SAP Fieldglass

SAP Fieldglass Supplier Administrator Guide

Updated: November 2017

SAP Run Simple

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GUIDE OVERVIEW

This guide was written to provide a basic understanding of how to perform supplier administrator functions for SAP Fieldglass. In it, you will see how to configure the SAP Fieldglass system to suit your organization's needs. This guide focuses on the most commonly used features of the SAP Fieldglass application. The steps documented in this guide serve as a basis for understanding the functionality of the application and may not fully represent the actions required from a supplier for each instance of the SAP Fieldglass application.

Learning Objectives/Agenda

When this training is completed, you should have a better understanding of the SAP Fieldglass application and how it works. You will learn how to perform administrator tasks, such as creating and managing system configuration, company structures, and buyer information.

To accomplish this goal, the following topics will be discussed in detail:

- Introduction to SAP Fieldglass
- The SAP Fieldglass Application
- Navigating the Desktop Page
- Administrator Functions
- User Profiles
- User Roles
- Managing Company Structure Information
- Buyers
- Custom System Configuration and Settings
- Upload Timesheets
- Reports

INTRODUCTION TO SAP FIELDGLASS

SAP Fieldglass became a leader in vendor management systems by developing the first unified technology platform that provides transparency into an organization's entire contingent workforce program and helps companies optimize program performance and make more strategic labor decisions. SAP Fieldglass is the software application used to support an organization's contingent workforce management program.

When an organization implements a contingent workforce management program that uses the SAP Fieldglass application, the suppliers (or vendors) providing workers will be asked to use SAP Fieldglass to submit candidates, accept work orders, and submit time and expenses for invoicing.

Terminology

The following terms may be used in this guide.

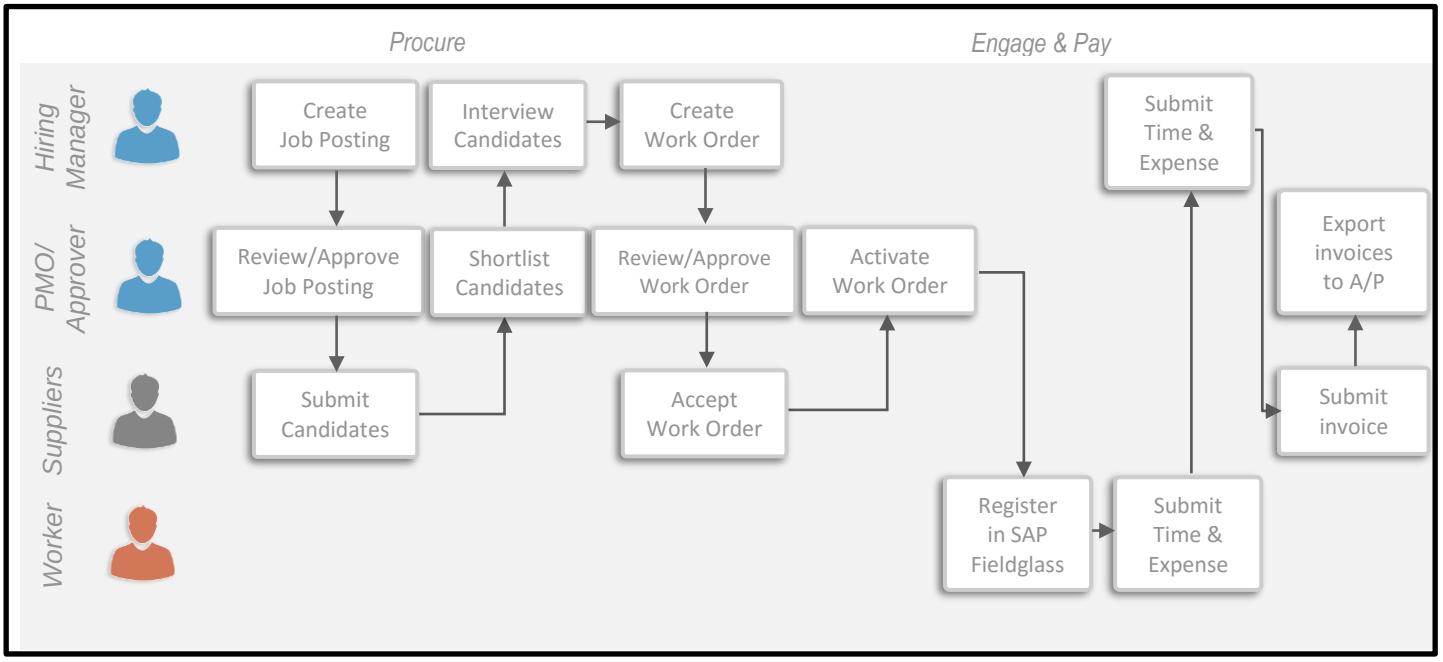
SAP Fieldglass Terminology	
Term	**Definition**
Buyer	The company or organization requesting temporary labor.
Contingent Workforce Management (CWM)	A strategic method of managing an organization's non-permanent workforce to reduce risk and control costs.
Contractor Access Agreement (CAA)	The agreement between SAP Fieldglass, Inc. and an organization that allows the organization's personnel access to the SAP Fieldglass application.
Job Posting	An electronic document created in the SAP Fieldglass application by a buyer organization that requests temporary labor.
Job Seeker	The individual (candidate) submitted to a job posting by a supplier for review and consideration of an open temporary position.
Supplier	The organization providing temporary workers to a buyer.
Supplier Account Manager	The primary contact at the supplier organization who will receive the SAP Fieldglass initial registration email.
Work Order	An electronic document created in the SAP Fieldglass application that outlines the terms, dates, rates, and individual selected for a temporary work assignment.
Work Items	Items in SAP Fieldglass that require action, such as responding to a job posting, accepting a work order, or approving a time sheet.
Workforce	A pool of candidates who are available in the SAP Fieldglass application for submittal to job postings.

SAP FIELDGLASS STANDARD PROCESS FLOWS

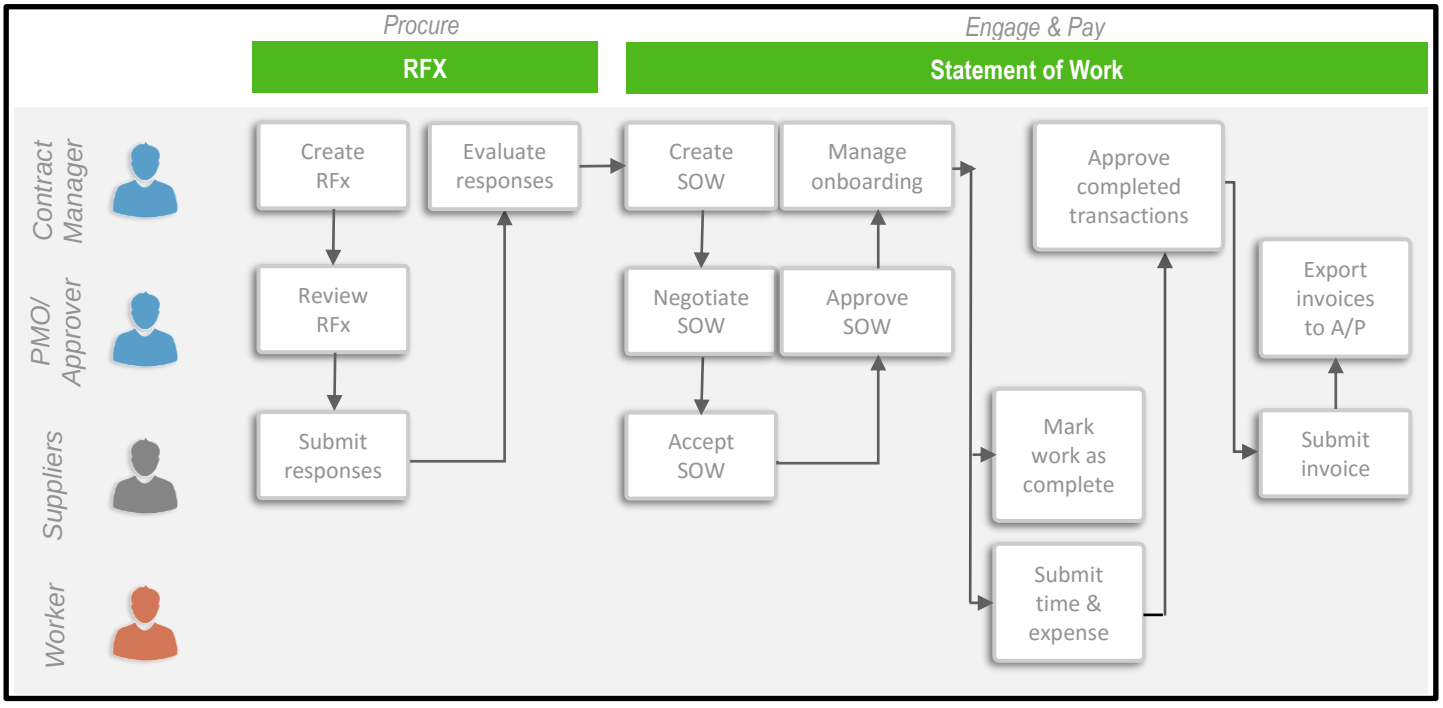
Introduction

The following illustrations represent possible workflow configurations between a buyer and supplier. While these examples may not represent your configuration, they are included here to provide a baseline understanding of the SAP Fieldglass application and the possible interactions between buyers and suppliers.

Contingent Labor



Services (Statement of Work)



THE SAP FIELDGLASS APPLICATION

Introduction

SAP Fieldglass is a web-based application that runs from your internet browser. No installation is required on your computer; you only need a connection to the internet to access SAP Fieldglass.

When a buyer company includes a supplier in their contingent workforce management program, the buyer will invite the supplier to register for the SAP Fieldglass application. A supplier company must sign an SAP Fieldglass Contractor Access Agreement (CAA) before the supplier's SAP Fieldglass account can be created. After the CAA is signed, an invitation to register for the SAP Fieldglass application will be sent.

Registration emails are sent to the main contact (supplier account manager) provided by the buyer company. The supplier account manager is created as an administrator in the SAP Fieldglass application and can add additional supplier users as needed. It is the responsibility of the supplier account manager, not the buyer or SAP Fieldglass, to add additional supplier users.

When new users are created, they will receive an email with instructions on how to register their SAP Fieldglass account. When they have successfully registered their SAP Fieldglass user accounts, they will be able to log in with their new usernames and passwords.

In this Chapter

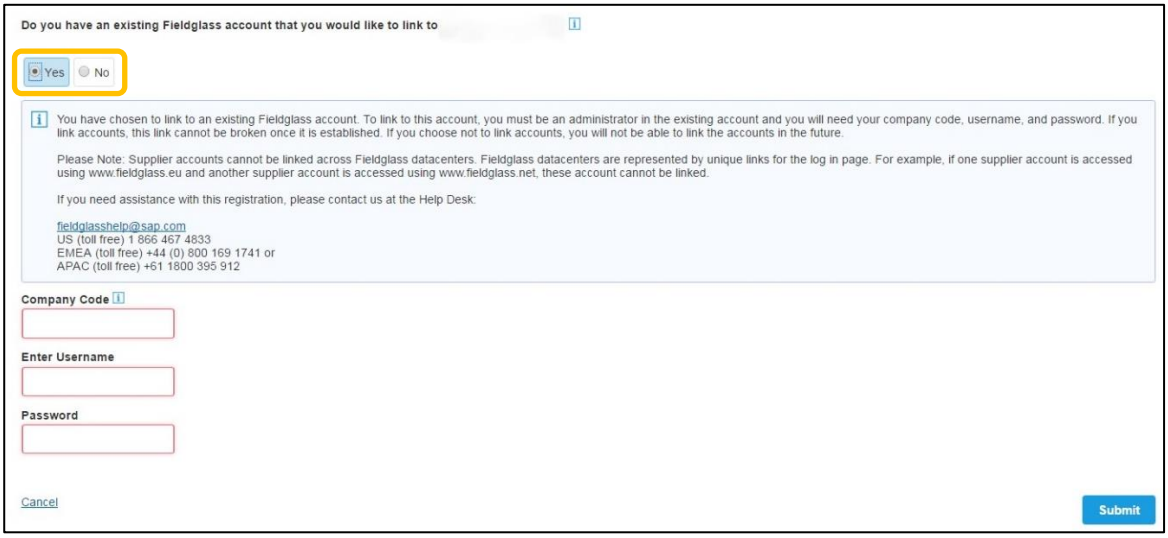
In this chapter, you will learn how to:

- Link to an existing supplier account
- Register in SAP Fieldglass
- Log in to the SAP Fieldglass application
- Navigate through the SAP Fieldglass application
- Understand SAP Fieldglass ID naming conventions

Supplier Account Linking

If you are new to a buyer, but already have an existing supplier account, you have the option to link your new buyer account to your existing account. When you link accounts, all documents will be housed in the same location and will be differentiated based on the company code stored in the item ID. Linking accounts may allow you to complete actions for multiple buyers more quickly, as you do not have to switch accounts for each buyer.

To link supplier accounts, choose **Yes** when presented with the below question during the registration process:



You will need to enter your username and password as well as your company code for your *existing* SAP Fieldglass Account. This step must be completed by an Administrator type user within the existing account, otherwise the login credentials will not be accepted.

If you do not want to link accounts, select the **No** radio button and press **Submit** to be taken to the next step. You are not required to link accounts.

Note: Supplier Accounts **cannot** be linked/unlinked once the registration is complete.

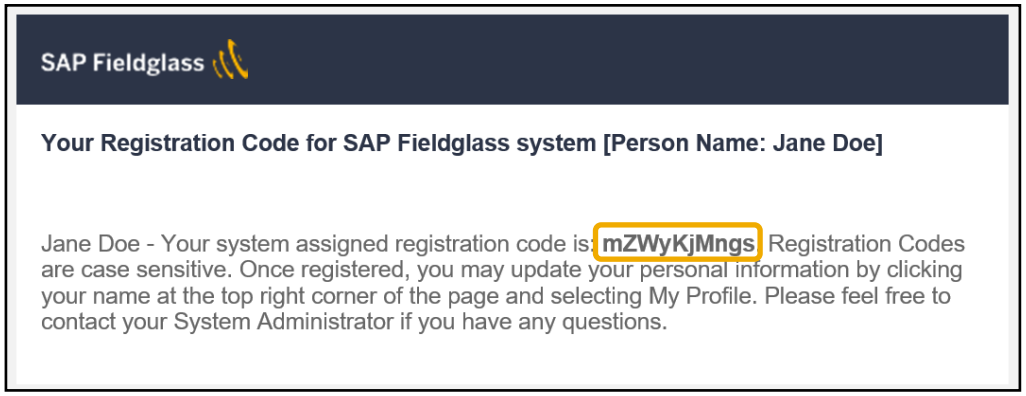
Registering in SAP Fieldglass

When a supplier has been invited to join the SAP Fieldglass system for a specific buyer company, the supplier account manager will receive an email with instructions on how to register his or her account. The supplier account manager's user account is automatically created as an SAP Fieldglass Administrator account. Administrators have access to everything within their supplier account and can create additional supplier user accounts. Newly created users will receive two emails regarding SAP Fieldglass registration:

SAP Fieldglass Registration Emails		
From:	**Subject**	**Description**
SAP Fieldglass	Your Registration Code for SAP Fieldglass system	Contains an alphanumeric code needed to complete your registration.
SAP Fieldglass	Welcome to the SAP Fieldglass system	Contains the link to the SAP Fieldglass registration page.

The registration emails are time sensitive and expire after 21 days. If your registration becomes inactive, please contact the SAP Fieldglass Customer Support Team to generate a new one.

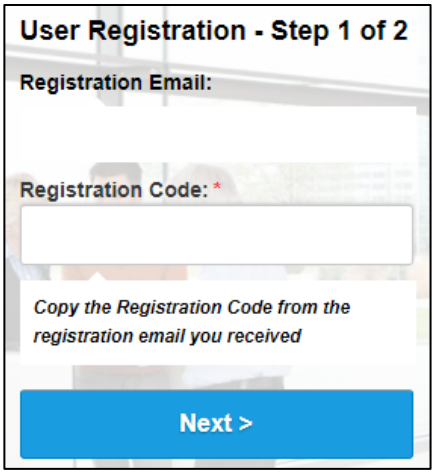
To register your SAP Fieldglass account:



1. Copy the temporary registration code found in the first email.

   Note: To copy text, highlight the text and press **Ctrl-C**, or right click and select **Copy**.

2. Click the link in the second email to go to the SAP Fieldglass website.



3. Paste the temporary registration code into the **Registration Code** field and click **Next**.

   Note: To paste copied text, press **Ctrl-V** or right click and select **Paste**.

4. Enter a Username, Password (and Re-Enter Password), Secret Question and Answer to Secret Question.

   Note: The **Secret Question** and **Answer to Secret Question** fields are used if you forget your password and need to reset it.

5. Review all the fields and update any fields that are not accurate.

6. Click **Sign In**.

Supplier Company Setup Wizard

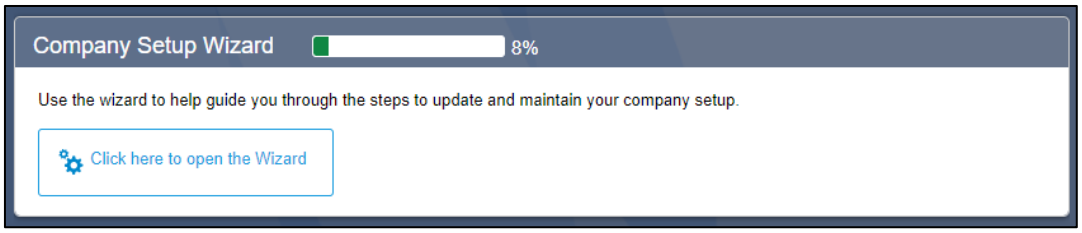
When supplier administrator users log into SAP Fieldglass, their home pages display the SAP Fieldglass Company Setup Wizard. The wizard is ideal for new supplier administrator users who may not be familiar with the available SAP Fieldglass features and functionality. Existing suppliers can also use the wizard to gain a better understanding of the options available to them.

The use of the Company Setup Wizard is optional. Suppliers can continue to administer SAP Fieldglass using the existing admin objects.

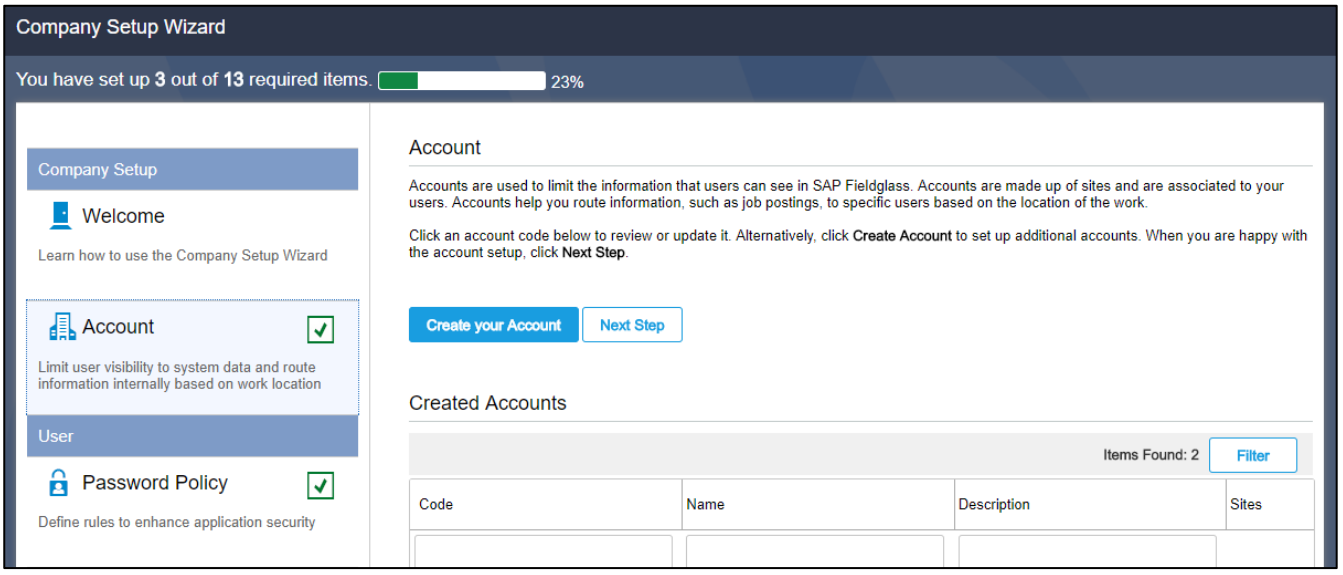
To use the Supplier Company Setup Wizard:

1. Click on the **Click here to open the Wizard** button

   Note: If the wizard was opened previously, a bar graph displays the progress toward completing the wizard.



2. Click **Let's Get Started** to begin company setup.
3. Wizard steps are shown in the left pane. To jump to a step, click the step name. The locked icon displays next to wizard steps that cannot be accessed until all previous steps are completed.



4. Click **Exit Wizard** at any step to exit the wizard. The wizard can be reopened by clicking **Click here to open the Wizard** button on the home page.

Logging In to SAP Fieldglass

Users who have already registered in SAP Fieldglass can sign in directly to the SAP Fieldglass application from their internet browser.

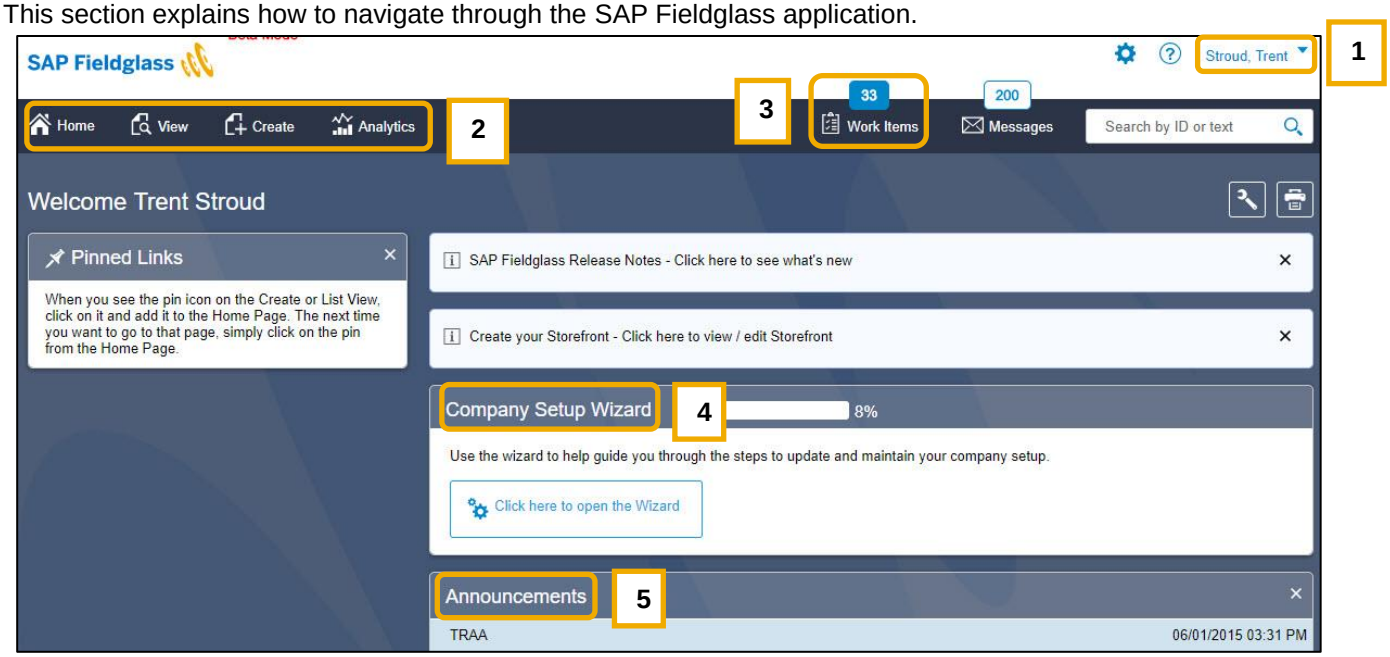
1. To log in to SAP Fieldglass, navigate to **https://www.fieldglass.net**.
2. Enter your **Username** and **Password**.

   Note: If you have forgotten your username or password, click **Need help signing in?** for assistance.

3. Click **Sign In**. The SAP Fieldglass desktop is displayed.

Basic Navigation Concepts

This section explains how to navigate through the SAP Fieldglass application.



Navigation

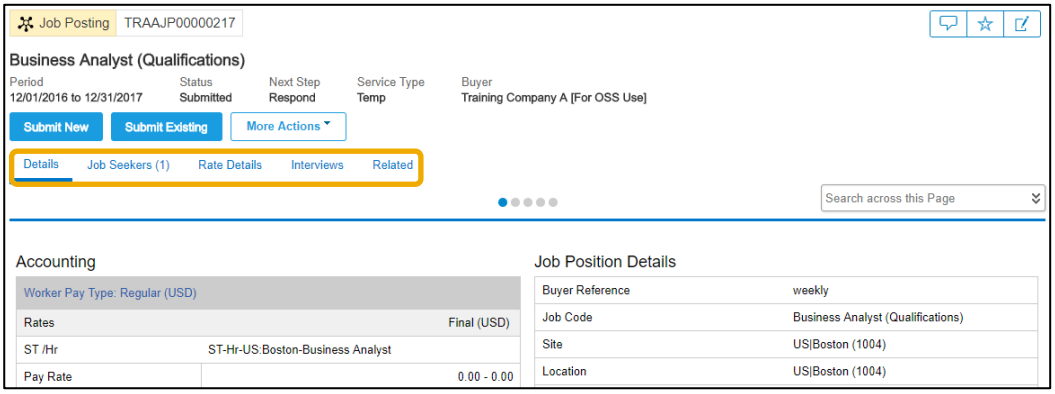
1. At the top of the screen, the system displays the name of the current user. If a user has linked accounts or is a delegate for another user, next to the user's name is the company code. If there are no accounts linked, placing the cursor over the user's name will result in the company code being displayed. The company code is a unique identifier for your organization. When contacting SAP Fieldglass Customer Support for assistance, you will be asked for your company code. The arrow next to the company code allows you to access other user accounts to which you have access, including accounts for which you are a delegate.
2. The menu bar provides access to the various functions within SAP Fieldglass. To view the options within each menu, click the menu name. The available options will be displayed for each menu. To navigate to an item in the menu, click the desired option. Click the **Home** icon on the menu bar or the SAP Fieldglass logo at any time to return to the SAP Fieldglass home page.
3. Work Items are transactions that require action in SAP Fieldglass. Click the **Work Items** menu to view all active work items for your user account.

4. The Supplier Company Setup Wizard can be used to help guide you through the steps to update and maintain your company setup. For more information, see the **Supplier Company Setup Wizard** section.
5. Buyer companies may display a customized announcement on the Home page.

Navigating in SAP Fieldglass is accomplished through menus. Menus are listed at the top of every page in SAP Fieldglass:

SAP Fieldglass Menus	
Menu	**Description**
Home	The **Home** page (or SAP Fieldglass desktop) is your starting point within SAP Fieldglass. The SAP Fieldglass desktop provides you quick access to messages and items requiring your attention (work items). Click the **Home** icon at any time to return to the SAP Fieldglass desktop.
View	Use the **View** menu to locate and view items, such as job postings, workers, or time sheets. For example, if you select **Job Posting** from the **View** menu, the system shows the current job postings for a specified date range. You can use the search options at the top of each list to filter the items that are displayed. The **View** menu also allows you to access a list of recently viewed items, as well as any items that you have marked with a star so you can search for and return to them easily.
Create	Use the **Create** menu to create new transactions in SAP Fieldglass. The items you can create will be based on your specific system configuration. Examples of new transactions are workforce, invoices, and miscellaneous invoices.
Analytics	Use the **Analytics** menu to run or create reports, such as a list of time sheets in draft status.
Work Items	Use the **Work Items** menu to display a list of current items that require action.
Message Center	Use the **Messages** link to view a list of messages that have been sent to you. For more information, see “Message Center”.
Admin	Use the **Admin** icon to access My Profile and My Preferences, as well as the **Admin** menu, which is used to access SAP Fieldglass administrative functions.
Help	Use the **Help** icon to access Online Help, Release Notes, and the Reference Library. In addition, the **Help** menu allows you to view contact information for SAP Fieldglass support as well as the SAP Fieldglass application version.

Tabs



Within the detail view for a record, such as a job posting work order and worker, tabs are used to group related information. Click each tab to view additional information about the document. For example, the **Job Seekers** tab for a job posting would list all job seekers that you have submitted to this posting.

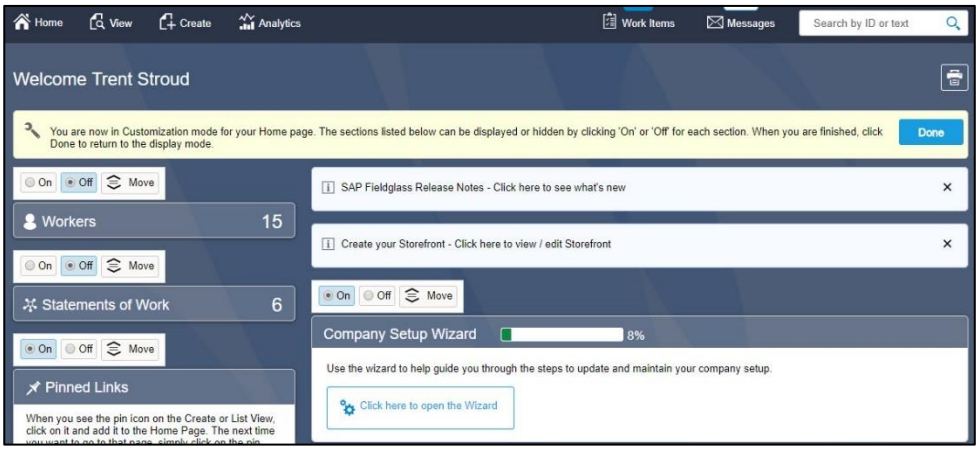
A **Search across this Page** field is visible when viewing some documents. This searches for the requested term(s) across all tabs on a document, highlighting the tab in which the term appears as well as the term itself.

Home Page Customization

All users may customize their SAP Fieldglass Home page by specifying the information that should be displayed.

To customize your Home page:

1. On your SAP Fieldglass Home page, click the **Customize** button.



2. For each section shown, select **On** to display the section on your Home page or select **Off** to remove the section from your Home page. Widgets and sections can be rearranged by clicking on the **Move** button and dragging to the desired location.
3. If you have permission to view graphs on your Home page, scroll down click **Manage Reports/Charts.** In the **Associate Reports/Charts to User** dialog box, search for the report/chart you want to display on your Home page and click **Add Selected**. When the **Selected Reports/Charts** list is complete, click **Associate**.

4. When you have completed your selections, click **Done**.

Filtering, Sorting and Grouping Lists

When a list of items is displayed, the list can be filtered, sorted, or grouped.

When you filter a list, only those records that meet the search criteria you specify will be displayed. To specify search criteria, use the fields located above certain columns. Depending on the data displayed in the column, you can select a value or enter a value that you want to search for. You can also specify the time period in which you want to search. Click **Filter** to apply your search criteria to the list.

Click a column header to sort the list by that column. An arrow pointing up indicates that the column is sorted in ascending order, while an arrow pointing down indicates that the column is sorted in descending order. To reverse the sort order, click the column header again.

By default, items within a list are usually not grouped. To group items, the Group By field allows you to select a field by which to group. For example, you could group a listing of time sheets by Status.

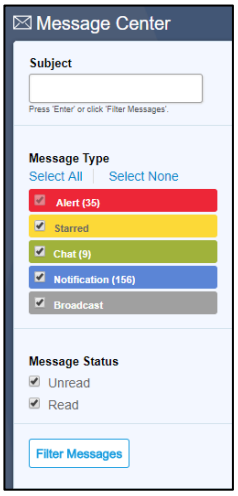
Depending on the structure of your supplier organization, you may choose to limit visibility or access by creating various user roles or creating various account managers who are assigned to specific locations or labor types. In this situation, you will have access to your account data, but you may also have access to additional data, such as all data within your supplier account. The **View** radio buttons will help you filter the data so you can view your account data (for example, job postings in Illinois or all admin job postings) or all data within the supplier account.

Message Center

The SAP Fieldglass application sends messages to users notifying them when there are items requiring their attention. For example you may receive a message when a job posting has been submitted by a buyer or when workers are nearing their end dates.

To view messages in the Message Center:

1. Click the **Messages** button in the upper-right corner of the SAP Fieldglass page.



2. Use the options on the left side of the page to filter the messages that are displayed in your Message Center.

   - **Subject.** If desired, enter a word or phrase that appears in the Subject of the messages you want to view.
   - **Message Type.** Select the check box(s) for the message types you want to view. To view all message types, click Select All. To remove Starred, Chat, Notifications, and Broadcast messages from your Message Center list, click **Select None**.
     Note: You cannot remove Alert messages from the Message Center.
   - **Message Status**. Select the **Unread** check box to display messages you have not read. Select the **Read** check box to display messages you have read.

3. Click **Filter Messages** to display the messages that meet your search criteria.
4. Click the column headers to sort the messages in the Message Center.
5. To mark a message as read, select the check box next to the message in the Message Center list and click **Mark as Read**.
6. To remove a message from your Message Center, select the check box next to the message in the Message Center list and click **Remove Selected**. The message is permanently removed from your Message Center.
7. To view a message, click the message in the Message Center list.

   If a message includes a **Go to Source** link, you can click the link to display the source of the message. For example, if you click the Go to Source link in a time sheet notification, SAP Fieldglass will display the time sheet referenced in the message.

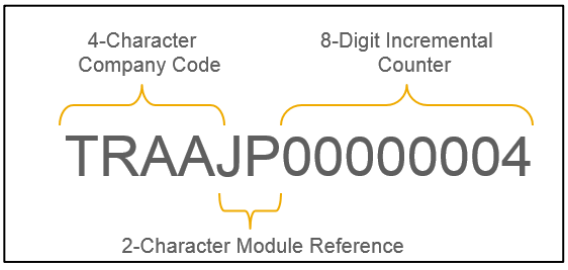
8. When you have finished viewing a message, you can:

   - Click **Remove Message** to remove the message from your Message Center.
   - Click **Next** to view the next message in the Message Center list.
   - Click **Back to Messages** to return to the Message Center list

ID Naming Convention

SAP Fieldglass is organized by modules. Modules are groups of related items or transactions. For example, Job Postings and Work Orders are two modules within the SAP Fieldglass application.

Every transaction within a module is assigned a unique ID number for tracking. For example, when a job posting is created, it is assigned a unique job posting ID number. SAP Fieldglass uses a consistent convention for assigning ID numbers. ID numbers are comprised of three separate components:



1. The Company Code consists of either the buyer's or supplier's company code, depending on who created the item.

2. The module reference indicates the type of item. For example, JP is used for Job Postings and WO is used for Work Orders.
3. A unique number that is assigned sequentially.

For example, if a buyer with a company code of TCMP creates a job posting, the job posting ID number might be TCMPJP00000057. If a supplier with a company code of ABCS submits a job seeker for the posting, the job seeker ID might be ABCSJS00000008.

The following table lists the module reference codes that are used within SAP Fieldglass:

SAP Fieldglass Module Reference Codes	
Reference Code	**Module**
JP	Job Posting
JS	Job Seeker
WO	Work Order
WK	Worker
WF	Workforce
TS	Time Sheet
ES	Expense Sheet
IN	Invoice
CD	Credit/Debit Memo
MI	Miscellaneous Invoice
CI	Consolidated Invoice
TQ	Statement of Work
TU	Statement of Work Fee
PE	Statement of Work Event
PS	Statement of Work Schedule
PC	Statement of Work Credit/Debit Memo
PI	Statement of Work Invoice
PW	Profile Worker

Understanding the ID naming convention will help you easily locate the items you are looking for. In addition, when you contact the SAP Fieldglass Customer Support Team for support, you will be asked for the ID number of the item you need assistance with.

ADMINISTRATOR FUNCTIONS

Introduction

The administrator functions that you will need to configure SAP Fieldglass for your supplier users can be found in the **Admin** menu. Many administrator functions can also be completed through the Supplier Company Setup Wizard, located on the home page.

Access the Admin Menu

To access the **Admin** menu:

1. Click the **Admin** icon in the upper right of the SAP Fieldglass desktop. You will see the available options in the Admin menu.

Admin Menu Areas

The various areas on the SAP Fieldglass Admin menu are described below.

SAP Fieldglass Admin Menu	
Menu Area	**Description**
User	Use the **User** options to create new users, edit existing user profiles, add or update user roles, and establish password rules.
Buyer	Use the **Buyer** options to view and edit buyer information, such as contact information, remit-to address, account managers and sites.
Company Structure	Use the **Company Structure** options to view and update company information, such as accounts, business units, and labor types.
Messaging	Use the **Messaging** options to customize messages sent within your supplier instance.
Workflow	Use the **Workflow** options to view and update messaging preferences, as well as establish onboarding and offboarding items.
Configuration	Use the **Configuration** options to view and update custom fields, establish invoice tax information, and add reason codes.
Report	Use the **Report** options to create report categories and view the report audit trail.
Integration	Use the **Integration** options to upload items, such as time sheets.
System Tools	Use the **System Tools** options to view the system audit trail, as well as to view notifications and act on work items for a user.

USER

Introduction

As an administrator, you will create new users and edit existing user profiles. It is the responsibility of the supplier administrator to add the necessary supplier users. Administrators can also create new user roles. A user role, such as “Recruiter,” defines the access, permissions, and activities a user can perform in the SAP Fieldglass application. Each user is assigned to a user role.

Supplier administrators may also need to reset a user’s password if the user is unable to log into the SAP Fieldglass application.

In this Chapter

In this chapter, you will learn to:

- Create a new user
- Edit an existing user
- Reset a user’s password
- Update password policy settings
- Assign user proxies
- Work with user roles

Creating a User

To create a new user:

1. Click the **Admin** icon.
2. Click the **User** link in the **User** section.
3. Click **New**.
4. Enter information into all the required fields for each section on this page. For more information, see “User Field Definitions”.
5. When the user information is complete, click **Add**.

   The new user has been saved in the SAP Fieldglass application.

   The new user will receive two invitation emails (one containing a link to the registration page, the other a temporary password) to start using SAP Fieldglass.

   The **User: Details** page is displayed, with a warning message at the top of the page. This message informs you that you may wish to associate the user to other SAP Fieldglass objects. In the case of users, they may be associated to Report Categories or Proxies. These associations are optional and are discussed later in this guide.

Editing an Existing User Profile

To make changes to an existing user profile:

1. Click the **Admin** icon.
2. Click the **User** link in the **User** section.

3. To view the details for a user, click the user's name in the **Name** column. If needed, you can search for the user whose information you want to edit. To search for a user, enter your search criteria in the **Name**, **Role**, or **Account** fields and click **Filter**. You can also sort columns by clicking the column header.
4. Click **Edit**.
5. Make the necessary changes to the information displayed on the page. For more information, see "User Field Definitions".
6. Click **Update**.

User Field Definitions

Note: Fields marked with an asterisk (*) are required. They are outlined in red in the application.

User Field Definitions	
Field Name	**Description**
Prefix	Select the appropriate prefix for the user.
First Name*	Enter the user's first name.
Last Name*	Enter the user's last name.
Username*	Enter a username. The username is entered when an individual logs into the SAP Fieldglass application and must be unique. It is recommended that the user's email address be used as the user name.
Display Name*	Enter the user's name as it should display within the SAP Fieldglass application. For example, you may wish all users' display names to appear as Last Name, First Name.
Email*	Enter the user's email address. The SAP Fieldglass registration email message, as well as all SAP Fieldglass notifications, will be sent to this email address.
Cc Email Addresses	Enter additional email addresses that should be included on the Cc: line of emails sent from the SAP Fieldglass application to this user.
Profile Picture	You may attach a profile picture for the user here, if desired.
Employee ID	Enter the user's employee ID or other information, if desired.
Title	Enter the user's title, if desired.
Role*	Select the user's role from the drop-down list. Roles define the user's permissions and visibility and must be established prior to creating the user.
Primary Business Unit*	Select a Primary Business Unit.
Primary Supervisor*	Select the user's supervisor. The list in this field contains all existing users that have been created for your supplier account. The supervisor will be sent escalation messages when the user has uncompleted actions that are past their threshold date.
Account*	Select the user's account. Accounts are created by the supplier administrator and provide a method of segregating data for reporting

	and visibility. (For more information, see “Adding a New Account” in this guide).
Feature Access	Turn features on or off by selecting or clearing the check box for each feature. If the **View and Report on Sensitive Data** feature is selected, the user will be able to view the data in fields that are marked as sensitive, such as Social Security Number. When this feature is not selected, the user will see “***” in fields that are marked as sensitive.
Messaging	For each message type, select the check box if the user should receive email messages of that type. Clear the check box if the user should not receive email messages of that type. Regardless of the email preferences selected, users will receive all messages in their Message Center.
Currency	Select the user’s default currency.
Time Zone	Select the user’s time zone.
Date Format	Select the user’s desired date format.
Time Format	Select the user’s desired time format.
Number Format	Select the user’s desired number format.
Language	Select the user’s desired language.
Calendar Start Day	Select the user’s desired start date for the SAP Fieldglass calendar drop-down, for example, Sunday or Monday.
Email Format	Select the user’s desired email format.
Show Home Page Announcement	Determine whether the user will view any home page announcements.
Contact Information	Enter the user’s contact information.

Resetting a User’s Password

When you reset a user’s password, the user will be sent an email with a temporary password. When the user signs into SAP Fieldglass with the temporary password, the user will be prompted to change the password.

To reset an existing user’s password:

1. Click the **Admin** icon.
2. Click the **User** link in the **User** section.
3. Click the user’s name in the **Name** column. If needed, you can search for the user whose password you want to reset. To search for a user, enter your search criteria in the **Name**, **Role**, or **Account** fields and click **Filter**. You can also sort columns by clicking the column header.
4. Click **Reset Password**.
5. Click **Reset**.

Changing the User Password Policy Settings

Password policies establish the rules surrounding user passwords. For example, you may set a minimum or maximum password length, or the number days before passwords expire. Password policies apply to all supplier users. Default password policy settings are established in SAP Fieldglass; however, you can change these settings based on your organization's specific needs.

To change the user password settings:

1. Click the **Admin** icon.
2. Click the **Password Policy** link in the **User** section.
3. Click **Edit** in the upper right corner.
4. Make all required changes to the password settings. For more information, see "Password Policy Field Definitions".
5. Click **Update**.

Password Policy Field Definitions

Note: Fields marked with an asterisk (*) are required. They are outlined in red in the application.

SAP Fieldglass Password Policy Field Definitions	
Field Name	**Description**
Minimum Length*	Enter the minimum number of characters that passwords must contain.
Maximum Log in Attempts*	Enter the maximum number of times that users should be allowed to unsuccessfully attempt to log in before their accounts are disabled. Depending on the **User Lockout** setting value (see the next field in this table), the user's account may become active again in ten minutes, or an authorized user may need to reset the account before the user can log in.
User Lockout: Require authorized users to reset disabled user accounts	If this check box is selected, a user with the required permission must reset disabled user accounts. If the check box is not selected, disabled user accounts will be automatically reset after ten minutes.
Password must not begin or end with a number	If this check box is selected, passwords must not begin or end with a number.
Number of days to expiration*	Enter the number of days that passwords are valid before they expire.
Number of retained passwords*	Enter the number of passwords that the system should remember for each user. When users reset their passwords, they will not be able to reuse passwords that SAP Fieldglass "remembers." This feature prevents users from reusing recently used passwords.
Maximum consecutive identical characters*	Enter the maximum number of consecutive identical characters that a password may contain. For example, if "3" is entered in this field, the passwords **Yes1111No** and **aaaabbbbcccc** would be disallowed.
Maximum characters in Sequential order*	Enter the maximum number of characters in sequential order that a password may contain. For example, if "3" is entered in this field, the passwords **bcdefpassword** and **password34567** would be disallowed.

Minimum password age (in minutes)*	Enter the minimum age (in minutes) that a password must be before it can be reset.
Passwords not allowed (Passwords are separated by ',' and each cannot exceed 16 characters.	Enter any specific passwords that cannot be used. Use commas (,) to separate the passwords. The passwords in this list can be no more than 16 characters long.
Password must contain	Select the appropriate check box if passwords must contain a capital letter, a lower-case letter, a numerical value, or a special character.
Password cannot contain	Select the appropriate check box if passwords cannot contain the user's SAP Fieldglass username, last name, first name, or email address.

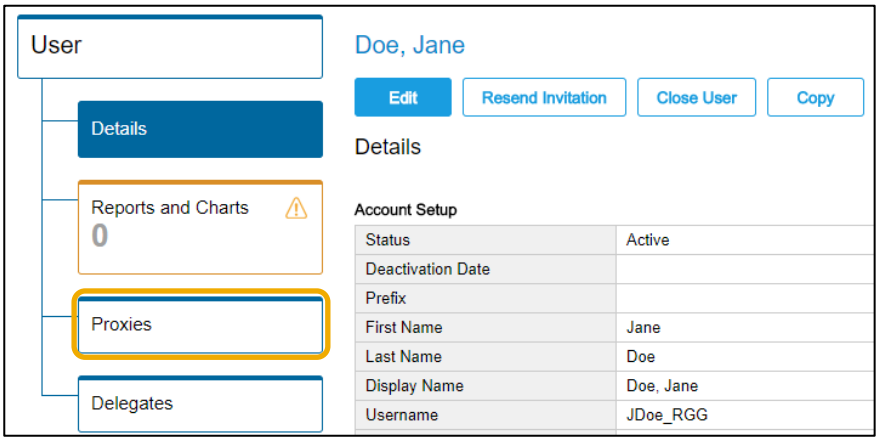
Adding a Proxy to a User's Profile

A proxy is a person who can act upon another user's work items in the SAP Fieldglass system (for example, responding to a job posting, accepting an interview schedule, or accepting a work order).

Typically, users will add proxies for themselves. However, administrators can add a proxy to a user's profile so the proxy can perform the user's SAP Fieldglass duties if the user is unavailable to do so.

You can also update or remove proxies already in the user's list.

1. Click the **Admin** icon.
2. Click the **User** link in the **User** section.
3. In the **Name** column, click the name of the user for whom you want to select a proxy.
4. To view the user's proxy information, click the **Proxies** link on the left side of the page.



The **Proxies** displays any proxies that are currently assigned to the user.

5. To add a proxy, click **Add Proxy**.
6. Enter the requested information about the user's new proxy. For more information, see "User Proxy Field Definitions".
7. When all selections have been made, click **Add**.

Editing a User's Proxy

You may want to edit the information associated with a user's proxy. In particular, you can change the proxy start date or end date.

To edit information about a user's proxy:

1. Click the **Admin** icon.
2. Click the **User** link in the **User** section.
3. In the **Name** column, click the name of the user for whom you want to edit a proxy.
4. Click the **Proxies** link on the left side of the page.
5. Click **Edit** (the pencil icon) next to the proxy whose information you want to update.
6. Make all the necessary changes to the proxy information. For more information, see "User Proxy Field Definitions".
7. Click **Update**.

Removing a Proxy from a User's Profile

To remove a proxy from a user's profile:

1. Click the **Admin** icon.
2. Click the **User** link in the **User** section.
3. In the **Name** column, click the name of the user for whom you want to remove a proxy.
4. Click the user **Proxies** link in the **User** section on the left side of the page.
5. Click **Remove** (the "X" icon) next to the proxy to be removed.

   A message asks you to confirm that this proxy should be removed.
6. Click **OK**.

User Proxy Field Definitions

User Proxy Field Definitions	
Field Name	**Description**
Work Items	Select **All** to allow the proxy to act on all the user's work items. Select **Time Sheet** to allow the proxy to approve time sheets only.
Proxy	Select the SAP Fieldglass user who should be the user's proxy.
Role	The proxy's role is automatically displayed.
Start Date	Enter the date on which the proxy will first be able to act for the user.
End Date	Enter the final date on which the proxy will be able to act for the user. If this field is left blank, the proxy will able to act for the user until he or she is removed as proxy.

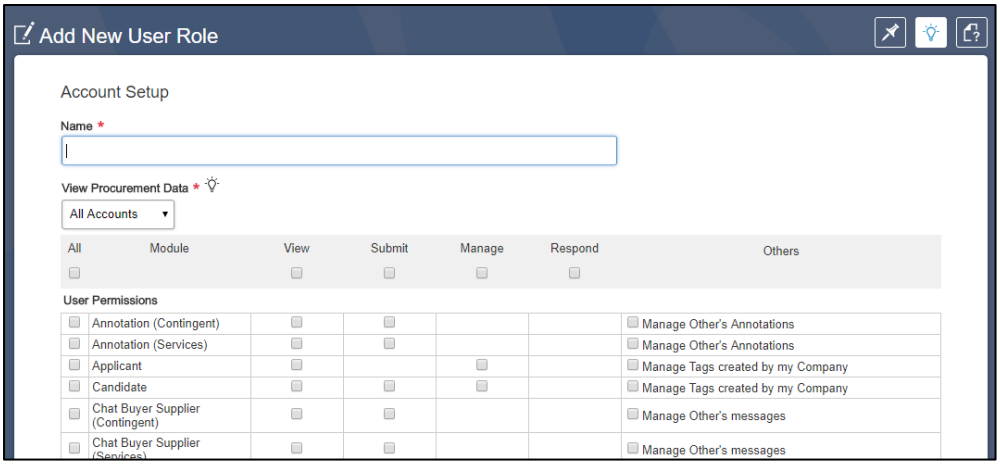
Creating a User Role

User roles define the permissions a user has in the SAP Fieldglass application. These permissions control the actions that the user can take. For example, you may establish a user role that allows certain users to view job seekers, but does not allow these users to submit the job seekers to job postings.

To create a new user role:

1. Click the **Admin** icon.
2. Click the **User Role** link in the **User** section.
3. Click **New**.

   Note: If you have previously created a role, you can copy the existing role, enter a new name for the new role, and make the desired changes. This process may be more efficient than creating a new role from scratch. To copy an existing role, select the name of the desired role and then click **Copy**.



4. Enter the requested information about the user role. For more information, see “User Role Field Definitions”.
5. To save the user role, click **Add**.

User Role Field Definitions

Note: Fields marked with an asterisk (*) are required. They are outlined in red in the application.

User Role Field Definitions	
Field Name	**Description**
Name*	Enter a name for the field.
View Procurement Data*	Select the type of data this user role can see: • Select **All Accounts** if users in this role will see data for all accounts. • Select **User’s Accounts** if users in this role will see only data related to the accounts with which they are associated. **Note:** Accounts are discussed in “Company Structure”.

User Permissions	Select the permissions that users with this role will have: • To give this user role all available permissions, select the **All** check box in the top-left corner of the list. • To give the user role all available permissions for a given area (such as Applicant, Candidate, or Credit/Debit Memo, select the check box in the **All** column next to the applicable area. • To give the user role a specific permission (such as View, Submit, or Manage) for all available areas, select the check box at the top of the column for the permission. • To give the user role a specific permission, select the check box for the type of permission and area.
Administrative Permissions	Administrative permissions are related to functions performed by system administrators in the Admin Menu. The instructions for User Permissions above apply to this section as well.

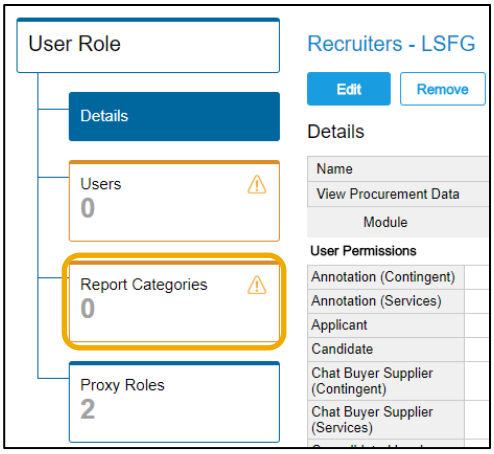
Associating a User Role with Report Categories and Proxy Roles

Reports and charts are assigned to categories. For example, an invoice report may be assigned to the “Spend” category. You can associate the user role with a specific category, thus limiting the view of users in the selected role to only the reports and graphs assigned to the category associated with their role.

You can also associate proxy roles with a user role. This will allow users in the additional roles to serve as proxies for the selected role.

To associate a user role with report categories or proxy roles:

1. Click the **Admin** icon.
2. Click the **User Role** link in the **User** section.
3. Click the name of the user role you want to which you want to associate report categories or proxy roles.



4. In the menu on the left hand side of the page, select either **Report Categories** or **Proxy Roles**.
5. Select the desired item and click **Add** to complete the associations.

Editing a User Role

To update the properties of an existing user role:

1. Click the **Admin** icon.
2. Click the **User Role** link in the **User** section.
3. Click the name of the user role you want to edit.
4. Click **Edit**.
5. Make all necessary changes to the role. For more information, see “User Role Field Definitions”.
6. Click **Update**.

Changing a User's Role

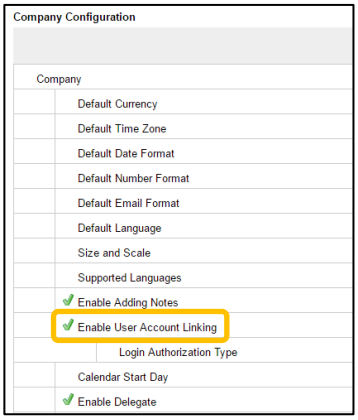
To change the role associated with a user's profile:

1. Click the **Admin** icon.
2. Click the **User** link in the **User** section.
3. In the **Name** column, click the name of the user whose role you want to change.
4. Click **Edit**.
5. Scroll down to the **Role** drop-down list and select a new role.
6. Click **Update**.

User Account Linking

Users with multiple supplier accounts can link user accounts between instances. To do this, the **Enable User Account Linking** setting must be enabled at the company configuration level. This will need to be enabled for all company instances when linking across tenants. To determine if this is enabled, follow these steps:

1. Click the **Admin** icon.
2. Click the **Company Details** link in the **Company Structure** section.
3. Scroll down to the **Company Configuration** section.
4. If a red X appears next to the **Enable User Account Linking** setting, you will need to contact the Fieldglass Customer Support Team to have this setting enabled. If a green check mark appears next to the setting, users within the instance will be able to link accounts.



5. If the **Enable User Account Linking** configuration is not enabled, please reach out to the SAP Fieldglass Customer Support Team to have it enabled.

6. Once the configuration has been enabled, follow the steps in the Linking User Accounts section of the Supplier Transactional Guide to link individual user accounts.

COMPANY STRUCTURE

Introduction

As an administrator, you are responsible for maintaining company structure information, including accounts, business units, and labor types.

Accounts

Supplier accounts are used to limit the information that users can view and act upon. Supplier accounts are used in conjunction with buyer sites. When a buyer company implements the SAP Fieldglass application, the company establishes sites. Sites are typically geographical locations, such as Chicago, Illinois, or Frankfurt, Germany.

As a supplier administrator, you can create accounts and associate them with the buyer's sites. Accounts can then be associated with user profiles, which will limit each user's access to the specific sites associated with a user's account. Suppose a buyer has three sites, Chicago, Phoenix, and Orlando. You could create an account and associate these three sites to the account. A user who is assigned to the account will only be able to see items for these sites. If the buyer submits a job posting with a site of Miami, the user will not be able to access it (unless the Miami site is added to the account).

Alternately, accounts can be buyer specific. For instance, if your company services Buyer A, Buyer B, and Buyer C, you can set up accounts for each of these buyer companies. If you create an account with sites from Buyer A, the users attached to that account will only be able to see items from Buyer A.

You can also combine sites from different buyers. For instance if you want a user to see all sites for Buyer A as well as three sites for Buyer B, you can set up an account that includes all of Buyer A's sites plus the three sites for Buyer B. Users attached to this account will only have access to these sites.

When you create a user role, you can specify whether users assigned to the role should be able to see the data related to all accounts or only see data related to the accounts to which they are associated.

When a buyer creates a new site, a notification is sent to the supplier account manager. The supplier administrator must associate the new site to the desired account(s).

When a supplier instance is created, SAP Fieldglass establishes one default account that is associated to all buyer sites. Supplier administrators can update this information as desired.

Business Unit

Business units can be created to mimic your internal organizational structure, (for example, Human Resources, Customer Services, or Finance) if you choose to do so. Administrators can define escalation preferences that vary by business unit.

For example, one area of your business may require job postings to be responded to within 48 hours while another area may require job postings to be responded to within 72 hours. You can create multiple escalation thresholds and associate each threshold to the applicable business unit.

Labor Type

Labor types are groupings of the most common job types determined by industry-wide standards. Labor types are created by default within SAP Fieldglass and cannot be changed by the buyer or the supplier. When a buyer creates a job posting, the buyer must associate the posting to one of the default labor types. Suppliers can associate users to labor types to control visibility. For example, you may have some recruiters who only fill industrial positions, while other recruiters fill administrative and professional positions.

Company Details

Company details are typically established when your supplier instance is created in SAP Fieldglass. Company Details consist of two sections: Details and Company Configuration. The Details section contains basic contact information about your organization and can be changed at any time. The Company Configuration section includes system settings, preferences, and defaults. Changes to the Company Configuration settings require assistance from SAP Fieldglass.

In this Chapter

In this chapter, you will learn to:

- View accounts and account associations
- Create and update an account
- Associate accounts to sites and users
- Create and update a business unit
- View and edit company details
- View labor types and associate to users

Viewing Accounts and Account Associations

You can view Accounts and their associations to Sites and Users in the Account menu.

To display the list of accounts:

1. Click the **Admin** icon.
2. Click the **Account** link in the **Company Structure** section.
3. Click the Account **Code** for the account you want to view.
4. To view the sites associated with this account, click the **Sites** link on the left side of the page.
5. To view associated Users, click the **Users** link on the left side of the page.

Adding a New Account

To add a new account:

1. Click the **Admin** icon.
2. Click the **Account** link in the **Company Structure** section.
3. Click **New**.
4. Enter a code, name and description for the account. You can enter the same value for both the code and the name.
5. Click **Add** to save the new account.

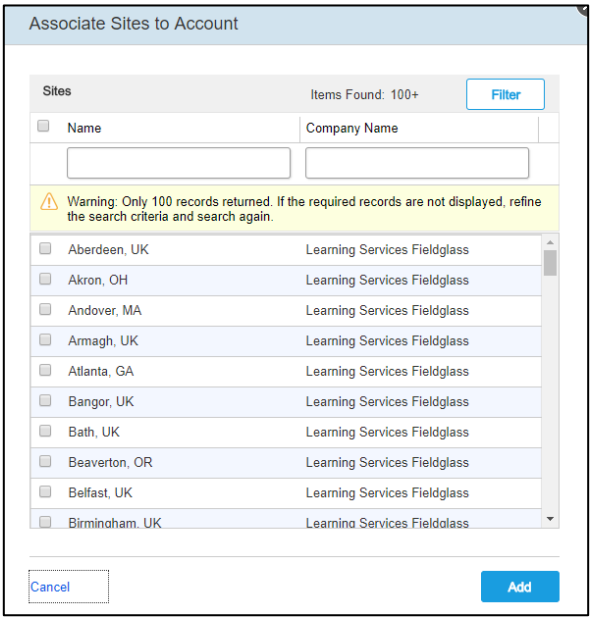
   The **Details** page is displayed for the new account. A warning message is shown at the top of the screen. This message informs you to perform the related associations to Sites and Users.

Associating Accounts to Sites

To associate accounts to buyer sites:

1. Click the **Admin** icon.
2. Click the **Account** link in the **Company Structure** section.
3. Click the Account **Code** for the account you want to associate to sites.
4. Click the **Sites** link on the left side of the page.
5. To add new sites to this account, click **Add**.
6. Enter search criteria (Name or Company Name) and click **Filter** to view sites that meet your search criteria. You can leave the search fields blank and click **Filter** for a list of all Sites.

7. Select the check boxes next to the sites you want to add to the account.



8. Click **Add**.

   Note: To remove a site from this Account, on the **Sites** page clear the appropriate check box and click **Update**.

Associating Accounts to Users

Users are associated to accounts via their user profiles. Users can be associated to only one account at a time. To associate a user to an account, select the desired account in the **Account** dropdown on the user's profile. For more information, refer to "Edit an Existing User Profile" in this guide.

Adding a New Business Unit

To add a new business unit:

1. Click the **Admin** icon.
2. Click the **Business Unit** link in the **Company Structure** section.
3. Click **New**.
4. Enter the requested information about the business unit. For more information, see "Business Unit Field Definitions".
5. Click **Add** to save the new Business Unit.

Business Unit Field Definitions

Note: Fields marked with an asterisk (*) are required. They are outlined in red in the application.

Business Unit Field Definitions	
Field Name	**Description**
Code*	Enter a unique business unit code.
Name*	Enter a name for this business unit. You can enter the same value for both the **Name** and **Code**.
Parent Business Unit*	Select the new business unit's parent business unit.
Escalation Preference*	Select an escalation preference. In SAP Fieldglass, escalations are message sent to a user's supervisor when certain actions have not been completed.

Viewing and Editing Company Details

You can edit certain company details, such as contact information. You can also view company configuration settings.

1. Click the **Admin** icon.
2. Click **Company Details** link in the **Company Structure** section.
3. Review the information displayed. Scroll down the page to view the Company Configuration settings. Information in the Details section, such as company address, can be edited. The Company Configuration settings cannot be changed by supplier administrators. Contact the SAP Fieldglass Customer Support Team if you need more information about Company Configuration settings.
4. To edit information in the Details section, click **Edit**.
5. Make all necessary changes and click **Update** to save.

Viewing Labor Types and Associating Users

1. Click the **Admin** icon.
2. Click the **Labor Type** link in the **Company Structure** section.
3. To associate users to a specific labor type, click the name of the labor type to which you want to associate users.
4. Click the **Users** link on the left side of the page.
5. Click **Add**.
6. Use the search fields (Username or Display Name) to enter search criteria and click **Filter**. To display a list of all users, leave the search fields blank and click **Filter**. Users who are associated with the Administrator role will not be displayed, as they my view information associated with all Labor Types.
7. Select the check box next to the user(s) you want to associate with the selected labor type.
8. Click **Add**.

BUYER

Introduction

Some suppliers service multiple SAP Fieldglass buyer companies. It is possible to have one supplier instance that has access to multiple SAP Fieldglass buyers (this would be established during your supplier instance set-up). Some information is set on an individual buyer basis. For example, you may allow one buyer to add individuals to your workforce, but not allow other buyers to do the same.

Suppliers may have unique remit-to addresses for each buyer company. You can also establish account managers (primary points of contact) for each buyer.

In this Chapter

In this chapter, you will learn to:

- View and update buyer information
- Associate buyers with remit-to addresses
- Manage account manager information

Viewing Buyer Information

To display a list of all buyers for your supplier instance:

1. Click the **Admin** icon.
2. Click the **Buyer** link in the Buyer section.

Editing Buyer Information

While some information contained in the buyer details section is set by the buyer company and is not editable, you can change certain information about the buyer. To update the buyer information:

1. From the Buyer List page, click the name of the buyer whose information you want to edit.
2. Click **Edit**.
3. Make all necessary changes to the fields described in “Buyer Field Descriptions”.
4. Click **Update** to save the changes.

Buyer Field Descriptions

Fields marked with an asterisk (*) are required. They are outlined in red in the application.

Buyer Field Descriptions	
Field Name	**Description**
Auto Invoicing for Contingent/Services	Determines whether documents, such as time & expense and payment characteristics, are automatically invoiced after approval. These flags will only appear if the auto invoice setting is not locked by the buyer.
Allow Buyer to Add to Workforce	To allow this buyer to add people to the workforce, select **Yes**.
Default Buyer visibility of all Workforce records	Determines whether all workforce records created when submitting job seekers or SOW workers will become visible to the buyer by default.
Primary Contact Person*	Select the person to designate as the primary contact person at the buyer company.
Primary Contact Person for Services*	Select the person to designate as the primary contact person for services (if enabled) at the buyer company.

Associating Remit-to Addresses to a Buyer

Buyer companies may use the remit-to addresses defined in SAP Fieldglass to remit payments to your company. For each buyer, you can associate the remit-to addresses that the buyer should use. You can only associate remit-to addresses that have been created. To create a new remit-to address, refer to “Adding Remit-to Addresses” in this guide.

To associate remit-to addresses with a buyer:

1. Click the **Admin** icon.
2. Click the **Buyer** link in the Buyer section.
3. Click the name of the buyer to which you want to associate remit-to addresses.
4. Click the **Remit to Addresses** link in the **Buyer** section on the left side of the page.
5. To associate an address with a Buyer, click **Add**.
6. To search for a remit-to address, enter a code in the **Code** field and click **Filter**. Leave the code blank and click **Filter** to display a list of all remit-to addresses.
7. Select the check box(s) next to the address(s) you want to associate with the buyer.
8. Click **Add**.

Changing Site Account Managers

In SAP Fieldglass, one person from each supplier company is designated as the account manager for each of a buyer's sites.

To view the current Account Managers:

1. Click the **Admin** icon.
2. Click the **Buyer** link in the Buyer section.
3. From the **Buyer List** page, click the name of the buyer for which you want to change the account manager.
4. Click the **Account Managers and Sites** link in the **Buyer** section on the left side of the page.

   The **Buyer: Account Managers & Associated Sites** page is displayed. The account manager for each buyer site is listed.
5. To change an account manager, click **Manage Account Manager**.
6. To view only those sites that are assigned to a specific account manager, search for the user in the **Account Manager** field. The listing of sites will change to show only the selected account manager's sites.

   Note: If a site does not have an account manager assigned, you will not receive job postings for that site. To view those sites without an account manager, enter **No Account Manager Assigned** in the **Account Manager** field, and click **Filter**. Be sure to assign account managers to these sites.
7. In the **Select & Assign** field, select the account manager you want to assign to one or more of the buyer's sites.
8. In the list of site assignments, select the check box(s) next to the site(s) to which you want to assign the selected account manager.
9. Click **Select & Assign**. The new assignments are displayed in the lower half of the page.
10. To save the new assignments, click **Update**.

MESSAGING

Introduction

The Messaging section of the **Admin** menu allows administrators to customize SAP Fieldglass messages.

In this Chapter

In this chapter, you will learn to:

- Understand SAP Fieldglass messages
- Edit system variables
- Customize SAP Fieldglass messages
- Enable or Disable a message

Understanding SAP Fieldglass Messages

SAP Fieldglass automatically generates several types of messages or notifications when certain activities take place. For example, when you create a new supplier user, a message is sent to the user with instructions on how to register the account. You can customize the SAP Fieldglass default messages based on your specific needs. You can also turn off specific messages to prevent them from being sent when an action takes place.

SAP Fieldglass utilizes system variables to determine the data values that populate in a message. System variables are fields or pieces or information that can be included in the subject or body of a message. Variables are module specific, and a default set of variables is enabled for each module. Variables can be disabled or additional variables can be enabled as needed. Additionally, custom fields that have been created for a module can be added to the system variables list for inclusion in messages.

Editing System Variables

To enable or disable system variables:

1. Click the **Admin** icon.
2. Click the **System Variables** link on the **Workflow** section.
3. Click the **Module** link for the desired module. For example, Job Posting.
4. Click **Edit**.
5. Make the desired changes.

   If the **Subject** or **Body of Text** checkbox for a variable is enabled, the value will be included on messages for the selected module. Values will only be included on messages if the variable is relevant to the message. For example a Decline reason would not be included on a job posting message unless the job posting was declined.

   Click the **Add Custom Fields** button to add previously created custom fields for the selected module to the system variables list. Once added, custom fields can be enabled for the Subject or Body of Text.

   The order in which variables appear in messages is based on the order they appear in the list. To change the order, click the move icon and drag the variable to the desired place in the list.

6. Click **Update**.

Customizing SAP Fieldglass Messages

To customize SAP Fieldglass messages:

1. Click the **Admin** icon.
2. Click the **Messaging** link in the **Workflow** section.
3. Use the **Module** field to select the desired module. SAP Fieldglass messages are grouped by module. For example, messages sent to new users are associated with the **User** module.

   The **Message List** page will refresh with a list of messages for the selected Module.
4. Click the **Default** link for the message you wish to customize. The recipients and default text for each enabled language can be customized.

5. Click **Edit** for the Selected Recipients for Message to view and change recipients. Click **Edit** for each language to change the default message text.
6. System variables not enabled on the system variables table can be embedded in the subject or body of a specific message. To add a variable, in the Subject or Body of Text field, type a # and select the variable from the list that appears.
7. Click **Update.**

Enabling or Disable a Message

To customize SAP Fieldglass messages:

1. Click the **Admin** icon.
2. Click the **Messaging** link in the **Workflow** section.

   Use the **Send this Message?** checkbox and the **Enable Message** or **Disable Message** buttons to enable or disable messages. You can enable or disable multiple messages at once.

CONFIGURATION

Introduction

SAP Fieldglass allows supplier administrators to configure the application for their unique business processes and workflows. For instance, you can add custom fields to collect additional information, and establish reason codes.

In this Chapter

In this chapter, you will learn to:

- Create and maintain custom fields
- Create and maintain reason codes
- Create and maintain invoice tax information
- Create and maintain remit-to address information

Managing Custom Fields

Custom fields can be used to track information in fields that are not standard SAP Fieldglass fields. For example, a custom field could track whether job seekers have ever worked for your company before. Custom fields are created by module. The module determines where in the SAP Fieldglass application the custom field will display. For example, you could have one custom field related to job seekers and a second custom field related to work orders.

It is also possible to link custom fields across modules. For example, if you wanted a custom field to be displayed for job seekers and also for work orders, you would not need to create two custom fields. You could create a custom field in the job seeker module and link it to the work order module.

Custom fields may be set as mandatory and/or read only. Read only custom fields are useful when you would like to store information in the SAP Fieldglass system for use in reports, but do not want the data to be changed.

Seven types of custom field are available in SAP Fieldglass:

Custom Field Types	
Data Type	**Description**
Text	Allows users to enter text of up to 100 characters.
Number	Allows users to enter a number value.
Date	Allows users to enter a date.
User Defined Pick List	Allows users to select from a drop-down list of values. The list of values is defined when the custom field is created and is unique to that field.
Company Defined Pick List	Allows users to select from a drop-down list of values. The list of values is created in the Custom Field Pick List menu and may be shared across custom fields. For example, you may create a Custom Field Pick list with values of **Yes** and **No**. This pick list could be associated with multiple custom fields.
SAP Fieldglass Defined Pick List	Allows users to select from a SAP Fieldglass defined list, such as zip code.
Text Area	Allows users to enter text of up to 2000 characters.

To add a new custom field:

1. Click the **Admin** icon.
2. Click the **Custom Field** link in the **Configuration** section.
3. Click **New**.
4. In the **Module** field, select the module to which you want to add a custom field.

   Most suppliers can create custom fields in several modules. The modules available will be based on the buyer and supplier configurations.
5. Enter the requested information about the custom field. For more information, see “Custom Field Field Definitions”.
6. Click **Add** to save the new custom field.

Custom Field Field Definitions

Note: Fields marked with an asterisk (*) are required. They are outlined in red in the application.

Custom Field Field Definitions	
Field Name	**Description**
Module*	The module for which the custom field was created.
Name*	Enter a name for the custom field.
Description	Enter a description of the custom field.
Mandatory	Select the **Mandatory** check box if an entry should be required for this field.
Read Only	Select the **Read Only** check box if users should not be able to edit the value in the custom field. Typically, a read only custom field type has a default value assigned. This may be useful when you would like to

	have information available in SAP Fieldglass for reporting purposes, but do not want users to change the data.
Data Type	Select the appropriate data type for the custom field. Based on the Data Type selected, various options will be displayed.
Text	• **Default Value.** If desired, enter a value that should be automatically displayed in the field.
Number	• **Show Thousandths.** Select this check box if the value in this custom field should be shown to the thousandths place. • **Decimal Places**. Enter the number of decimal places to which this custom field should be stored. • **Default Value**. If desired, enter a value that should be automatically displayed in the field.
Date	• **Default Value.** If desired, enter a date that should be automatically displayed in the field.
User Defined Pick List	• **Validated Entry.** Select this check box if this custom field should ***not*** display a drop-down list. If the check box is selected, users will manually enter a value in the field, and the value entered will have to correctly match the value(s) established for the custom field. If the check box is not selected, a drop-down list will be displayed for the field and users will select values from the list. • **Values.** Enter the values to display in the drop-down list (or to be used for validation). Press **[Tab]** to add additional items to the list.
Company Defined Pick List	• **Pick List.** Select a pick list. If you select Company Defined Pick List, the pick list you want to use must be available for selection. To define a pick list, see “Creating a Custom Field Pick List” in this guide.
SAP Fieldglass Defined Pick List	• **Pick List.** Select from the list of SAP Fieldglass pre-defined pick lists.
Text Area	• **Default Value.** - If desired, enter a value that should be automatically displayed in the field.
Section	Depending on the module selected, several sections options may be available, including Details, Accounting, and Posting Information. This selection indicates which section of the document in which the custom field will be displayed.
Sequence	The sequence is the order in which the field will be displayed when multiple custom fields are included in the same section for the same module. Enter a number corresponding to the desired order of the fields (1, 2, 3, etc.).
Linked Modules	Select any modules to which the custom field should be linked. The modules available for linking will vary based on the module selected for the custom field.

Creating a Custom Field Pick List

Custom fields with a data type of Company Defined Pick List present a list of values that users can select from. Company defined pick lists can be used for more than one custom field. For example, you may have a pick list with “Yes” and “No” values that you use with multiple custom fields.

To add a new custom field pick list:

1. Click the **Admin** icon.
2. Click the **Custom Field Pick List** link in the **Configuration** section.
3. Click **New**.
4. Enter a **Name** for the pick list.
5. Enter **Values** as needed. The values entered will appear in the drop-down list for custom fields associated with this pick list. Click **Add Pick List Items** to add additional values to the list.
6. Click **Add**.
7. Use the **Remove** options as needed to remove the values in the list.

Managing Reason Codes

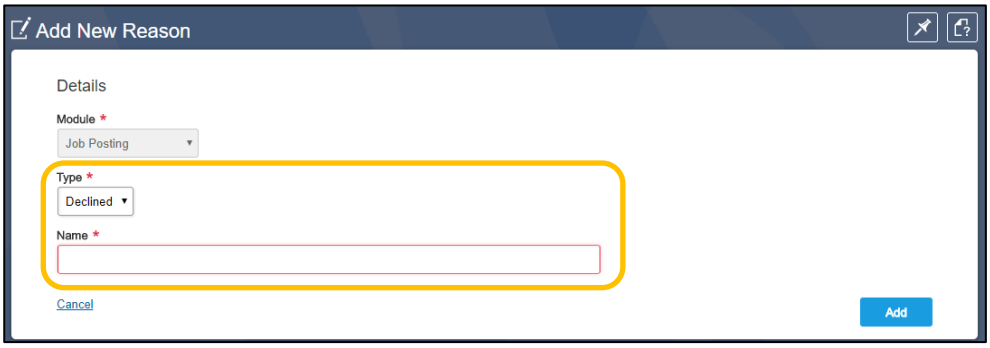
You can create a list of reason codes that users can select from in situations that require a reason code, such as when users decline a work orders or have a job seeker who has withdrawn. Supplier administrators must create reason codes, or users will not be able to perform some actions, such as declining a work order.

To add a new reason code:

1. Click the **Admin** icon.
2. Click the **Reason** link in the **Configuration** section.
3. Click **New**.
4. Select a **Module**.

   The module is the area of the SAP Fieldglass application to which the reason code is related. The choices available in the module field will depend on the buyer and supplier configuration. Options may include Job Posting, Job Seeker, Prequalify Workforce, RFX, RFX Response, Statement of Work, and Work Order.

When you have selected the module, the **Type** and **Name** fields will be displayed.



5. Select the **Type** of reason.

   Reason Types are based on the module selected. The choices listed are the actions that can be taken in that module that will require a reason. For example, the Job Posting module will include a type of "Decline" and the Job Seeker module will include a Type of "Withdrawn."

6. Enter a **Name** for the reason.

   The Reason Name is the value that will display in the list for users to select when they are completing the action in the application. For example, the name could be "Worker no longer available" or "Other."

7. To save the new reason, click **Add**.

   Note: When the user performs an action that requires a reason code, the reasons your company has defined will be available for selection. If none of the reasons are suitable, you can create a new reason for that instance of that action.

Adding Remit-to Addresses

Buyer companies may use the remit-to addresses defined in SAP Fieldglass to remit payments to your company. After they have been added, remit-to addresses can be associated to buyers. For more information, see "Associating Buyers with Remit-to Addresses" in this guide.

To add remit-to addresses:

1. Click the **Admin** icon.
2. Click the **Remit-to Address** link in the **Configuration** section.
3. Click **New**.
4. Complete all necessary fields.

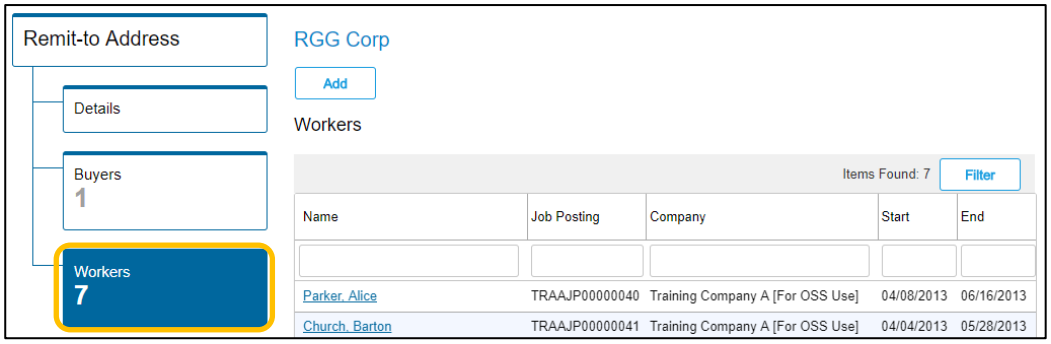
   The Code field is a unique identifier for this address. You can use a nickname for this address, the street address, or anything unique to this address.

5. Click **Add** to save the new remit-to address.

Associating Workers with Remit-to Addresses

Workers who are currently set up for the buyer company can be associated with a remit-to address so that payments for their invoices can be remitted to the address.

1. Click the **Admin** icon.
2. Click the **Remit-to Address** link in the **Configuration** section.
3. Click the Remit-to Address **Code** that you want to associate with workers.
4. Click the **Workers** link in the **Remit-to Address** section on the left side of the page. Any workers who are currently associated with the remit-to address are displayed.



5. To associate the remit-to address with a worker, click **Add**.
6. To search for the worker you want to associate with the remit-to address, enter the appropriate search criteria and click **Search**.
7. Select the check box(s) next to the workers who you want to associate with the remit-to address.
8. Click **Add**.

Managing Invoice Tax Information

Contingent labor and the services performed by a Managed Service Provider (MSP) are considered taxable under the tax laws of many countries. As such, invoices generated within the SAP Fieldglass system must meet the required guidelines to be considered valid for the purpose of obtaining tax credits.

To claim credits for taxes paid, it is imperative that the invoice a company receives be considered a valid tax invoice. Specific pieces of information must appear on the Invoice, which can vary from country to country. The required information can include items such as the VAT number, the address of the buyer/MSP/supplier, the country code, or a description of services.

The information that is needed for these invoices must be entered into SAP Fieldglass. When the information has been entered, you can associate the information to the specific buyer sites that require this data.

To add new invoice tax information:

1. Click the **Admin** icon.
2. Click the **Invoice Tax Information** link in the Configuration section.
3. Click **New**.
4. Enter the requested invoice tax information.
5. To save the new tax information, click **Add**.
6. Since not all sites are impacted by taxes, you must associate this invoice tax information to the appropriate buyer sites. Click the **Sites** menu on the left hand side.
7. Click **Add**.
8. To search for sites that you want to associate with the invoice tax information, enter your search criteria and click **Filter**. Buyers must flag sites that require invoice tax information. Use the **Invoice Tax Information Required** field to search for Sites flagged by the buyer as requiring this information.
9. Select the sites to which you want to associate the invoice tax information by selecting the check box next to each site.
10. Click **Associate**.
11. The **Invoice Tax Information: Associated Sites** page is displayed and the information is saved.

WORKFLOW

Introduction

The Workflow section of the **Admin** menu allows administrators to add and maintain activity items and set escalation thresholds.

In this Chapter

In this chapter, you will learn to:

- Manage escalation preferences
- Add activity items

Adding a New Set of Escalation Preferences:

1. Click the Admin icon.
2. Click the **Thresholds - Escalation** link in the **Workflow** section.
3. Click **New** at the top of the page.
4. Enter a **Name** and the desired **Threshold Times**.
5. Click **Add** to save the new preferences.

Associating Escalation Preferences to Business Units

1. Click the **Admin** icon.
2. Click the **Thresholds - Escalation** link in the **Workflow** section.
3. In the **Name** column, click the name of the escalation preferences you want to associate to business units.
4. Click the **Business Units** link under **Thresholds - Escalation** in the **Workflow** section on the left side of the page.
5. Click **Add**.
6. To search for sites that you want to associate with the escalation preference, enter your search criteria and click **Filter**.
7. Select the sites to which you want to associate the escalation preference by selecting the check box next to each site.
8. Click **Add**.

Adding Activity Items

Activity items are actionable tasks that are scheduled for a specified number of days before, on, or after a worker start or end date. After activity items have been created, they are used to create activity checklists. For more information, see “Creating Activity Checklists” in this guide.

Suppose that a worker must be evaluated three months after the worker’s start date. You can create an activity item that will alert the assigned user to evaluate the worker. The activity item will appear as a work item for the assigned user at the appropriate time.

You can create several types of activity items:

Activity Item Types	
Completion Type	**Description**
Add Form Attachment	The person assigned to complete this type of item must fill out a form that is attached to the activity item.
Complete Offboarding Task	The person assigned to complete this type of item must complete a task as described in the item.
Complete Onboarding Task	The person assigned to complete this type of item must complete a task as described in the item.
Edit Worker	The person assigned to complete this type of item must edit the worker record, as described in the item.
Revise Worker	The person assigned to complete this type of item must revise the work order, as described in the item.
View Website	The person assigned to complete this type of item must visit a website.
Worker Closed	The person assigned to complete this type of item must close the worker, as described in the item.

To create an activity item:

1. Click the **Admin** icon.
2. Click the **Activity Items** link in the **Workflow** section.

   Note: Offboarding activity items can no longer be newly created. Please use activity items to create new offboarding activities.
3. Click **New**.
4. Enter the requested information about the activity item. For more information, see “Activity Item Field Definitions”.
5. Click **Add** to save the activity item.

Activity Item Field Definitions

Note: Fields marked with an asterisk (*) are required. They are outlined in red in the application.

Activity Item Field Definitions	
Field Name	**Description**
Code*	Enter a **Code** that uniquely identifies this item.
Action*	Enter a short description of the item. The text entered here will be displayed to the user as the name of the item.
Description	Enter a description of the item, if desired.
Completion Type*	Select the appropriate **Completion Type** for the activity item. Depending on the completion type you select, additional fields may be displayed. For example, if you select **Form-Attachment**, you must attach a document in the **Attachments** section of the page.
Usage*	Specify whether this activity item should be **Optional** or **Mandatory**.
Actor*	Select the person who will be responsible for completing this activity item. Actors in parentheses are selected based on the value chosen. For example, if you select “(Job Posting Owner)”, SAP Fieldglass will select the individual listed in the Job Posting Owner field. If you select an actor without parentheses, you are selecting a user role. All users assigned to that user role will be notified of the item.
Due*	Specify when this activity item will be due.
Send Work Items*	Enter the number of days before the day that this item is due that the actor should be sent a notification.
Escalate*	Enter the number of days after the day that that this item is due that the item should be escalated if it is not complete.

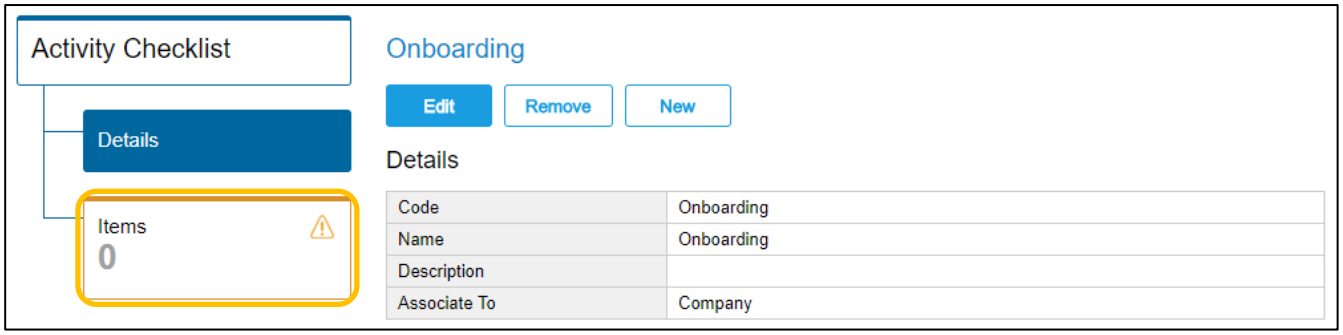
Adding Activity/Offboarding Activity Checklists

After activity items are created, they can be associated to checklists. Checklists are a group of activity or offboarding activity items. Checklists are then associated to a buyer, company, or labor type.

To create an activity checklist:

1. Click the **Admin** icon.
2. Click the **Activity Checklists** link in the **Workflow** section.

   Note: To create an offboarding activity checklist, select **Offboarding Activity Checklists**.
3. Click **New**.
4. Enter the requested information about the activity checklist. For more information, see “Activity and Offboarding Activity Checklist Field Definitions”.
5. Click **Add**.
6. Click the **Items** menu in the **Activity Checklists** section of the left-hand menu.



7. Click **Add**.
8. Search for the activity items that you want to associate with the activity checklist and click **Filter**.
9. Select the check box next to the items you want to add to the activity checklist.
10. Click **Add**.
11. If you selected **Buyer** or **Labor Type** in the **Associated To** field when you created the checklist, you must associate buyers or labor types using the same steps as above.

Activity and Offboarding Activity Checklist Field Definitions

Note: Fields marked with an asterisk (*) are required. They are outlined in red in the application.

Activity and Offboarding Activity Checklist Field Definitions	
Field Name	**Description**
Code*	Enter a code to uniquely identify the checklist.
Name*	Enter a name for the checklist. You can enter the same value for both Code and Name.
Description	Enter a description of the checklist.
Associate To*	Select an associate to option. • Select **Buyer** if the onboarding Items in the checklist should be initiated for every worker at that buyer. • Select **Company** if the onboarding Items in the checklist should be initiated for every worker for every buyer. • Select **Labor Type** if **t**he onboarding Items in the checklist will be initiated for a worker when the associated labor type is on the job posting.

INTEGRATIONS – TIME SHEET UPLOAD

Introduction

The Integrations menu is used to upload data into the SAP Fieldglass application, such as worker time. Using an upload, you can enter large sets of data and eliminate the need for manual entry of each item.

The time sheet upload is used by supplier administrators to batch-upload multiple time sheets into SAP Fieldglass. This process replaces the task of each worker submitting individual time sheets.

The general process for uploading time sheets is:

1. Download the draft time sheet file format from SAP Fieldglass.
2. Update the file.
3. Input the worker time sheet data into the file.
4. Upload the time sheet file into SAP Fieldglass.

These steps are described in this section.

In this Chapter

In this chapter, you will learn to:

- Download the draft time sheet file
- Prepare the file for uploading
- Upload the file

Downloading the DraftTimesheets.csv file

The first step in uploading workers' time is to download the DraftTimeSheets.csv file. The purpose of downloading this file is to retrieve the correct file format that is needed for the timesheet upload. The DraftTimeSheets.csv file is also pre-populated with key worker information and any custom fields that have been configured by the buyer. This information includes the job seeker ID and name, cost center, and rate information associated with the worker. This file is a comma separated value (csv) file. While you can open and edit the file in Microsoft Excel, you should always save the file as a .csv file.

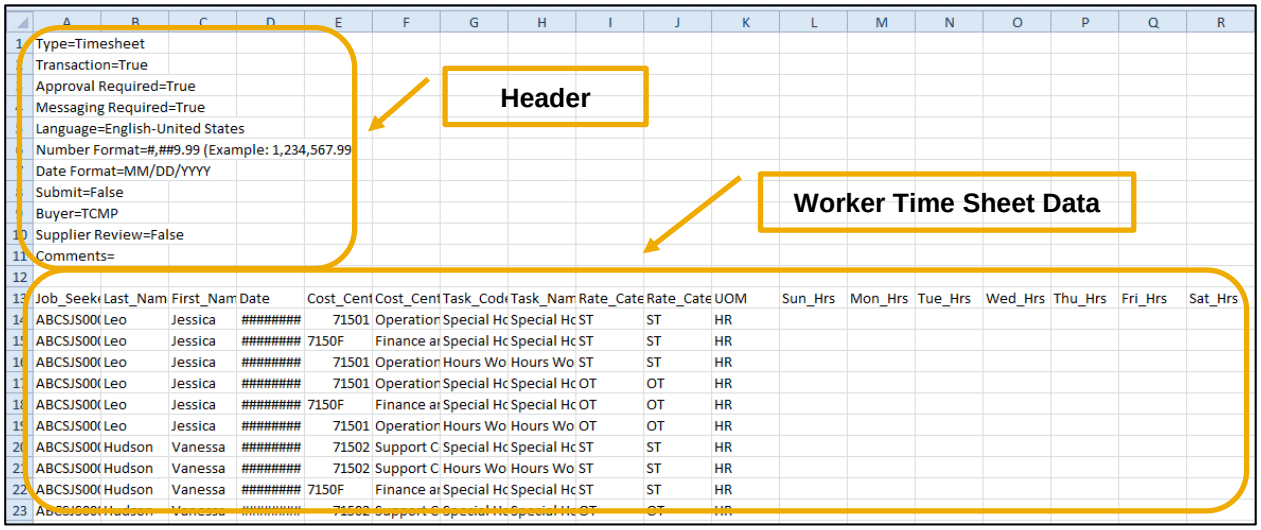
To download the time sheet file:

1. Click the **Admin** icon.
2. Click the **Download Draft/Rejected Time Sheets** link in the **Integration** section.
3. If you service more than one buyer, select the desired **Buyer**.
4. Enter or select the start date of the time sheet reporting week.
5. Click **Next**.
6. Select the **Cost Center(s)** for which you want to upload time sheets, or select the **All** check box to select all available cost centers. Hold down the **CTRL** key to select multiple cost centers.
7. Select the appropriate **Site(s)** or select the **All** check box to select all available sites.
8. Click **Download** and save the file to your computer. The file is a comma separated value (csv) file named DraftTimeSheets.csv.

Updating the DraftTimeSheets.csv File

The csv format is the only file format type recognized by SAP Fieldglass. Any other file format type will generate error messages when uploaded. Before you can upload workers' time, you must update certain information in the DraftTimeSheets.csv file.

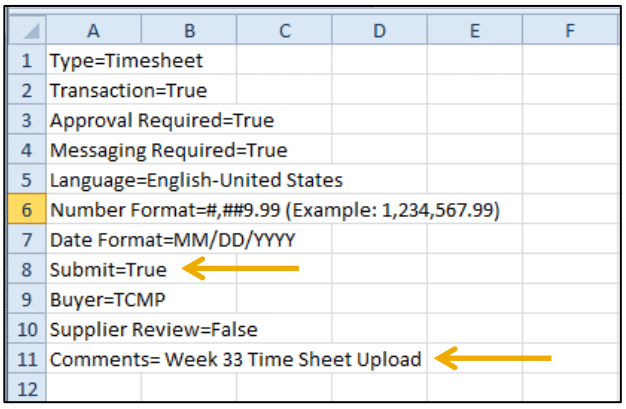
1. Locate the DraftTimeSheets.csv file on your computer and open it in Microsoft Excel.



2. The information in the file is divided into two sections: **Header** information and **Worker Time Sheet Data**. You must make two changes to the header information in order to accurately upload the file. You must also enter the timesheet data.

3. Change the header information as follows:

   - Change the **Submit** option to **True**. Changing this option ensures that you submit the time sheets rather than uploading them with a Draft status.
   - Enter information in the **Comments** field that will help you identify the file. For example, you could make an entry such as **Week 33 Time Sheet Upload**.

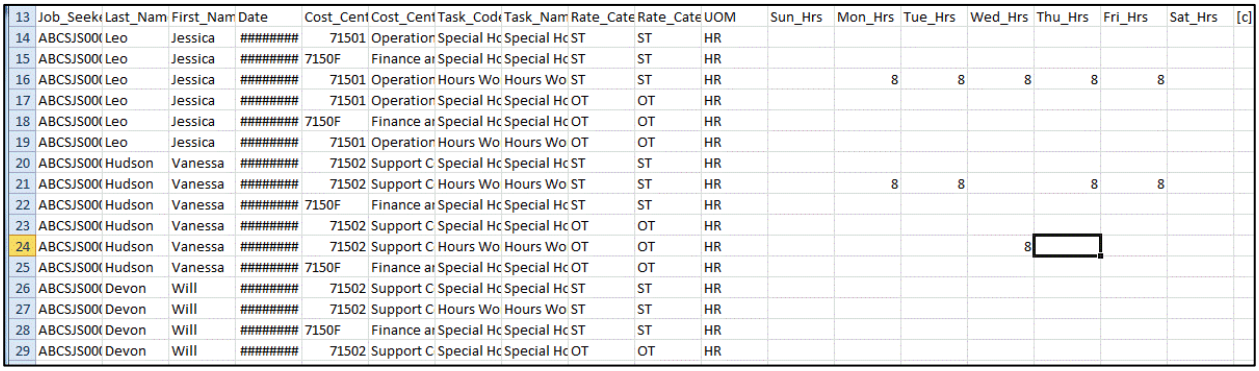


	A	B	C	D	E	F
1	Type=Timesheet					
2	Transaction=True					
3	Approval Required=True					
4	Messaging Required=True					
5	Language=English-United States					
6	Number Format=#,##9.99 (Example: 1,234,567.99)					
7	Date Format=MM/DD/YYYY					
8	Submit=True					
9	Buyer=TCMP					
10	Supplier Review=False					
11	Comments= Week 33 Time Sheet Upload					
12						

Note: Do not change any of the remaining fields in the Header.

4. Enter the worker time sheet data as follows:

   - Enter the hours per day in the appropriate columns.
   - Do not edit any of the pre-populated data. Only add the hours worked.
   - If multiple rate types have been assigned to the worker, the worker will appear on multiple rows in the spreadsheet. For example, each worker may have a Standard Time (ST) rate and an Overtime (OT) rate.
   - Workers may also appear on multiple rows if they can allocate time to more than one cost center or task code. Enter the appropriate hours for each rate type and cost center row.
   - Be attentive in entering hours worked to ensure that you properly submit Standard Time (ST) and Over Time (OT) rates, and that you entering time for the correct cost center and/or task code.
   - If the **Allow Time in Hundredths of Hours on Time Sheet** flag has been turned on for a worker, hours can be entered in 100th/hr increments, for example, 8.01, 8.02…..8.99.
   - Based on the buyer's configuration, columns for custom fields may appear after the day columns. Custom files will have a **[c]** before the column name. Enter data as requested by the buyer.



13	Job_Seek	Last_Nam	First_Nam	Date	Cost_Cent	Cost_Cent	Task_Cod	Task_Nam	Rate_Cate	Rate_Cate	UOM	Sun_Hrs	Mon_Hrs	Tue_Hrs	Wed_Hrs	Thu_Hrs	Fri_Hrs	Sat_Hrs	[c]
14	ABCSJS00(	Leo	Jessica	########	71501	Operation	Special Hc	Special Hc	ST	ST	HR								
15	ABCSJS00(	Leo	Jessica	########	7150F	Finance ai	Special Hc	Special Hc	ST	ST	HR								
16	ABCSJS00(	Leo	Jessica	########	71501	Operation	Hours Wo	Hours Wo	ST	ST	HR		8	8	8	8	8		
17	ABCSJS00(	Leo	Jessica	########	71501	Operation	Special Hc	Special Hc	OT	OT	HR								
18	ABCSJS00(	Leo	Jessica	########	7150F	Finance ai	Special Hc	Special Hc	OT	OT	HR								
19	ABCSJS00(	Leo	Jessica	########	71501	Operation	Hours Wo	Hours Wo	OT	OT	HR								
20	ABCSJS00(	Hudson	Vanessa	########	71502	Support C	Special Hc	Special Hc	ST	ST	HR								
21	ABCSJS00(	Hudson	Vanessa	########	71502	Support C	Hours Wo	Hours Wo	ST	ST	HR		8	8		8	8		
22	ABCSJS00(	Hudson	Vanessa	########	7150F	Finance ai	Special Hc	Special Hc	ST	ST	HR								
23	ABCSJS00(	Hudson	Vanessa	########	71502	Support C	Special Hc	Special Hc	OT	OT	HR								
24	ABCSJS00(	Hudson	Vanessa	########	71502	Support C	Hours Wo	Hours Wo	OT	OT	HR				8				
25	ABCSJS00(	Hudson	Vanessa	########	7150F	Finance ai	Special Hc	Special Hc	OT	OT	HR								
26	ABCSJS00(	Devon	Will	########	71502	Support C	Special Hc	Special Hc	ST	ST	HR								
27	ABCSJS00(	Devon	Will	########	71502	Support C	Hours Wo	Hours Wo	ST	ST	HR								
28	ABCSJS00(	Devon	Will	########	7150F	Finance ai	Special Hc	Special Hc	ST	ST	HR								
29	ABCSJS00(	Devon	Will	########	71502	Support C	Special Hc	Special Hc	OT	OT	HR								

5. When you have finished entering workers' time, save the file. The file should be saved as a csv file. **Do not save the file as an Excel file.**

   Note: You can change the file name to make it easier to locate in the future. For example, you may wish to add the date to the file name.

   If you upload the file without filling in hours worked for a particular time sheet, SAP Fieldglass will submit that time sheet with 0 hours worked. If you do not want to upload time sheets for all your workers, delete the ones you would like to process manually or at another time.

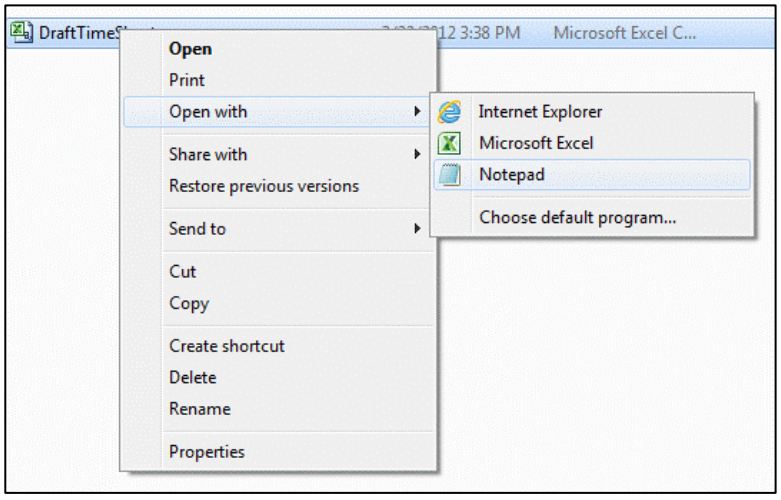
Preparing Files for Uploading

If you are using a version of Microsoft Excel older than 2010, (such as Excel 2007) you must follow the steps outlined below to prepare the file for uploading using Notepad. If you are using Excel 2010, you do not need to complete these steps and you may proceed to "Uploading Time Sheets" in this guide. If you are unsure of your Excel version, you should complete the steps below.

To prepare a file for uploading:

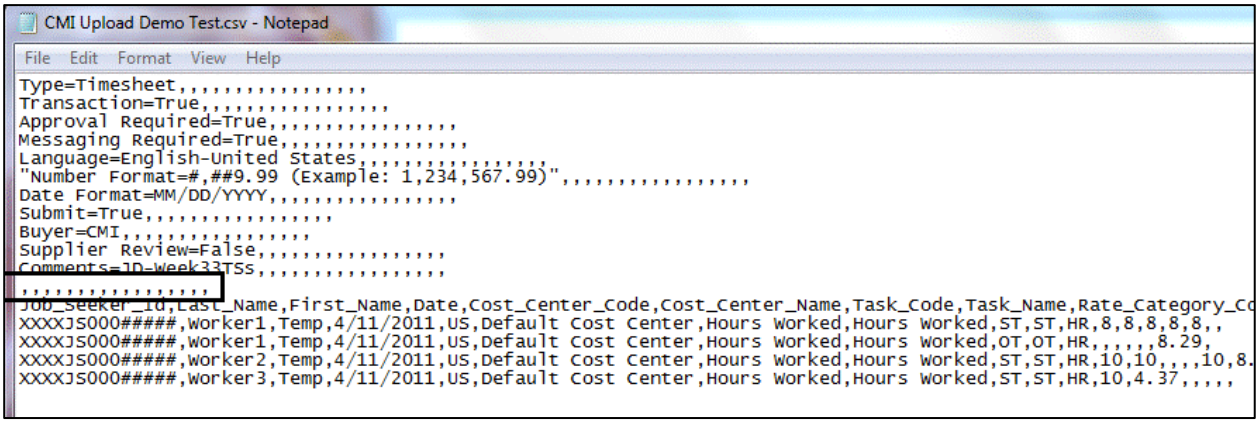
1. Locate the DraftTimeSheets.csv you into which you entered workers' time.
2. Right click the file name and select **Open with > Notepad**.

   The file opens in Notepad.



3. A row of commas appears below the **Comments** line, separating the Header information from the Time Sheet data. These commas must be deleted. Not removing these commas from the csv file may cause an upload error.

   If you are using Microsoft Excel 2010, the row of commas will not display. You can close the file (without saving) and do not need to complete the remaining steps.



4. After deleting the commas, select **File > Save As**.
5. Click **Save**. When the file has been closed, do not reopen the csv file. Reopening the csv file will cause the commas to reappear. If you must edit the csv file, reopen it and repeat these steps to remove the commas.

Uploading Time Sheets

When you have downloaded and updated the DraftTimeSheets.csv file, you are ready to upload the data into the SAP Fieldglass application.

To upload a time sheet file:

1. Click the **Admin** icon.
2. Click the **Upload Data** link in the **Integration** section.

   Note: If you do not see “Timesheet” in the active connector file format list, it is not enabled. Please contact the SAP Fieldglass Customer Support Team to request it.
3. Click **Browse**.
4. Locate and select the updated DraftTimeSheets.csv file.
5. Click **Upload**.

Checking the Integration Audit Trail

The Integration Audit Trail shows a history of upload and download activity conducted by your company's users. The audit trail allows you to see the status of your upload, and lists the errors, if any, in your file. To review the Integration Audit Trail:

1. Click the **Admin** icon.
2. Click the **Integration Audit Trail** link in the **Integration** section.
3. Select **Upload** in the **Activity** field**.**

4. Your upload will be listed as a row on the upper portion of the page. The most recent upload will be first in the list. SAP Fieldglass assigns a unique transaction ID to each upload. Review the Status of your upload:

    - In Process: SAP Fieldglass is processing the data. Continue to refresh the page (by clicking Filter) until the status changes. This process will take somewhere between a few seconds and a couple of minutes depending on the number of records being uploaded.
    - OK: The data has been uploaded and no errors were found.
    - Upload Data Error: SAP Fieldglass has processed the data and errors were found. No data has been uploaded. Click the Transaction ID for your upload and scroll down to Details section of the page. The Details section will list all the errors that SAP Fieldglass found. Review the errors and correct them on your DraftTimeSheets.csv file. You should edit the comments or file name (for example, FileName–v2.csv) before attempting to upload the file again. For a list of common errors and applicable corrections, refer to “Important Tips for the Time Sheet Upload” and “Troubleshooting Time Sheet Upload Errors,” below. If you are using a version of Microsoft Excel previous to Excel 2010, you will also need to use Notepad to update the file and remove the commas.

Important Tips for the Time Sheet Upload

- Draft Timesheet data is retrieved for one week at a time. After running the file download for the current week, you may want to run it again for several previous weeks to pick up any timesheets that were submitted late.
- Workers who have not been registered in SAP Fieldglass will not appear in the DraftTimeSheets.csv file. To make these workers appear in the file, contact the workers and ask them to complete the registration process.
- When using multiple upload files, do not split a worker’s time into separate upload files. If you do, you will be submitting the entire time sheet in the first upload file. When the first time sheet has been submitted, the time sheet status is changed from “Draft” to ‘Submitted” status and it is unavailable for the second upload file. Make sure all the time for a single worker on a single time sheet date is on one time sheet upload file. Also, when you use more than one spreadsheet for the same time sheet date, the header information for each spreadsheet should be exactly the same.
- Re-sorting the file can cause issues if the rows for an individual worker become ungrouped. The time sheet is submitted with the first group of records and since it is no longer in “Draft” status it becomes unavailable for any later rows.
- If the same file has time sheets for multiple dates, the earlier time sheets should be processed first.

Troubleshooting Time Sheet Upload Errors

Time Sheet Upload Errors		
Error Message	**Description**	**Common Troubleshooting**
Required data is missing for Job_Seeker_Id	A value is not entered for Job_Seeker_Id.	The Job Seeker ID defaults when you download the DraftTimeSheet.csv file. Do not edit this information.
Invalid Job_Seeker_ID.	No worker exists for the Job_Seeker_Id specified.	The Job Seeker ID defaults when you download the DraftTimeSheet.csv file. Do not edit this information.
Time Sheet not available for this date.	No time sheet is available for the specified date.	Is there a valid work order for the time sheet dates loaded or a Draft time sheet within SAP Fieldglass? If time sheets are 8-10 weeks old or older, they may need to be "pushed." Administrators can push a time sheet by going to Admin -> System Tools -> Push Time sheet.
Time Sheet should be in DRAFT or Rejected Status.	The status of the time sheet specified is not in Draft or Rejected status.	What is the status of the current time sheet in SAP Fieldglass? Timesheets must be in Draft or Rejected and cannot be Invoiced or Pending Approval, etc. If it has already been invoiced, you do not need to upload the time sheet.
Required data is missing for Date	The Time Sheet Start Date (a required field) is not entered.	Has the time sheet start date been included in the upload file for each line item? The start date defaults when you download the DraftTimeSheet.csv file. Do not edit this information.
Date has invalid values	Date Format specified in Header of upload file does not match with the value entered for Date.	Does the format in the Header of the upload document match what is entered for the time sheet date? For example, a MM/DD/YYYY time sheet date should be 01/20/2014.

Required data is missing for Cost_Center_Code	The Cost Center Code (a required field) is not entered.	Has the Charge To Cost Center Code been entered for each line item within the upload document and is it accurate? The Cost Center Code defaults when you download the DraftTimeSheet.csv file. Do not edit this information.
Invalid Cost Center Code.	Cost Center Code entered doesn't exist.	Has the Charge to Cost Center code been verified as a valid entry?
Cost Center not valid for the specified Worker.	Cost Center Code entered does not belong to specified Worker.	Is the contractor associated with the entered Charge to Cost Center Code?
Required data is missing for Task_Code.	The Task Code (a required field) is not entered.	Has the Task Code been entered for each line item within the upload and is it accurate? The Task Code defaults when you download the DraftTimeSheet.csv file. Do not edit this information.
Invalid Task Code or Cost Center - Task Code combination is Invalid.	Task Code entered does not exist or Cost Center-Task Code combination is invalid.	Have both the Charge to Cost Center Code and the Task Code been verified and entered correctly for the specified contractor?
UOM is not correct for Job Seeker: XYZAJS00001116.	There is a mismatch in Unit Of Measure. For example, if Job Seeker XYZAJS00001116 has UOM Day and UOM for the Time Sheet is HR.	Has the UOM been verified for the contractor? If a contractor is only on a Day rate, you may not enter the time sheet as Hourly.
Required data is missing for UOM.	The Unit of Measure (a required field) is not entered.	The UOM defaults when you download the DraftTimeSheet.csv file. Do not delete this information.
Required data is missing for Rate Category Code.	The Rate Category Code (a required field) is not entered.	Is the upload file missing any entries for Rate Category Code? Each line item must specify the type of rate, such as ST, DT etc.
Rate Category Code not valid for the specified Worker.	Worker's Rate Category Code doesn't match the Rate Category Code entered.	Has the Rate Category Code used in the upload been associated with the contractor in SAP Fieldglass? If a contractor has not been associated to a DT rate, this category code cannot be used with the contractor’s time sheet.

Rate Category is not associated to the specified Rate Unit.	No rates exist for the specified Rate Category and Rate Unit combination.	Is the Rate Category associated correctly with the Unit of Measure? If a category of DT was entered, but DT is only associated with Hourly rather than Day rates, the Rate Code until must be Hourly.
Fri_Hrs must be between 0 and 24 Hours.	The hours entered are not between 0 and 24. For example, the value for 'Fri_Hrs' is entered as 45.	Have the hours entered for each day been verified within the upload? The amount entered cannot exceed 24.
Invalid values for Mon_Hrs,Tue_Hrs.	If the values entered for Mon_Hrs, Tue_Hrs, Wed_Hrs, Thu_Hrs, Fri_Hrs, Sat_Hrs, Sun_Hrs is not Numeric or in the Number Format specified in Header of upload file the upload will error.	Have the hours within the upload file been verified? Have they been created in a numeric format? The system will not accept letters in these fields.
No Hours entered, Time Sheet cannot be submitted.	No hours are entered on the Time Sheet.	Have hours been entered in the time sheet upload file? Entries must be between 0 and 24.
The End Date on your Work Order is 1/1/2014. You can not specify time beyond this date.	You cannot enter time for a date after the worker's work order end date.	Have the work order dates been verified for the contactor? If the work order ends on a Wednesday, the time sheet hours entered cannot include Thursday or Friday. The work order can be extended through a work order revision.
The Start Date on your Work Order is 12/01/2011. You can not specify time before this date.	You cannot enter time for a date before the worker's work order start date.'	Have the work order dates been verified for the contactor? If the work order begins on a Wednesday, the time sheet hours entered may not include Monday or Tuesday.
Cannot enter time against two daily rates on same day.	The user has entered time against two daily rates on same day. For example, you cannot enter rates for ST/ HR and ST/Day on same day.	Does the worker have two accounts? Are the correct hours being associated to the correct worker account?
Timesheet can only be uploaded if they are in sequence.	The dates for timesheets are not in sequence.	Have the time sheets entered on the time sheet upload been created in order of start date?
Mandatory Custom Fields missing in file:Entered by Buyer	A custom field is mandatory and data has not been entered.	Are there any required custom fields for the upload that have not been entered?

REPORT/GRAPH

Introduction

Administrators with the appropriate user role permissions can add or update report categories. Categories are assigned to specific reports and associated to user roles. Users will only be able to view and run reports in categories associated with their user role.

In this Chapter

In this chapter, you will learn to:

- Manage report categories
- View the report audit list

Adding Report Categories

Seven report/graph categories are included in SAP Fieldglass - Historical Data, Performance, Services, Spend, Status, Summary, and Worker. Administrators can add additional report categories and assign them to specific reports.

1. Click the **Admin** icon.
2. Click the **Report Category** link in the **Report** section.
3. To view the reports and user roles associated with a category, click the **Name** of the desired category.
4. To add a new category, click **New**.
5. Enter a **Name** and **Description** for the new Category.
6. Click **Add**.
7. Use the menus on the left side of the page to make the desired associations.

   Note: The Administrator user role is automatically associated to the new report/graph category.

Editing Predefined Report Names and Categories

SAP Fieldglass provides standard reports for use by suppliers. Each SAP Fieldglass standard report is associated to one of the default report categories. Administrators can change the name of a SAP Fieldglass standard report and edit the report category association.

1. Click the **Admin** icon.
2. Click the **Predefined Report** link in the **Report** section.
3. Click the name of the desired report/graph by in the **Original Name** column.

4. Click **Edit**.
5. In the **New** column, update the **Report Name** and select a new **Report Category**. If you wish, you can enter a new report description.
6. To use your new information, select the associated radio buttons in the **New** column.
7. Click **Update**.

   Note: If you change the Report Category, you should also review the user roles that are associated with the new category you selected to ensure the desired user visibility. Users in roles not associated to the new category will not be able to view the report.

Viewing the Report Audit Trail

The report audit trail allows administrators to search for reports executed in SAP Fieldglass. The user, output format, and date/time are also displayed.

1. Click the **Admin** icon.
2. Click the **Report Audit Trail** link in the **Report** section.
3. Use the **Period** filter and the search fields on the page to search for the report whose audit trail you want to view. Click **Filter**.
4. The page shows the user who executed the report, the report name, the output format, and the time the report was run.
5. To display the report, click the name of the report in the **Report Name** column.

SYSTEM TOOLS

Introduction

Administrators with the appropriate user role permissions have access to System Tools. System tools allow administrators to view the audit trail, view system notifications, and view and act on work items.

In this Chapter

In this chapter, you will learn to:

- Work with the system audit trail
- View all notifications
- View all work items

System Audit Trail

The System Audit Trail is a tool in the SAP Fieldglass application that allows you to view a chronological list of activities performed in the system, such as user log in attempts and data edits. This helps to provide visibility and accountability for all actions and makes it easier to find and review how procedures were completed.

1. Click the **Admin** icon.
2. Click the **System Audit Trail** link in the **System Tools** section.
3. Use the filter and search options on the page to enter search criteria. For example, you could search for a specific user's log in attempts on a given date.
4. Click **Filter**.

   The Audit Trail page shows audit trail entries based on the search criteria you specified.
   Note: You should enter or select detailed search and filter options. Making your search to broad may return thousands of records.

Viewing all Notifications

The **View All Notifications** menu lists notifications sent within the past 10 days for your Supplier company.

1. Click the **Admin** icon.
2. Click the **View all Notifications** link in the **System Tools** section.
3. Review the notifications. You can use the search fields to narrow the list of notifications.

Viewing all Work Items

The **View All Work Items** menu lists every active work Item within your Supplier company. An Administrator is able to take action on an item on behalf of another User. The **Approvals / Audit Trail** tab of the item will display the original recipient, and that the Administrator completed the action.

1. Click the **Admin** icon.
2. Click the **View all Work Items** link in the **System Tools** section.
3. Use the **Recipient** and **Action** lists to search for work items for a specific user or for a specific action. For example, you could search for all Job Posting Respond work items for a particular user and take action on those items. You can also use the search fields to narrow your results.
4. Select a work item on which you want to take action on a user's behalf.
5. Click the appropriate action (such as **Submit New**, **Submit Existing**, or **Decline**) on in the lower part of the page.

REPORTS

Introduction

Many predefined reports are available in the SAP Fieldglass application. If you do not see a report that fills your needs, users with appropriate user role permissions can create custom reports. User access to specific and reports can be controlled by SAP Fieldglass supplier administrators.

In this Chapter

In this chapter, you will learn to:

- Run a predefined report

Running a Predefined Report

To run one of the SAP Fieldglass predefined reports:

1. Click the **Analytics** menu and select **All Reports**.
2. Click a report **Name**.
3. Scroll through the report options and make all required selections. The report options displayed will vary based on the specific report selected.
4. Select the report **Output Format**.
5. Click **Run**.

   The report will be displayed in the selected format.

   Note: Depending on your internet browser (for example, Microsoft Internet Explorer®, Mozilla Firefox®, or Google Chrome™) you may be prompted to download or save the report before you can open it.

SAP Fieldglass Supplier Standard Report List

The following table provides a list of the standard SAP Fieldglass supplier reports. User visibility to reports is controlled by the supplier administrator, therefore users may not have access to all reports listed below.

Supplier Standard Reports	
Report Name	**Description**
Draft Time Sheets	This report lists all time sheets that are in a draft status.
Expense Sheet Status	This report lists all expense sheets within a Submit Date range.
Invoice Details	This report provides the details (amounts) of each invoice.
Invoice Status	This report provides the status of each invoice in the system and the invoice amount.
Job Posting Status	This report shows general job posting information. It can be filtered by submit date, status, and site.

Job Seeker Status	This report provides the status of each job seeker in the system.
My Performance	This report provides information about job postings received and responded to. It includes the number of candidates shortlisted, rejected, and hired, fulfillment ratio, and response days.
System Users	This report gives a listing of all users in the supplier company account.
Time Sheet Status	This report shows the status of each time sheet. Draft time sheets are not shown on this report.
User Role Permissions	This report shows the user roles that have been created, as well as the permissions assigned to each role.
Work Order Status	This report provides the status of all work orders.
Worker Status	This report provides the status of all workers.

APPENDIX A: SUPPLIER ADMINISTRATOR GO-LIVE CHECKLIST

Supplier administrators are responsible for completing tasks to ensure the successful launch of the SAP Fieldglass application to support their buyer organizations. Specific tasks and procedures will vary based on the buyer's configuration of SAP Fieldglass; however, the following items are typically completed by supplier administrators:

Action	Notes
Register/Create your Supplier Admin user account	When you have been invited by the buyer and signed the SAP Fieldglass EUA, your registration email will be sent. Use this email to create your supplier admin account.
Create User Roles	User roles define the permissions a user will have in the SAP Fieldglass application. You are not required to create additional user roles, however, if you do not, all new users will be system administrators.
Create Users	Add the additional users for your organization.
Create Reason Codes	Reason codes must be added before users can complete various transactions in SAP Fieldglass, such as declining a job posting.
Create Accounts	If desired, create additional accounts. Accounts allow you to control user visibility. If you are using accounts, you must also associate the desired buyer sites and users to the new accounts.
Review and Update Account Manager and Site associations	Every buyer site your organization services must have an account manager assigned. By default, the account manager assigned to every buyer site is the first supplier administrator user created. After adding additional users, you can update the account manager for specific Sites using the buyer menu.

SAP Fieldglass

www.fieldglass.com/contact

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