SAP Fieldglass Services User Guide

Reference Guide for Small Suppliers
Individual or small firm/organization with 8 or fewer W-2 employees. Also known as Freelancers or Independent Contractors.

December 2022
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FIELDGLASS SUPPORT

McGraw Hill utilizes **Managed Services Provider (MSP) AgileOne** to manage the all temporary and freelance workers within McGraw Hill. AgileOne provides a dedicated team accessible to all McGraw Hill users, including Independent Contractors/Freelances, Temporary Workers, and McGraw Hill Managers.

AgileOne utilizes **online software** to manage all activity related to all freelance and temporary labor. The **Fieldglass** system is made available to any user who is using or providing services or labor to McGraw Hill.

The AgileOne onsite team is available 8:00am – 5:00pm Central time. Contact the AgileOne onsite team via email: contractor.ts@mheducation.com

<table>
<thead>
<tr>
<th>Problem</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password Reset</td>
<td>Fieldglass Help Desk</td>
</tr>
<tr>
<td></td>
<td>Email: <a href="mailto:fieldglasshelp@sap.com">fieldglasshelp@sap.com</a></td>
</tr>
<tr>
<td></td>
<td>Phone: 866-467-4833</td>
</tr>
<tr>
<td>Invoice Submittal</td>
<td>AgileOne Onsite Team</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:Contractor.TS@mheducation.com">Contractor.TS@mheducation.com</a></td>
</tr>
<tr>
<td>Confirm Payment Method</td>
<td>AgileOne Onsite Team</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:Contractor.TS@mheducation.com">Contractor.TS@mheducation.com</a></td>
</tr>
<tr>
<td>Changes to Payment Method</td>
<td>AgileOne Onsite Team</td>
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<tr>
<td></td>
<td><a href="mailto:Contractor.TS@mheducation.com">Contractor.TS@mheducation.com</a></td>
</tr>
<tr>
<td>Physical Address Update</td>
<td>AgileOne Onsite Team</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:Contractor.TS@mheducation.com">Contractor.TS@mheducation.com</a></td>
</tr>
</tbody>
</table>

ACCESSING FIELDGLASS

A **Supplier Registration** email will be sent to the email address provided.

1. After reviewing the message, select **Click Here** to be directed to the Fieldglass registration.

2. Complete all mandatory fields including **Address**, **Username**, **Password**, and **Secret Question**. Click **Next**.

3. Complete the End User Agreement, then select **Accept and Continue**.
User accounts for additional users within your company can be created from the Admin menu.

1. Click Admin.

2. Select User from the User menu section.

3. Click New.

   **IMPORTANT**: When a new user is created, the Admin user is prompted for the user’s supervisor, which is required. Therefore, it is required to add users in a “top down” fashion, so upper-level supervisors are added first. Alternately, the SAP Fieldglass Administrator can be selected as the supervisor for all users and update this information later.

4. Complete the form, then click Add. The new user will receive a registration email from Fieldglass.

**LOGGING IN TO FIELDGLASS**

Users sign in to Fieldglass directly from their internet browser.

1. Navigate to **www.fieldglass.net**

2. Enter the **Username** and **Password**.
   
   **Note**: If you have forgotten your username or password, click **Need help signing in?** for assistance.

3. Click **Sign In**. The landing page is the Dashboard.

**BASIC NAVIGATION**

1. At the top of the screen, the system displays the initials of the current user. If a user has linked accounts or is a delegate for another user, clicking on the initials will display linked accounts. If there are no accounts linked, clicking the user’s name will only display the profile and preferences options.

2. The menu bar provides access to the various functions within 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 Fieldglass logo at any time to return to the Fieldglass home page.

3. Work Items are transactions that require action in Fieldglass. Click the Work Items menu to view all active work items for your user account. Messages are another way to view alerts/notifications that the Fieldglass tool will automatically send out to managers tracking various activities within the tool.

4. Companies may display a customized announcement on the Home page. Announcements may be visible to buyer users, supplier users, or to workers.

*Menus*

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

<table>
<thead>
<tr>
<th>Fieldglass Menus</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Item</strong></td>
</tr>
<tr>
<td>Home</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>Create</td>
</tr>
<tr>
<td>Analytics</td>
</tr>
<tr>
<td>Work Items</td>
</tr>
<tr>
<td>Message Center</td>
</tr>
<tr>
<td>Admin</td>
</tr>
<tr>
<td>Help</td>
</tr>
<tr>
<td>Settings</td>
</tr>
</tbody>
</table>
Tabs

Tabs are used when viewing a Statement of Work to group related information. Click each tab to view additional information about the document.

<table>
<thead>
<tr>
<th>Tab Label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td>The tab contains the <strong>description</strong> of the project, the <strong>total budget</strong> summary, and the attachment that contains the <strong>signed SOW</strong>.</td>
</tr>
<tr>
<td></td>
<td>The signed SOW can be downloaded as many times as necessary. Upon revision, a new attachment will appear in addition to the original.</td>
</tr>
<tr>
<td>Manage</td>
<td>This tab contains activity items related to the document generation. <strong>No action</strong> is needed from you on this tab.</td>
</tr>
<tr>
<td>Clauses</td>
<td>This tab contains the <strong>legal clauses</strong> agreed to upon signature of the Statement of Work.</td>
</tr>
<tr>
<td></td>
<td>The clauses viewed here are the same as those in the document attached in the <strong>Details</strong> tab.</td>
</tr>
<tr>
<td>Deliverables/Milestones, Due Date &amp; Fees</td>
<td>This tab contains the list of individual Milestones/Deliverables (Fees) associated with the project. The <strong>Fee detail</strong> can be viewed by clicking on the Name of the Fee.</td>
</tr>
<tr>
<td></td>
<td>This tab also contains the list of <strong>Invoices</strong> already charged to the SOW and the Invoice status.</td>
</tr>
<tr>
<td>Related</td>
<td>This tab contains the list of items that are related to this Statement of Work. Typically, only the <strong>invoices</strong> charged against the Statement of Work will appear in this tab.</td>
</tr>
</tbody>
</table>
GETTING STARTED

Changing Password

Your Fieldglass password can be updated at any time.

1. Click on the initials icon in the top right of the page. Select My Profile. The Personal Settings page will open, with the My Profile tab displayed.

2. Click Change Password in the Account Information section. The Change Password dialog box is displayed.

3. Enter new password information, then click Change.

Updating Contact Information

You can change your Fieldglass contact email address and set up a list of email addresses to be included in the Cc: field of all email notifications sent from Fieldglass.

1. Click on the people icon in the top right of the page. Select My Profile. The Personal Settings page will open, with the My Profile tab displayed.

2. Click Edit in the section where your name is displayed. The My Profile – Basic Information page is displayed.

3. In the Email field, enter the email address where all email notifications from Fieldglass should be sent.

4. In the Cc: Email Addresses field, enter any email addresses that should be included in the Cc: field of all Fieldglass notifications. Separate each address with a comma or a semicolon.

5. Click Update to save your changes.

Updating Fieldglass Preferences – Notification Emails

1. Click on the people icon in the top right of the page. Select My Preferences. The Personal Settings page will open, with the My Preferences tab displayed.

2. Click Edit to the right of Locale to change time zone.

3. Scroll down to Messaging section. Click Edit.

4. On the My Preferences – Messaging page, you may indicate whether you want Notification, Work Item, Alert, Broadcast, Chat (Contingent), Chat (services) or Starred messages sent to your email address.

Updating Proxy Information

A proxy is an individual who can act on a User’s behalf in the Fieldglass system when the User is unavailable to do so.
1. Click on the people icon in the top right of the page. Select My Profile. The Personal Settings page will open, with the My Profile tab displayed.

2. Scroll to the Proxy section, then click Edit.

3. To add a new Proxy, click Add Proxy. The Add Proxy dialog box is displayed.

4. Enter the requested information, then click Add.

<table>
<thead>
<tr>
<th>Add Proxy Field Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Field</strong></td>
</tr>
<tr>
<td>Work Items</td>
</tr>
<tr>
<td>Proxy</td>
</tr>
<tr>
<td>Start Date End Date</td>
</tr>
</tbody>
</table>

5. To change any existing Proxy information, click Edit. To remove an existing proxy, click Remove.

**COLLABORATION**

Collaboration is the process wherein the Supplier and the McGraw Hill project contact can review the Statement of Work and negotiate pricing and/or Milestones/Deliverables and Due Dates. Fieldglass allows the Statement of Work to pass between the two parties as many times as necessary to come to agreement.

Contract clauses cannot be negotiated in Fieldglass. If the Supplier requires a change in the legal language of the clauses, the McGraw Hill project contact will engage the internal McGraw Hill Contract Management team for guidance.

*Note: Negotiating the clauses of the contract will increase the turnaround time for completing the transaction.*
Reviewing a Statement of Work

1. Login to Fieldglass

2. Select Work Items then Statement of Work – Review.

3. Click on the Statement of Work ID to be reviewed.

4. Select Respond to review the SOW and to negotiate Deliverables/Milestones, Due Dates or Fees. Click the edit icon to make changes to the items.

   Suppliers may also add a reference number, change the primary contact, and add any comments to the Buyer.

   If the Supplier opts to negotiate Deliverables/Milestones, Due Dates or Fees, it is strongly recommended that the supplier detail those changes in a comment to the Buyer. The comments create a record of the negotiation between parties for both to reference at a later date.

5. When review is complete, click Continue, then Submit.

The Buyer will review and either Accept or return to the Supplier for additional negotiation. After both parties are satisfied with the terms of the Statement of Work, the Buyer will forward the Statement of Work internally for approval.

ACCEPTING A STATEMENT OF WORK

After all internal non-financial approval is complete, the Statement of Work will be submitted to the Supplier for final review and acceptance. There is no additional negotiation at this stage.

1. Select Work Items, then Statement of Work – Accept OR

   Select View, then Statement of Work.

2. Click on the Statement of Work ID to be reviewed.

3. Click Accept or Decline as appropriate.

   a. If Declined, the Supplier will be required to provide a reason for declining.

4. A confirmation that the Statement of Work has been successfully submitted will display in a green ribbon on the Summary page.

Accepting a Statement of Work does not indicate approval to begin work or invoicing. After acceptance, McGraw Hill will then secure the financial approval necessary to ensure the funds for the project are available.

Statements of Work valued at $100,000 or more will require a DocuSign process to be completed before invoicing can occur.

Fieldglass will send an approval notification via email confirming when all necessary approvals have been
completed and alerting the Supplier that work may begin. The status of the SOW in Fieldglass will be updated to Approved upon release for invoicing.

**STATEMENT OF WORK REVISIONS**

In the event that a revision is required for an existing Statement of Work, the revision will be reviewed in a similar manner to the original acceptance.

After all internal non-financial approval is complete, the Statement of Work Revision will be submitted to the Supplier for final review and acceptance. There is no additional negotiation at this stage.

1. Select Work Items, then Statement of Work Revision – Accept OR
   Select View, then Statement of Work.
2. Click on the Statement of Work ID to be reviewed.
3. Click Accept or Decline as appropriate.
   a. If Declined, the Supplier will be required to provide a reason for declining.
4. A confirmation that the Statement of Work Revision has been successfully submitted will display in a green ribbon on the Summary page.

**RETRIEVING STATEMENT OF WORK CLAUSES (CONTRACT)**

After all necessary approvals and signatures are completed, Fieldglass will automatically create a .pdf document containing the terms, deliverables/milestones, due dates, and fees, and the electronic signatures of McGraw Hill and the Supplier.

This document will be re-issued upon revision of the Statement of Work. The original document will remain available for download.

1. Login to Fieldglass
2. Select View then Statement of Work.
3. Click the Statement of Work ID desired. The Statement of Work will open on the Details page.
4. Scroll to the bottom of the page.
5. Under the Attachments header is a link to download the Statement of Work contract.
INVOICING

- Creating an invoice is known as creating a **Deliverable/Milestone or Fee**.

- **Fees** can be generated for all or a partial amount of **Units**. If a partial amount is billed, additional invoices (Fees) can be submitted up to the maximum amount allowed in the SOW.
  
  o **Example**: The SOW has 100 available **Units**. You may invoice for all 100 units as one Fee, or you may invoice 4 **Fees** of 25 units each.

- Effective October 2020, a 2.2% administrative fee will be applied to all invoices processed in Fieldglass. This fee will be deducted from the total invoice amount before payment is issued to the Supplier.

**NOTE**: The document located [here](#) contains additional detail for submitting Fieldglass invoices.

**Deliverable/Milestone or Fee Creation**

1. Login to Fieldglass.

2. Select **View** then **Statement of Work**. The list of SOWs associated to the logged in supplier will be listed.

   Items that are in the status **Approved** are active and ready for Fee creation.

3. Click on the **Statement of Work ID** for the item to be viewed. The **SOW ID** is a 12-digit code that begins with MHETQ (MHETQXXXXXXXX).

   **Note**: The dates in the **Period** fields can be ignored. Fieldglass auto-populates these fields based on your active SOWs.

4. Click **Actions**. A menu will load.

5. Select **Create Milestone/Deliverable or Fee**.

6. Enter the **Effective Date** of your invoice.

7. Select **Add Deliverable/Milestone or Fee**.

8. From the drop-down menu that appears, select the item to which the Fee is being charged.

9. Enter the **Description** of the services performed.

10. Enter the number of **Units** to be charged. To confirm the total dollar amount being charged, click **Calculate Deliverable/Milestone or Fee Amount**.

11. Click **Continue**.

12. Review the displayed information. If correct, select **Submit**. If changes are necessary, click **Make Changes**.
Invoice Revisions

In the event an invoice has been submitted and approved with an error, Suppliers may create a Revision to amend the invoice to reflect the proper amount.

1. Login to Fieldglass.
2. Select View, then Statement of Work.
3. Click on the SOW ID number to view details.
4. Select the Milestones/Deliverables, Due Dates & Fees tab.
5. Filter the table to view only items that have been Invoiced.
6. Click on the Name of the item which requires changes.
7. Click Edit, then Revise.
8. Update the value of the invoice to the correct amount or update the Fee it has been allocated to.
9. Click Continue, review the information, then Submit.

REASON CODES

Reason codes are used in Fieldglass when declining or rejecting items assigned to the Supplier user. Reason codes are generated by the Supplier Admin user and can be updated at any time.

1. Login to Fieldglass
2. Select the Admin icon.
3. From the Admin menu, select Reason under the Configuration heading.
4. Click New.
5. Select the module the Reason will be applied to. Example: Statement of Work, Invitation.
6. Confirm the Type. Items can be Withdrawn and Declined, dependent on the function.
7. Enter the Reason Code, then click Add.

Additional Reason Codes can be input using steps 4 through 7.

ANALYTICS

Fieldglass contains a reporting function available to all Suppliers. There are several pre-defined reports that can be run to analyze the Statements of Work and their history.

To run a pre-defined report:

1. After logging in, select Analytics then All Reports.
2. Click the desired report Name.
3. Review the Filter options and update to desired settings.

4. Select the report Output Format.

5. Click **Run**. The report will be automatically generated in the selected format. Depending on the internet browser being used and its associated settings, users may be prompted to download or save the report, or the item may be automatically downloaded.