Ohio University
Quick Reference Guide
SAP Fieldglass
InGenesis MSP Program
# TABLE OF CONTENTS

- Register Your SAP FieldGlass User Account .......................................................... 3
- Sign In To SAP FieldGlass ..................................................................................... 3
- Customize Your SAP FieldGlass Home Page ....................................................... 4
- Edit My Profile And My Preferences ................................................................... 4
- View Work Items ................................................................................................... 5
- How To Create A Job Posting ................................................................................ 5
- How To Review A Worker ..................................................................................... 12
- How To Hire A Worker ....................................................................................... 12
- How To Modify A Work Order .............................................................................. 15
- Modify Task And Expense Codes ....................................................................... 16
- View A Transaction’s Status ............................................................................... 17
- View/Approve/Reject Timesheets ......................................................................... 19
- Close A Worker .................................................................................................... 19
- Run Reports ......................................................................................................... 19
- Get Help ............................................................................................................... 19
REGISTER YOUR SAP FIELDGLASS USER ACCOUNT

Before you log into the SAP Fieldglass application, you must register your user account. You will receive an email when your system administrator creates your account. The email will contain a registration code and a link to the SAP Fieldglass registration page.

1. Copy the registration code from the first email.
2. Click the Click here link in the email to open the registration page.

3. Paste the temporary registration code from the first email into the Registration Code field and click Next.
4. Create a Username and Password. Depending on how your company is set up, you may not be able to make changes to your username.
5. Click Sign In.

SIGN IN TO SAP FIELDGLASS

After you have registered your account, you can log directly into Fieldglass Flex to view, create, or approve transactions.

1. Navigate to flex.fieldglass.net from your internet browser.
2. Enter your Username and Password.
3. Click Sign In.
CUSTOMIZE YOUR SAP FIELDGLASS HOME PAGE

You can select the information that you want to display on your SAP Fieldglass Home page.

1. On your Home page, click the **Customize** icon in the upper right hand side of the page.
2. For each section shown, select **On** to display the section on your Home page or select **Off** if you do not want to display the section on your Home page.
3. You may also reorganize home page sections by selecting the **Move** option to drag and drop a section to another position vertically on the page.
4. Click **Done** to return to your Home page.

EDIT MY PROFILE AND MY PREFERENCES

If allowed by your company, you can use My Profile and My Preferences to do things like update your contact information, enter a new password, change your secret question and answer, and change notification settings.

To update your contact information, enter a new password, or change your secret question and answer:

1. Click on your name in the upper right corner of the page. Select **My Profile** in the menu that appears.
2. To update your contact information, click **Edit** in the section where your name is displayed. Make the necessary updates and click **Update**. Depending on how your company is set up, you may not be able to edit some sections.
3. To change your password, click the **Change Password** link in the **Account Information** section. Enter your new password information and click **Change**.
4. If allowed by your configuration, you can select a proxy or delegate to act on your behalf. To do so, click **Edit** in the **Proxies & Delegates** section.
5. To set up a **Proxy**, follow these steps:
   - Click on your name in the upper right corner of the page. Select **My Profile** in the menu that appears.
   - You can select a proxy or delegate to act on your behalf. To do so, click **Edit** in the **Proxies & Delegates** section.
   - Click **EDIT** then **Add Proxy** then **Under Work Items**, select All or Timesheets.
   - In the Proxy dropdown, users with Fieldglass access will appear and you can select an appropriate person.
   - Enter a **Start Date** for the Proxy access.
   - You may enter an **End Date**, though leaving that blank will allow that person to have permanent access as your Proxy.
   - Click **ADD**. The screen will refresh, and you will see your Proxy listed. Additional Proxies may be added if desired.

NOTE: Please be aware that by assigning a Delegate, you are allowing the user to inherit your visibility and permissions throughout the system. This may be more visibility and permissions than they currently have.

To change the notifications that you receive by email:
1. Click on your name in the upper right corner of the page. Select **My Preferences** in the menu that appears.
2. Click **Edit** in the **Messaging** section. Select the types of notifications that you want to receive by email and click **Update**.

**VIEW WORK ITEMS**

Items requiring action, such as approving a job posting, can be accessed through your Work Items menu.

1. From the SAP Fieldglass Home page, click the **Work Items** menu, located in the upper right corner of the page.

2. Select the desired action, such as **Approve** for **job postings** or **time sheets**.
3. From the **Work Items** page, you can take action on an item (for example, **Approve** or **Reject**), or you can click an item **ID** to view more detail about the item.

**HOW TO CREATE A JOB POSTING**

*Creating a Job Posting*

To create a new job posting:

1. From the **Create** menu, click the **Job Posting for Temporary Worker** link.
2. Select a **Job Posting Owner**. It is important to select the correct owner. Job postings may be routed for approval based on the owner selected.

3. SAP Fieldglass has two separate views you can use to locate a job posting template or an existing job posting to copy to create the new job posting.

   • **Cards** view allows you to see any job posting templates or existing job postings you’ve starred along with your most recently used sources. A keyword search is also available.
   
   • **List** view allows you to browse for a job posting template or existing job posting in a list format.

4. For this example, click the **List** view if it is not already displayed.

5. Enter the requested information:

   • Change the value for **Billing Currency** if needed.
   
   • Select the source from which to create a job posting: **Job Posting Templates** or **Job Postings**.
      
   • You can use the fields below the column headings to search for a specific template or existing job posting. Enter or select the desired information in these fields and click **Filter** to narrow the list.

6. Click on the **Title** of the desired template or existing job posting.
1. Select a **Start Date** and **End Date** for the job posting.

   **Note:** Click the **Enter job duration** link to specify a specific number of days, weeks, months, or years that the job will last. SAP Fieldglass will calculate the end date based on the job duration you specify.

2. **Number of Positions defaults to 1,** update as needed.

   **Note:** Based on configuration, you may not be able to change the job posting title or description.

3. Determine if **Is travel required for position?**.

4. Select the desired **Site, Location,** and **Business Unit**.

   **Note:** Locations are associated with specific sites. The values available in the location field are determined by the site you select. If no additional locations are defined for a site, the location field will not be displayed.

   Depending on your user profile, the values in the site, cost center, and business unit fields may be automatically displayed. To change your default site and cost center, edit your user profile.
CREATE JOB POSTING – AUGMENT PAGE

1. Enter Posting Information, if desired.

   **Buyer Reference** is an optional field. You can enter information, such as an internal reference number, that can then be used to search for this job posting.
   
   **Comments To Supplier** is an option field that can be used to communicate and special requests or requirements for the Suppliers to see. This is an area that you can list specific schedule times for the position or special facility requirements.
   
   - If you have a referral, please create a named job posting for the candidate.

2. Enter or update Qualifications, if desired.

   Qualifications are skills or characteristics that are desired in the job seeker. Suppliers will rate job seekers on the qualifications listed. Use the Add or remove Qualifications link to update the list. When adding a qualification, indicate whether the qualification is a **Must Have** or a **Nice to Have** attribute.
Select the **Mandatory Response** check box next to qualifications that suppliers must respond to with an answer for the job seeker. For each qualification, use the **Presented** column to indicate the preferred answer or skill level the job seeker should have.

3. **Time Sheet & Expense Sheet Settings**: These values will default based on the job posting chosen.

4. **Accounting** Information will default based on the job posting template selected. There is no need to change rates on the posting. You need to add flat adjustments to account for any amount of expected overtime or travel costs.

5. If desired, use the **Add Attachments** link to add attachments to the job posting.
6. Enter or update the Rules. Depending on the company configuration and job posting template, default values may be displayed.

7. Click Continue.

Note: Click Complete Later to save the job posting as a draft. You can return to it at a later time for review, completion, and submittal.
Create Job Posting – Review and Submit

<table>
<thead>
<tr>
<th>Edit Job Posting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base information</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Posting ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAAJPR0000216</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin. Wendy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Posting Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Analyst</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Billing Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>USD</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temp</td>
</tr>
</tbody>
</table>

**Setup**

**Details**

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/19/2016</td>
<td>06/30/2016</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Analyst</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interprets results using a variety of techniques, ranging from simple data aggregation via statistical analysis to complex data mining. Designs, develops, implements and maintains business solutions for customers. Works directly with clients and project and business leads to identify analytical requirements. Requires 3-5 years of experience in the field or in a related area. Relies on limited experience and judgment to plan and accomplish goals. Typically operates along with a Project Manager and on occasion another business analyst.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Travel Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.000 %</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>US/Boston (100d)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>US/Boston (100d)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Analyst</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Business Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operations (1001500)</td>
</tr>
</tbody>
</table>

**Please select the region and finance contact for this job posting**

<table>
<thead>
<tr>
<th>(No Value)</th>
</tr>
</thead>
</table>

**Cost Allocation**

<table>
<thead>
<tr>
<th>Cost Center</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Allocation %</th>
</tr>
</thead>
</table>

9. Verify all job posting details on the **Review and Submit** page; make changes as needed.

10. **Submit** job posting.
11. The job posting is saved and routed to the next step in the workflow.
12. Upon final approval, the requisition will be reviewed by InGenesis to ensure completeness and may request clarification if needed.
13. Once finalized, InGenesis will distribute to Suppliers for candidate sourcing.

**Note:** Each job posting is assigned a unique ID, which is located at the top of the page above the title. Click the [View Approval Group Routing](#) link on the Progress Status area of the Summary tab to see the approval chain.

### HOW TO REVIEW WORKERS

1. InGenesis will review and confirm qualified job seekers. InGenesis will shortlist these candidates. If candidates are not qualified, InGenesis will reject the candidates.
2. The only workers that will be visible for review will be those candidates with the **shortlisted** status.
3. You can **Compare**, **Reject**, **Unshortlist**, **Mark as interviewed**, **Schedule interviews**, or **Email resume/CV** for the shortlisted candidates.

### HOW TO HIRE A WORKER

1. To hire a worker, go to the [Job posting](#), and click [Job Seekers](#). Check the box next to the [Job Seeker](#) you wish to hire, then click [Hire](#).
2. After you select the Job Seeker you wish to hire, you will be directed to create a Work Order. You will need to fill out all the starred required information to create the Work Order.
3. Please ensure that the **PO number** is populated if you have it. Once you confirm everything is correct, you will have completed the work order, and then the work order will go through the approval process.

4. Once the **Work Order** goes through the approval process, InGenesis will activate the work order.
HOW TO MODIFY A WORK ORDER

There may be times when you need to revise a work order to update the PO number, extend the period of the worker, change supervisor, or transfer the worker to a new location.

1. Select Work Order, click on Actions, then choose the action you wish to perform.

2. To change the start and end date of the work order, or change the PO number, click on Quick Revision.

3. You can also click on Revise, which will allow you to edit the Set Up, Work Order Dates, Timesheet/Expense Sheet, Accounting, Cost Allocation, and General Info.

4. Once you complete a Work Order Revision, it will go through the approval process, and accepted by the supplier, the revision will be reflected on the Work Order.
VIEW A TRANSACTION'S STATUS

When an item is created in SAP Fieldglass, it may be routed for approval. You can view the status of an item at any time by viewing the item’s Approval / Audit Trail tab. To view an item’s status:

1. From the View menu, click the link for the desired module, such as Job Posting or Work Order.
2. Click the ID of the item you want to view.
3. Click the Approvals / Audit Trail tab.

![Approvals / Audit Trail tab]

Note: Click View Approval Group Routing to view all approval levels and all the users assigned to the document’s approval group.
HOW TO VIEW/APPROVE/REJECT TIMESHEETS

VIEW DRAFT TIME SHEETS
You may wish to view time sheets that have not yet been submitted by workers. Viewing draft time sheets for the prior week is a quick method of determining which workers have not submitted their time sheets and therefore may not be appropriately invoiced. To view draft time sheets:

1. From the View menu, click Time Sheet.

2. Click Draft Time Sheet List above the date fields and other filters.

3. Use the Time Sheet Period fields and the Filter button to search for draft time sheets in a specific date range.

APPROVE/REJECT TIME SHEETS

1. To approve/reject timesheets, click Work Items, then under time sheet, click Approve.
2. Once you review the submitted timesheet, you can either click Approve, or Reject.
3. If you Approve, the timesheet will move through the approval process
4. If you Reject, you will be required to select a reason for the rejection, and may add comments if desired.
   The timesheet will go back to worker for revision and then they can resubmit the timesheet.
CLOSE A WORKER

Workers should be closed once their assignment has ended. To close a worker:

1. From the View menu, click Worker.
2. Click the ID for the worker you wish to close.
3. Click Actions and select Close Worker.
4. Select a Reason. Reasons are created and maintained by your SAP Fieldglass system administrator.
5. Enter the Actual End Date.
6. Click Close Worker.

RUN REPORTS

Users with the appropriate user role permissions can run reports. Reporting access and visibility is controlled by your SAP Fieldglass System Administrator. To run a report:

1. From the Analytics menu, click All Reports.
2. Use the search fields and Filter button to search for the report you want to view.
3. Click the Name of the desired report.
4. Select filters and output formats as appropriate. The filters that are available will vary based on the report you selected.
5. Click Run.

GET HELP

- Email ou@ingenesis.com with any concerns

www.fieldglass.com/contact

© 2017 SAP SE or an SAP affiliate company. All rights reserved.
No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP SE or an SAP affiliate company.
The information contained herein may be changed without prior notice. Some software products marketed by SAP SE and its distributors contain proprietary software components of other software vendors. National product specifications may vary.

These materials are provided by SAP SE or an SAP affiliate company for informational purposes only, without representation or warranty of any kind, and SAP or its affiliated companies shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP or SAP affiliate company products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

In particular, SAP SE or its affiliated companies have no obligation to pursue any course of business outlined in this document or any related presentation, or to develop or release any functionality mentioned therein. This document, or any related presentation, and SAP SE’s or its affiliated companies’ strategy and possible future developments, products, and/or platform directions and functionality are all subject to change and may be changed by SAP SE or its affiliated companies at any time for any reason without notice. The information in this document is not a commitment, promise, or legal obligation to deliver any material, code, or functionality. All forward-looking statements are subject to various risks and uncertainties that could cause actual results to differ materially from expectations. Readers are cautioned not to place undue reliance on these forward-looking statements, and they should not be relied upon in making purchasing decisions.

SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP SE (or an SAP affiliate company) in Germany and other countries. All other product and service names mentioned are the trademarks of their respective companies. See http://www.sap.com/corporate-en/legal/copyright/index.epx for additional trademark information and notices.