SAP Fieldglass Services User Guide

Creating an Invoice & Fieldglass FAQ

March 2020

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OVERVIEW

McGraw Hill LLC has entered into a partnership with AgileOne (Managed Service Provider, or MSP) and Fieldglass (Vendor Management System, or VMS) to support contingent workforce needs.

As of May 30, 2016, AgileOne handles Independent Contractor and Supplier Invoice processing.

This guide outlines the steps needed to submit an Invoice into Fieldglass as well as outlines some answers to Frequently Asked Questions (FAQ).

The Fieldglass Statement of Work (SOW) must be fully approved, including any required internal financial approval and, if applicable, DocuSign execution before any work can begin or invoices generated.

All questions about an SOW before, during, and after approval can be directed to the AgileOne onsite team: contractor.ts@mheducation.com

NOTE: When submitting an invoice, please ensure that Auto Invoice is always marked Yes. If not marked Yes, a delay in payment should be expected.

HOW TO INVOICE IN FIELDGLASS

- 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.

- A Video Tutorial on Invoice Creation is available [here](#).

Deliverable/Milestone or Fee Creation

1. Login to Fieldglass using the username and password created upon initial registration.

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.

<table>
<thead>
<tr>
<th>Status</th>
<th>ID</th>
<th>Revision</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>MHETQ00014424</td>
<td>0</td>
<td>Smartbook Assessment Item Quality Assurance and Fixes</td>
</tr>
<tr>
<td>Approved</td>
<td>MHETQ00014403</td>
<td>0</td>
<td>AH 2020.03.18</td>
</tr>
</tbody>
</table>

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. Scroll to the **Milestones/Deliverables or Fees** section. 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**.
Viewing Submitted Fees and SOW Detail

1. Login to Fieldglass.

2. Select View then Statement of Work.

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).

4. Review the SOW information using the tabs listed under the SOW title and ID.

<table>
<thead>
<tr>
<th>Tab Label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td>The tab contains the description of the project, the total budget summary, and the attachment that contains the signed SOW. 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. No action is needed from you on this tab.</td>
</tr>
<tr>
<td>Clauses</td>
<td>This tab contains the legal clauses agreed to upon signature of the Statement of Work. The clauses viewed here are the same as those in the document attached in the Details 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 Fee detail can be viewed by clicking on the Name of the Fee. This tab also contains the list of Invoices 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 invoices charged against the Statement of Work will appear in this tab.</td>
</tr>
</tbody>
</table>
GENERAL FIELDGLASS TIPS

Changing Your Password

Your Fieldglass password can be updated at any time.

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

3. Enter new password information, then click Change.

Updating Your 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 Your Fieldglass Preferences

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.
FIELDGLASS FAQ AT MCGRAW HILL

Q: I have forgotten my Fieldglass User ID and/or password, how do I retrieve?
A: The Fieldglass Helpdesk is the only party with access to assist. The Fieldglass Helpdesk is open 24x7. When contacting them, be sure to identify yourself as a Supplier in Fieldglass so they can best assist you.

   Email: fieldglasshelp@sap.com
   Phone: US (toll-free) 866-467-4833

Q: I have reviewed the invoicing instructions but I still need assistance, who do I contact?
A: Please contact the AgileOne team at Contractor.TS@mheducation.com. A dedicated team is available to assist you with the process. The team is available from 8 AM – 5 PM Central Time.

Q: I have submitted my Fieldglass invoice (fee). Do I need to take action in any other system(s)?
A: No. Submitting the invoice in Fieldglass is the last required action.

Q: I have submitted my Fieldglass invoice (fee) but I changed Auto-Invoicing to “No”. What should I do?
A: 1. From your Fieldglass homepage, click Create, then SOW Invoice.
   2. Click the SOW to be charged against.
   3. Fill out the required information on the setup page. The code will be for your own records.
   4. In the Details page, add any adjustments or attachments.
   5. Review, then Submit.
   Please contact the AgileOne team at Contractor.TS@mheducation.com for additional assistance.

Q: I have questions about the Fieldglass notifications I am receiving. Who can I contact?
A: Please contact the AgileOne team at Contractor.TS@mheducation.com.

Q: Will I receive direct deposit or a live check from AgileOne for the project worked at McGraw Hill that was invoiced via Fieldglass? If I receive a live check, how do I update my address with AgileOne for future payments or tax statements?
A: When registering with AgileOne, you were given the option to set up direct deposit. If you need to confirm payment method or make changes to your payment method, accounts, or physical address, please contact the AgileOne team at Agile1MHEBilling@agile1.com.

Q: Will I receive remittance details?
A: Yes. You will receive an email from AgileOne with remittance information. If you need confirmation of the email address where the remittance is being sent, or need to update the email address, please contact the AgileOne team at Agile1MHEBilling@agile1.com.
Q: I believe my payment is missing and/or late. Who can I contact?
A: Please refer to your pay agent agreement with AgileOne which outlines your payment terms. They payment clock starts once McGraw Hill approves the Fieldglass invoice “Fee”. If you have not received payments within the correct timeframe, please contact the AgileOne team at Contractor.TS@mheducation.com.