



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

Problem	Contact
Password Reset	Fieldglass Help Desk Email: fieldglasshelp@sap.com Phone: 866-467-4833
Invoice Submittal	AgileOne Onsite Team Contractor.TS@mheducation.com
Confirm Payment Method	AgileOne Onsite Team Contractor.TS@mheducation.com
Changes to Payment Method or Accounts	AgileOne Onsite Team Contractor.TS@mheducation.com
Physical Address Update	AgileOne Onsite Team Contractor.TS@mheducation.com

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.

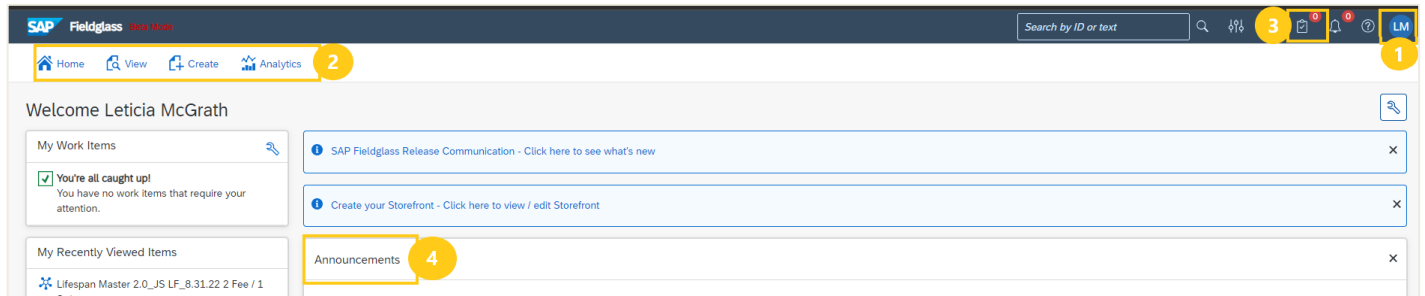
4. Complete the form, then click **Add**. The new user will receive a registration email from Fieldglass.

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



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

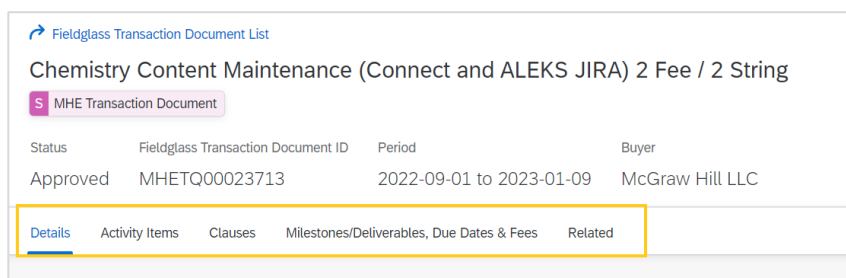
Navigating in Fieldglass is accomplished through Menus. Menus are listed at the top of every screen in Fieldglass:

Fieldglass Menus	
Item	Description
Home	The Home page is your starting point within Fieldglass. The Fieldglass home page provides you quick access to messages and items requiring your attention (work items). Click the Home menu at any time to return to the Fieldglass home page.
View	Use the View menu to locate and view items, such as SOWs. For example, if you select Statement of Work from the View menu, the system shows the current SOWs for a specified date range. You can use the search options at the top of each list to filter the items that are displayed.
Create	Use the Create menu to create new transactions in Fieldglass. The items you can create will be based on your specific system configuration.
Analytics	Use the Analytics menu to run or create reports.
Work Items	Use the Work Items  menu to display a list of current items that require action.
Message Center	Use the Messages  menu to view a list of messages that have been sent to you.
Admin	Use the Admin  icon to access the Admin menu.
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 Fieldglass support as well as the Fieldglass application version.
Settings	Use the Initials  icon to adjust your personal preferences such as date format, time zone & display name, or to update your password.



Tabs

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




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

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**.

Add Proxy Field Definitions	
Field	Description
Work Items	Under Work Items , select All to allow the proxy to act on all your work items. Select Time Sheet to allow the proxy to approve time sheets only.
Proxy	In the Proxy list, select the proxy you want to add. By default, the available users will be anyone with your same user role or with the Administrator user role. Once the proxy is selected, the value for Role will automatically populate.
Start Date End Date	Click the calendar icons next to the Start Date and End Date fields to establish the period during which this person should be your active proxy. If you leave the Start Date blank, the person selected will become your proxy as soon as you click Add . If you leave the End Date blank, the person will remain your proxy until you remove him or her.

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.

Attachments (Request) View All			
Name	Attached By	Rev.	Visibility [i]
MHE1000014403.pdf (23.1 KB)	Agent, Fieldglass 2020-03-18 08:54 AM	0	Public View

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.
 - 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 (MHETQXXXXXXXXX).

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.