the predefined policy rule that is desired.

In the [Policy Name](#) field, enter a unique name for each policy. This name is required during the Warnings and Notifications configuration and must be unique within the Tenure Policy lookup.

4. Repeat steps 2 and 3 for each individual policy.

To rapidly upload sets of data, use the connectors.

Related Information

[Connectors \[page 18\]](#)

3.1.2 Custom Lookup - Tenure Warning & Notifications

The system uses this custom lookup to display tenure warnings and send tenure messaging.

When the Tenure policy config is enabled, one lookup of this type is allowed per company. When a buyer creates the Tenure Warning & Notifications custom lookup, five segments must be used.

📘 Note

When worker thresholds are set in Custom Lookup - Tenure Warning & Notifications, alerts are sent as specified in the policy duration, max duration reached, tenure exceeded, and other date sensitive thresholds in the lookup row for each policy. However, if similar thresholds are set in Administration Config Workflow of Thresholds - Alert, alert messages are sent on the set date. Similar thresholds are also available under the Threshold - Alert and Threshold - PMO objects, but these objects are not related to the Tenure Policy Management feature.

To avoid duplicate worker alerts that may cause confusion, consider disabling the similar thresholds set in the Administration Config Workflow of Thresholds - Alert. Multiple worker-related alert threshold field definitions trigger alerts similar to the custom lookups.

Use the table to configure the lookup of the warnings and notifications policy:

Field	Description
Name	The name of this warnings and notifications lookup.
Lookup Type	Choose the type of custom lookup you want to create. The options available depend on how your company is configured. Select Tenure Warning & Notifications. Note The only message supported by custom lookup Tenure Warning & Notifications is Worker nearing Tenure Threshold. For more information, see .
Number of Segments	The number of attributes required for the lookup. This number corresponds to the number of headers that can be defined. If a data set is associated, this number defaults and can't be changed.
Delimiter	The character used in the upload file to separate the values in each column. Available delimiters: • ; (semicolon) • (pipe) • - (dash) • : (colon)
#	The number of the segment and the order in which it displays on the custom lookup. The first segment is the first column on the custom lookup, etc. The values must be uploaded in the order of the segments.
Header Type	Select either Key or Value. • Keys are the data elements that drive the lookup. These data elements correspond to information on a document or record in SAP Fieldglass, or to the associated documents or records. This data can be system generated or ad-hoc user-entered data. • Values are the retrievable results or outputs of the lookup. The values are typically derived from the relationship of the keys. These outputs are always provided by the lookup when it's being used. The Keys must be the first segments and the Values are the last segments.
Lookup Header	Select the data element for each Key and Value segment of the lookup. The options available depend on the Lookup Type and your company's setup.
Key	The available Keys for this custom lookup are: • Language - Only languages enabled for your company can be added to the pick list. The language must be listed exactly as it is in your supported languages. For example: English (United States) • Policy Name - The policy name must be entered exactly as it's named in the Tenure Policy lookup.

Field	Description
Value	The available Values for this custom lookup are: - Alert Threshold Type - Available types are Days and Percentage. Use Days, if you want to be alerted based on the number of days before tenure is reached. Use Percentage, if you want to be alerted based on the percentage of tenure reached. - Alert Threshold - Must be a numeric value. The value entered here works with the Alert Threshold Type to determine when you will be notified. For example: To be alerted 15 days before the worker's tenure is reached, enter 15. To receive an alert when a worker has 10% of their tenure remaining, enter 90. The system sends the alert when the worker reaches 90% of their total tenure duration. - On Page Notification - Enter the warning message or notification that should display on documents when the threshold is reached.

After configuring the custom lookup, set up [Messaging](#) and enable the message with a subject [Worker nearing Tenure Threshold](#). The message can be sent to the buyer as well as supplier according to the alert threshold set by you. For more information, see .

Tenure warnings & notifications custom lookups can be uploaded in bulk with connectors.

Related Information

[Connector - Tenure Policies on Documents Upload \[page 21\]](#)

Adding Tenure Warnings & Notifications

After adding a warnings and notifications policy lookup, this section describes how to submit the individual warnings and notifications policies.

Navigate to the Adding Tenure Warnings & Notifications custom lookup (► [Admin Configuration](#) ► [Custom Lookup](#) ►) and Tenure Warnings & Notifications:

1. Select [Edit Pick List](#).

The Edit Pick List page displays.

2. To add individual warnings and notifications, select [Add Values](#).

Each row is an individual warning and notification.

3. In the green fields, enter the information that corresponds to the header.

In the [Policy Name](#) field, enter exactly the unique name of the individual policy created in Tenure Policy. Entering the unique individual tenure policy name links the warning and notification to the policy.

4. Repeat steps 2 and 3 for each individual warning and notification policy.

To rapidly upload sets of data, use the connectors.

Related Information

[Connectors \[page 18\]](#)

3.1.3 Connectors

This section describes the use of connectors for tenure policy uploads and tenure policies on documents uploads.

To reduce or eliminate manually entered tenure policy sets of data, connectors provide a method for rapidly uploading and updating data related to tenure policy management. Administrators can format and upload data as instructed in the SAP Fieldglass Connector Library topics.

Related Information

[Adding Tenure Policies \[page 15\]](#)

[Adding Tenure Warnings & Notifications \[page 17\]](#)

Connector - Pick List Value Upload

This integration uploads pick list values. The complete list uploaded will replace any lists previously uploaded.

Connector Overview

Component	Detail
Company Type	Buyer
	MSP Partner
Version Type	BULK-DELTA-V1.0
	BULK-FULL-V1.0
	API-A-V1.0 - Ariba MDS Integration for master data
Format	CSV
Prerequisites	Company plug-ins must be turned on for Integration – Pick List Value Upload.
	User role permission must be turned on for Upload Data and Download Data.

Component	Detail
Predecessors	Pick List
Related Connectors	Pick List Configuration Upload

File Formatting

Header

Component	Required?	Definition/Use	Notes	Values
Type	Yes	Upload File Type	If you have a custom connector name for a standard connector, you may use the exact same custom name for the Type header; otherwise, you must use the standard name shown in the Value field.	pick_list_value_upload
Number Format	No	Determines the number format to be used in the file.	The valid values are: "#,###9.99 (Example: 1,234,567.99)" "#.###9,99 (Example: 1.234.567,99)" "###'###9.99 (Example: 1'234'567.99)" "# ##9,99 (Example: 1 234 567,99)" If this field is not included in the header the default value will be "#,###9.99 (Example: 1,234,567.99)"	
Date Format	No	Determines the date format to be used in the file.	The valid values are: MM/DD/YYYY DD/MM/YYYY YYYY-MM-DD If this field is not included in the header, the default value will be MM/DD/YYYY.	
Comments	No	Upload Comments	This is a comment field containing notes about the upload file.	

Immediately following the Header section of the upload is one blank line.

Detail

Field Header Name	Data Type	Length	Required?	Value(s)/Format	Description/Use/Field Rules
Modification Type	Char	1	Yes, required for BULK-DELTA, but not used for BULK-FULL.	Valid values are: A D Blank	A = Add listed value D = Delete listed value only If field left blank, upload assumes 'A'.
Pick List Name	Text	100	Yes	Examples: Supplier Payment Method ABCD 12345	Values to populate within the pick list or Segment values are separated by delimiter defined in pick list. The number of segments should be equal to or less than the number of segments defined in the pick list.

Unique Identifier

- *Pick List Name* field

Assumptions/Tips

- Each file may contain values for a single pick list only.
- A pick list has to be created in the system before running the upload. The pick list name has to be put in the first data row. If the name does not match the pick list that exists in the system, the upload will stop and an error message will be sent out.
- Custom Lookup with type as either Fee Library or Fee with SOW Workers, having Custom Field of type pick list, will not allow values for the Custom Field other than those defined in the pick list.
- If the Custom Lookup admin object is defined with a 'Usage' column, and the column value does not exist in the upload, the application will set that value for the row to 'Optional'.
- For Custom Lookup with type Tenure Policy, column 'Gap' for Duration Type = Assignment Months can contain an integer, or the name of a Rate Rule for the Tenure Policy module, or 999999 as a placeholder value that will be ignored in calculations.
- Rates 2.0. Available for contingent worker rates and rate components for supplier distribution when the 'Rates 2.0' configuration is enabled. If on the Job Posting, the setting 'Estimated Spend Values from Lookups' is also enabled, contingent worker rates and rate components for estimated spend are available.
- When uploading pick list value to Personally Identifiable Information (PII) Thresholds custom lookup, Resource must be included as an acceptable value for the module key, with the only acceptable Site Code as [ALL]

Connector - Tenure Policies on Documents Upload

The Tenure Policies on Documents upload is SAP Fieldglass functionality that enables buyers to apply/retrofit tenure policies to their specified worker population.

Connector Overview

Component	Detail
Company Type	Buyer
Version Type	API-A-V1.0
Format	CSV
Prerequisites	Company plug-ins must be turned on for Integration - Tenure Policies on Documents Upload User role permission must be turned on for Upload Data and Download Data
Predecessors	Tenure Policies
Related Connectors	Tenure Policy Upload

File Formatting

Header

Component	Required?	Definition/Use	Notes	Value
Type	Yes	Upload File Type	If you have a custom connector name for a standard connector, you can use the exactly same custom name for the Type header; otherwise, you must use the standard name shown in the Value field.	Tenure Policies on Documents Upload
Transaction	No	Transaction Type	Transaction Type. Valid type names are: True: If any record errors, the entire upload fails. False: Only records in error fail. Remaining records are committed successfully. If this field is not included in the header, the default value is True .	

Component	Required?	Definition/Use	Notes	Value
Language	No	Determines the language to be used for values in the file, such as dropdown lists and radio buttons. Column headers will always default to the upload user's preferred language.	The valid language values are: Chinese (Simplified) Chinese (Traditional) Dutch (Netherlands) English (United Kingdom) English (United States) French (Canada) French (France) German (Germany) Hebrew (Israel) Italian (Italy) Japanese (Japan) Korean (Korea) Mongolian (Mongolia) Polish (Poland) Portuguese (Brazil) Portuguese (European) Russian (Russia) Spanish (Mexico) Swedish (Sweden) If this field is not included in the header, the default value for language is the preferred language setting of the user performing the upload.	
Module	Yes	Determines to which module tenure policies apply.	Valid values are: Job Seeker Consolidated Worker Profile Worker Work Order Worker	
Comments	No	Upload Comments	This is a comment field containing notes about the upload file.	

Detail

Field Header Name	Data Type	Length	Required?	Value(s)/Format	Description/Use/Field Rules
Object ID	Text	16	Yes	Valid SAP Fieldglass object IDs. Examples: SUP1JS00000011 XXXXWM00000012 XXXXPW00000013 XXXXWO00000014 XXXXWK00000015	Indicates documents to be updated with tenure policies.

Unique Identifier

- Module
- Object ID

Assumptions/Tips

- Only one module per upload file can be entered.
- When a document uploaded picks up a new Tenure Policy, 'Display Tenure Notifications' will default to Yes for that policy.

4 Rate Change Matrix

Summarizes the Rate Change Matrix (RCM) option for tracking contingent workers.

Rate Change Matrix Setup Overview

Pay rate and supplier fee rate changes can occur at planned intervals based on the amount of time a contingent worker works for your organization, how that time is calculated, and local regulations.

This section provides the description and setup of the SAP Fieldglass strategy of rate change matrix that tracks workers and automatically makes adjustments according to the specifications of the work order. The rate change matrix is an automated rate change feature that only applies to contingent workers.

A buyer may require a worker's pay rate and / or the resulting bill rate to increase or decrease over the course of a worker's engagement. These rate changes may be due to factors such as local requirements defining a worker's compensation rights or cost savings initiatives. To ensure that rate change policies are adhered, a buyer can predefine the rate change criteria based on the conditions of a worker's assignment. When the Rate Change Type defined on a job posting template is buyer defined, the user creating or editing the template must select the rate change matrix that should apply to the template.

When a buyer defined rate change matrix is included on a job posting template and the template is used to create a job posting, the application automatically applies the rate changes to work orders over time. This removes the need for a user to manually revise the rate.

Example Strategies

Only rate changes assigned in the work order and work order revision are applied. The pay rates for the contingent worker and supplier billing rates change over time, as specified in the work order or work order revision.

Example: Different Pay Rates Depending on Time and Day

Scenario: The work order has a complex rate structure that includes different pay for overtime, holiday, and past midnight. There is a billing rate decrease after 90 days.

Solution: The rate change matrix from the work order enables SAP Fieldglass to automate such a complex set of pay rates based on the number of hours the worker has performed, the day of the week that they are working, and the time of day that they worked. The worker automatically receives the prescribed pay rate amount depending on the amount of hours in the rate change matrix for a day and time of day with standard time, overtime, or double-time. After 90 calendar days, the billing rate automatically decreases, as specified in the work order.

Example: Multiple Assignments over a Calendar Year

Scenario: Your workers are on assignments and off assignments at different sites and different departments throughout the calendar year. Based on the work order, the pay rate for the workers changes when they have

accumulated three working months, and the rates to the supplier decrease when the worker has accumulated assignments of six working months.

Solution: SAP Fieldglass tracks the accumulated assignment months in a calendar year and changes the worker pay rate as entered in the rate change matrix. When the prescribed amount of time has been reached for the supplier rate, SAP Fieldglass automatically changes the rate, as prescribed by the rate change matrix. Using SAP Fieldglass simplifies changing pay and supplier rates based on the amount the time that the worker has performed.

4.1 Configuring the Rate Change Matrix

Describes setting up a buyer defined rate change matrix functionality.

Recommended Order of Configuration

To use SAP Fieldglass to manage worker status by automating changes based on time, the order that the elements are developed is consequential to the rate change matrix. This section describes a general order as your company's sequence may be different than what is listed:

Note

SAP Fieldglass recommends performing rate change matrix configurations in a test environment before making changes in production.

Rate Change Matrix Only

1. Created rate change matrix rules by rate rules team. They are added by the system administrator.
 2. Create rate change matrix custom lookup.
 3. Use Edit Pick List Value upload to populate lookup data.
 4. Create rate change matrix components.
 5. Create rate change matrix administration object.
 6. If needed, use Reports to identify job posting templates that need to be using the rate change matrix.
 7. Use Job Posting Template report data and Job Posting Template to Update upload to add rate change matrices to job posting templates
 8. Run reports to identify open or closed job seeker and worker population.
 9. If custom fields are part of the rate change matrix, then they should be used in the rate change matrix custom lookup or created and added. (The custom fields can added with an upload to the job posting template, job posting, and the identified job seeker or worker population.)
 10. Use the consolidated workers reference IDs from the identified worker population and update their rate change matrix by using the Update Tenure Policies on Documents upload.
 11. Using job posting or job seeker report data, update all open job seeker records with rate change matrix by using the Update Tenure Policies on Documents upload.
 12. Run a report to check if inflight job seekers have been hired without tenure or RCM and update the consolidated worker by using the Update Tenure Policies on Documents upload.
-

When implementing policies, warnings, and notifications, the following applies:

- The minimum setup of SAP Fieldglass Tenure Policy Management features depends on if you are just enforcing tenure policies, implementing rates and fees, or a combination. See Related Links when using SAP Fieldglass for enforcing just tenure or rate change matrix.

- When an edit action is completed on a document, the lookup runs and checks the tenure values.
- If a tenure value changes, or a new policy comes into effect, and the alterations are applicable for existing workers, edit the work order revision to apply the new tenure values (or use the upload to push through records and provide updates).
- If the tenure policy has an effective date defined, any records with end dates before that effective date are excluded during the shortlisting of previous records.

For a buyer to define rate change matrix functionality, the following set-up is required:

- [Rate Change Matrix Custom Lookup](#) - Custom look-ups must be configured to be used on rate change matrix component admin objects and when defining the default components on a rate change matrix admin object. Custom look-ups allow buyers to upload the key values used when retrieving rate change information.
- [Rate Change Matrix Rate Rules](#) - Rate rules must be defined with SAP Fieldglass assistance. Once defined, the rules can be used on rate change matrix component admin objects and when defining the default components on a rate change matrix admin object such as with time sheets and rate change matrices.
- [Rate Change Matrix Component](#) - This admin object allows buyers to configure the buyer defined components that display in a buyer defined rate change matrix, the rate to be calculated, and from where the data is fetched. A custom lookup or a rate rule must be configured to create this admin object. Once the rate change matrix components are created, they are added to the rate change matrix admin object.
- [Rate Change Matrix](#) - This admin object allows buyers to predefine the rate change matrix structure that is used on job postings, job seekers records, work orders/revisions, and worker records that are created from a buyer defined rate change matrix job posting template. Default components are automatically included on a rate change matrix and buyer defined components created with the rate change matrix component admin object are added to rate change matrices.

See Related Links for the steps and descriptions to define rate change matrices.

Related Information

[Rate Change Matrix \[page 24\]](#)

4.1.1 Custom Lookup - Rate Change Matrix

Describes configuring the rate change matrix custom lookup.

When is used, custom lookups must be created to allow buyers to upload the key values used when retrieving rate change information.

Create a custom lookup using the Lookup Type [Rate Change Matrix](#). This type of custom lookup is associated to a rate change matrix component admin object and the default rate change matrix components that are set up on the rate change matrix admin object.

Note

This lookup is not available to customers using the Rates 2.0 structure.

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

Field	Description
Name	Enter a name for this custom lookup. This differentiates the lookup from other lookups and displays in drop-down lists when a custom lookup needs to be selected. The name must be unique, it can't include commas, and can be up to 100 characters.
Lookup Type	Choose the type of custom lookup you want to create. The options available depend on how your company is configured. Select Rate Change Matrix .
Data Set	This optional field only displays when the company configuration, Data set, is enabled. The data set must be created before it can be selected from this dropdown. When a data set is selected, the data combinations for the lookup come from the data set. For more information about data sets, refer to the topic.
Number of Segments	The number of attributes required for the lookup. This number corresponds to the number of headers that can be defined. If a data set is associated, this number defaults and can't be changed.
Delimiter	The character used in the upload file to separate the values in each column. Available delimiters: • ; (semicolon) • (pipe) • - (dash) • : (colon)
#	The number of the segment and the order in which it displays on the custom lookup. The first segment is the first column on the custom lookup. Values must be uploaded in this order.
Type	Select the data element for each Key and Value segment of the lookup. The options available depend on the Lookup Type and your company's setup. This column is available when custom fields and user-defined fields can be used as keys in the lookup.
Key	Available Key options include: • Category • Custom • Custom Field • Rate Category Code/UOM • Rate Tier Sequence • Site Code • Supplier Code • Valid On

Field	Description
Value	Available <i>Value</i> options include: • Number of Units • Rate Tier Sequence • Unit Frequency • User Entered with Data Type Definition
Additional Details	This field is available when the Header Type is <i>Key</i> and the Type is a module-specific Custom Field. Select the custom field you want to include in the lookup.
Lookup Headers	When a custom lookup is used on a document or record and requires key selections to retrieve one or more values, the Lookup Headers are the labels for the fields that display for selection. When the Key is a system field such as Site or Supplier, the Lookup Header is auto-populated with the system field label. When the Key is a custom field or a user-defined field, a value must be entered.

4.1.2 Rate Change Matrix Component (Rates 1.0)

Used to create buyer defined rate change matrices.

The rate change matrix component admin object allows the buyer to define the components, other than the default components, that are included in a buyer defined rate change matrix. A separate object needs to be created for each component that is included on a matrix. Once the components are created, a rate change matrix admin object is created and the components are added to it.

Note

This admin object requires the appropriate data type to be created before creating the component. The data type is either a custom lookup or a rate change matrix rate rule.

Rate Change Matrix Component Field Definitions

Field	Definition
Code	A unique code for the rate change matrix component.
Name	The name for the rate change matrix component.
MSP Company	When MSP is enabled for the company and multiple MSPs exist, general MSP users have the option to select the MSP company applicable to this rate change matrix component. When the user is an MSP user, the field defaults to the user's MSP and is view only.

Field	Definition
Used to Calculate	If this component is to be used to calculate one of the following items, select the item from the list, otherwise choose Not Applicable. • Not Applicable • Pay Rate • Bill Rate (only available for non-MSP companies) • Effective On • Supplier Bill Rate (only available for MSP companies) • MSP Flat Fee
Data Type	This tells the application where to get the information for this component: • Lookup - There is a custom lookup type for the rate change matrix. The lookup must have been created before the component can be created. • Rate Change Matrix Rule - A rule can be created for the rate change matrix module. The rule must have been created with the assistance of SAP Fieldglass before the component can be created.
Visible To Supplier	This determines whether or not the supplier is able to see the component. The default is Yes but can be changed to No. Note If Used to Calculate is MSP Flat Fee, this field defaults to No and cannot be changed.
Editable (Data Type = Lookup)	The Editable flag displays with the default No. If Yes is selected, suppliers are able to change the value defined in the lookup when the job seeker is submitted and buyers are able to change the value defined in the lookup when creating the work order. This field can be edited to change the value after a component is created. If the value is edited, only job seekers, work orders, and work order revisions created after the change are affected.
Select Lookup Name (Data Type = Lookup)	The user selects the lookup that should be used to complete this component.
Select Lookup Segment (Data Type = Lookup)	The user selects the segment of the lookup that should be used to complete this component.
Select Rate Change Matrix Rule (Data Type = Rate Change Matrix Rule)	The user selects the rule that should be used to complete this component.

Default Components

After the rate change matrix is created, five components are established and display on the rate change matrix component list:

- Sequence
- Number of Units
- Unit Frequency

- Rate Category/UOM
- Effective On

5 Tenure and Rate Change Matrix

Summarizes the Tenure and Rate Change Matrix option for automatically tracking workers across records and applying the correct rate.

Tenure and Rate Change Matrix Overview

Combining tenure policies with automated rate changes establishes when pay modifications occur and supplier fees revise. SAP Fieldglass enables you to manage the amount of time contingent workers accumulate and the impact to associated pay rates and fees.

This section provides the description and setup of the SAP Fieldglass strategy of Tenure and Rate Change Matrix that tracks workers, automatically provides notifications, and make rate value adjustments.

Rate changes are due to factors such as local requirements defining compensation rights for a worker or cost savings initiatives. To ensure that rate change policies are adhered to, a buyer can predefine the rate change criteria based on the conditions of the assignment of a worker. When the Rate Change Type defined on a job posting template is buyer defined, the user creating or editing the template must select the rate change matrix that applies to the template.

The combination of tenure policy and rate change matrix can simultaneously link the pay rate, bill rate, and regulatory compliance to the data in the consolidated worker. Buy using tenure and rate change matrix, the buyer can drive rate changes across assignments (example: Cost saving agreements and/or pay rate changes based on a worker's tenure). There can also be additional tenure policies that run in parallel that help the buyer keep the worker in compliance.

The criteria for the rate change can vary from the simple to highly complex. If your company requires a worker's pay rate to increase and the supplier's bill rate to decrease over a period of time because of multiple requirements such as local legislation or cost savings initiatives, the tenure of the worker drives the pay rate changes and the supplier bill rate changes matrix.

When an existing work order's end date is prior to a new work order with a new future rate change matrix's start date, the system will maintain the current rate change matrix start date and any rate change matrix and tenure related information for the open work order or worker.

Example Strategies

The amount of time that a worker performs their assignments affects the pay rates and / or supplier bill rates. The system makes the changes automatically and provides notifications as set in the corresponding tenure policies and rate change matrix.

Example: Tenure Length Drives Pay Rate, Supplier Fees, and Compliance Notifications

Scenario: Due to government regulations, contingent employees that work 180 calendar days must have a break for 30 calendar days before continuing their assignment or starting a new assignment. Pay increases occur every 60 days worked and supplier rates decrease every 90 calendar days.

Solution: SAP Fieldglass applies the tenure functionality to drive the rate change matrix. Tenure is based on the data in the consolidated worker including the number of days the worker has been assigned. The rate change matrix is drawing on calendar days for counting tenure days, including weekends and sick days. By setting tenure, when the number of calendar days approaches 180, SAP Fieldglass automatically provides notifications and warnings that a break must occur for the worker. The system also uses the number of calendar days worked per tenure counter to automatically increase the pay rate and decrease the supplier fees as prescribed by the rate change matrix.

Example: Work Order Drives Rate Change Matrix and Tenure in Parallel

Scenario: You have an individual that has worked on two or more assignments, but the effective date calculations for the rate changes are defined separately per work order. Your company also has tenure policies for compliance that do not affect pay or supplier rate changes but require the worker be off-boarded at six months and not eligible for assignments for a calendar month.

Solution: The settings of Fieldglass SAP are set for the system to count the calendar days in the Worker Master Record. The system uses the count in the Consolidated Worker and checks it against the worker order rate change matrix. The worker's pay rate changes as prescribed in the work order. Tenure notices and warning are sent in parallel as set in the system. Tenure only tracks the limit number of calendar months, then messages you to off board the worker for the prescribed amount of time, and provides a date when you can bring them back.

5.1 Tenure and Rate Change Matrix Configuration

Provides guidance for setting up the tenure compliance policies and confirming the rate change matrix contains the needed data.

This section provides the description and setup of the SAP Fieldglass strategy of Tenure and Rate Change Matrix that tracks workers, automatically provides notifications, and makes adjustments.

Note

When the rate change matrix is defined by the supplier, for example when the Rate Change Type on the job posting template is Percentage or Rate Value, they cannot be used for tracking tenure. Refer to the SAP Fieldglass Rates guide Rate Change Matrix topic.

Prerequisites

- When the [Tenure policy](#) company configuration is enabled and the buyer is using tenure as a source to determine rate change matrix start date or rate change matrix effective on parameters, tenure policies must be added to the SAP Fieldglass system before the buyer can begin using them in the tenure policy custom lookup.

- In order to use tenure to drive a rate change matrix that is effective on a specific date, a new rate rule variable must be set when creating or editing a rate rule for the Rate Change Matrix module.

Recommended Setup Sequence Tenure with Rate Change Matrix

This section provides general guidance for setting tenure and rate change matrix to work together. The recommended order of setting up the elements for worker tenure management:

1. Enable Company Configurations for tenure and consolidated worker.
2. Confirm that the consolidated worker is active.
3. Create the tenure policy custom lookup. [Custom Lookup - Tenure Policy \[page 11\]](#)
4. Set or upload the tenure policies. [Adding Tenure Policies \[page 15\]](#)
5. Create tenure warning and notifications lookup. [Custom Lookup - Tenure Warning & Notifications \[page 15\]](#)
6. Set or upload the tenure warnings and notifications. [Adding Tenure Warnings & Notifications \[page 17\]](#)
7. Add rate change matrices that are defined by tenure policy information.

Related Information

[Company Configurations: Tenure Policy Management \[page 7\]](#)

[Configuring the Rate Change Matrix \[page 25\]](#)

[Custom Lookup Overview \[page 10\]](#)

[Custom Lookup - Tenure Policy \[page 11\]](#)

[Custom Lookup - Tenure Warning & Notifications \[page 15\]](#)

[Tenure and Rate Change Matrix \[page 31\]](#)

6 Using Worker Tenure Management

This section describes and instructs using Worker Tenure Management after configuration.

Depending on the configuration of the tenure management, and the information that is important to you, your experience with worker tenure management will be unique. This section describes the general information that is presented by the worker tenure management system.

Consolidated Worker

The Consolidated Worker feature must be enabled for worker tenure management. It is where the tenure of workers is tracked and includes all of their assignments. This feature allows the time, dates, and other information be linked in one central record upon creation of a worker.

Consolidated workers are not 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 cannot access associated records that they do not have permission to view. For example, they cannot access records associated with sites or business units that they do not have permission to view.

Consolidated Worker Setup

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.

Consolidated Worker Assignments

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

- No match to an existing consolidated worker
- One match that is not 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.)

Viewing Consolidated Workers

When enabled, the consolidated worker is available from the [View](#) menu and 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](#) does not 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.

Updating Consolidated Workers

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.

6.1 Tenure Tab

Describes the Tenure tab on the worker, work order, job seeker, and master worker documents.

The Tenure tab displays the amount of time the worker has spent working for a buyer and the list of tenure policies affecting that worker, the details of the listed policies, the dates the worker is predicted to reach the tenure limit, and the dates the worker can return to work corresponding to the policies. Assignment details are listed and the links to the tenure policies are also provided.

Policy Details

The Policy Details section lists additional descriptions of the policies.

Column	Definition
Name	Title of the tenure policy lookup.
Tenure Date	Expected date when the worker meets the tenure duration limit. When the Duration Type is a Time Worked type, the value displays as a dash until the time worked threshold is met (then the time sheet date when tenure was reached displays).
Tenure Threshold	Displays the tenure to date compared against the tenure threshold. It shows the time duration and the percent (%) of the tenure that has been worked. If the tenure threshold is exceeded, percentage displays as over 100%. If the tenure is based on time worked, this field is populated after the first time sheet is submitted.
Compliant Return Date	Date when worker can return to work. If the Duration Type is any of the Time Worked types, the value displays as a dash until the time worked threshold is reached (then the Compliant Return Date displays).

Tenure Policy Details View

When a row is selected in the Policy Details table, these details are presented:

Column	Definition
Tenure Policy Effective Date	Displays the effective date of the tenure policy.
Tenure Start Date	The tenure policy calculation start date.
Tenure Threshold	This field displays the tenure to date compared against the tenure duration. If the tenure threshold is exceeded, percentage displays as: over 100%. If tenure is based on time worked, this field is populated after the first time sheet is submitted. Details include: • Total Tenure to Date - The total amount of tenure for the worker. The value continues to update even after tenure is exceeded. • Duration Unit Type - Hours, days, weeks, months depending on item. • Duration - Shows the value of the duration. • Percent of Tenure to date - Shows the amount of tenure already used up to 100%.

Assignment Details

The Assignment Details lists the count of items and describes the columns:

Column	Definition
Status	Displays the state of the assignment.
ID	Unique identifier for the posting.
Name	Name of the worker.
Start Date	Beginning date for the posting.
End Date	Completion date for the posting.

6.2 Security Information Feature

Describes the security information feature and how it affects tenure.

The security information feature is vital to track the tenure of workers. It allows job seekers and workers be tracked by a unique identifier in SAP Fieldglass. Identifying a worker by unique security information provides the ability to track the history of a worker across multiple work orders and statements of work, giving visibility to the tenure of a worker. Worker tenure is important when there are company policies or country/region regulations that set limits on how long a person can work in a nonemployee role, or how long a person must be away before returning for additional assignments. The worker tenure feature is used with security information to provide a way to link a worker's past and current assignments for a company, allowing better visibility into a worker's history and tenure.

Security information that is not masked can be viewed on the Details tabs of the corresponding documents. Buyers and suppliers can enter and edit security information on profile workers that they create, however security information cannot be edited on historical worker records.

The security ID can be edited by the supplier at various times throughout the hiring process and the work order creation process. Options to edit are dependent on the company configuration settings of the buyer.

When workers register, they must enter the correct security information to create their accounts in SAP Fieldglass.

Entering Security Information

To keep the tenure data linked to job seekers and workers, the Security ID and Confirm Security ID fields is entered for the following processes:

- Submit Job Seeker
- Add SOW Worker
- Create Profile Worker
- Upload Historical Worker
- Worker Registration

Managing Security Information

Buyers have multiple options available to manage the security information provided by suppliers. After security information is locked, buyers can unlock the fields to allow suppliers to make necessary changes. Once security information is verified, buyers can validate the security information to permanently lock the fields.

6.3 Reporting

This section describes the reporting fields that correspond with tenure and rate change matrix.

Tools are available to help you report on and analyze the data within SAP Fieldglass. These tools are accessed from the Analytics menu. To observe statistics relating to tenure, the Analytics tool can report on data as described in this section.

Tenure Report Fields

Field Name	Definition
Compliant Return Date	Estimated date a worker can return to work within policy compliance.
Policy Name	Policy name defined in the tenure lookup.
Policy Violated?	Policy violated?
Start Date Tenure Policy	When the rate change matrix relies on tenure policy to determine rate change matrix start date, this field returns the tenure policy name.
Tenure Date	When tenure is based on assignment days, this is the estimated date a worker passes the tenure duration limit. When tenure is based on time worked, this is the actual date the worker hit the tenure duration limit.
Tenure Policy Violated?	Tenure policy violated?
Tenure Threshold	Denotes the duration value from the tenure policy.
Tenure Threshold %	Percentage of tenure against the tenure threshold. Value is capped at 100.
Tenure Unit Type	Denotes whether tenure is tracked in hours, days, months, or a custom unit type.
Total Tenure to Date	When tenure is based on assignment days or assignment months, this is the sum of tenure as of the current date. When tenure is based on time worked, this is the sum of time worked on submitted time sheets.

Rate Change Matrix Report Fields

Field Name	Definition
Buyer Bill Rate	Buyer bill rate amount on the effective date.
Effective Date	Date rate change matrix takes effect.
Pay Rate	Pay rate amount on the effective date.
Rate Change Matrix Component	Name of rate change matrix component.
Rate Change Matrix Name	Name of associated rate change matrix.

Field Name	Definition
Rate Change Matrix Sequence	Sequence number on the rate change matrix.
Rate Change Matrix Start Date	Start date of the rate change matrix.
Rate Change Matrix Type	Identifies buyer defined or supplier defined rate change matrix.
Supplier Bill Rate	Supplier bill rate amount on the effective date.

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