Program Supplier
Fieldglass Reference Guide
SOW (Supplier)

Prepared for:

MHE Contingent Workforce Program

Prepared by:

Agile•1 Program Management Office

Revision Date: 5/26/2016

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Guide Overview

This guide focuses on the most commonly used features of the Fieldglass application. The steps documented in this guide serve as a basis for understanding the functionality of the application.

Learning Objectives/Agenda

When you have reviewed this guide, you should have a better understanding of the SOW module of the Fieldglass application and how it works. You will learn how to use the tool to manage the contingent workforce process from SOW creation to invoicing.

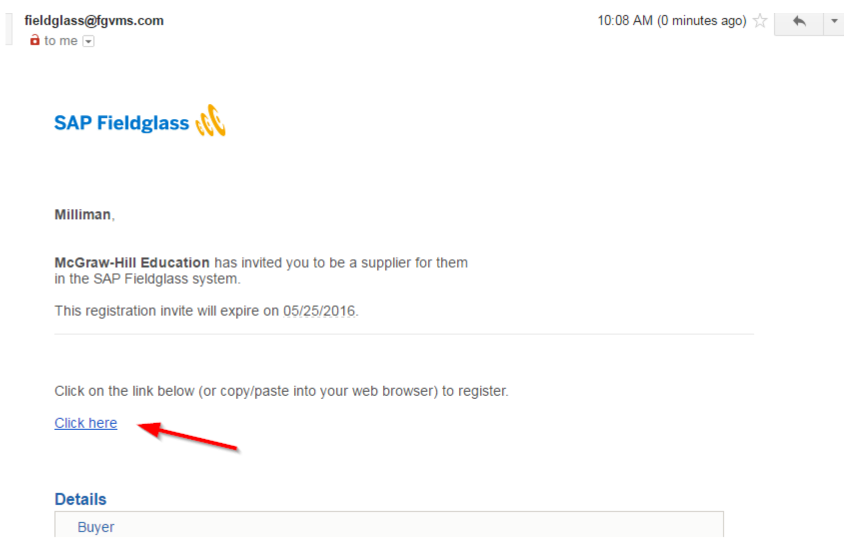
To accomplish this goal, the following topics will be discussed:

- Registering within Fieldglass
- SOW Review/Acceptance
- Invoice Creation
- Reports

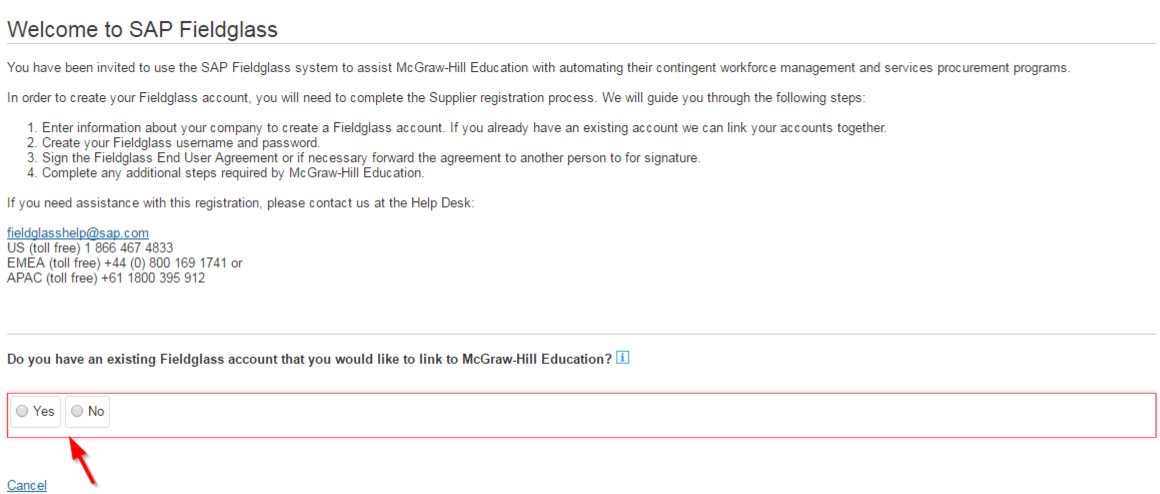
Accessing Fieldglass

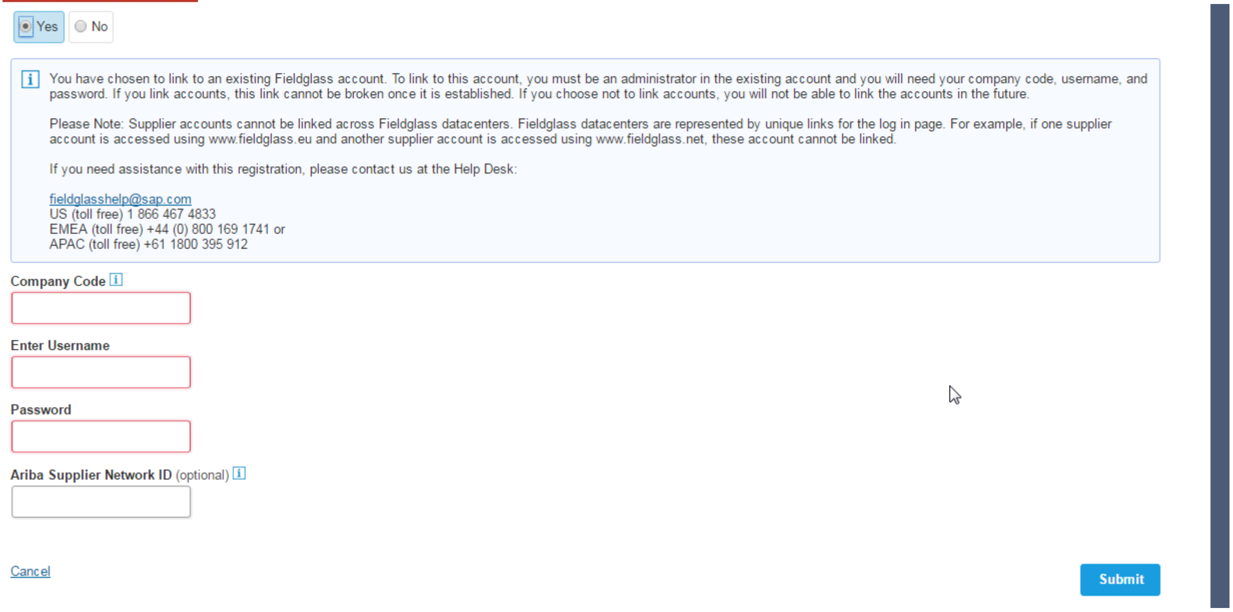
Registering as a Supplier in Fieldglass

1. Supplier registration invite email

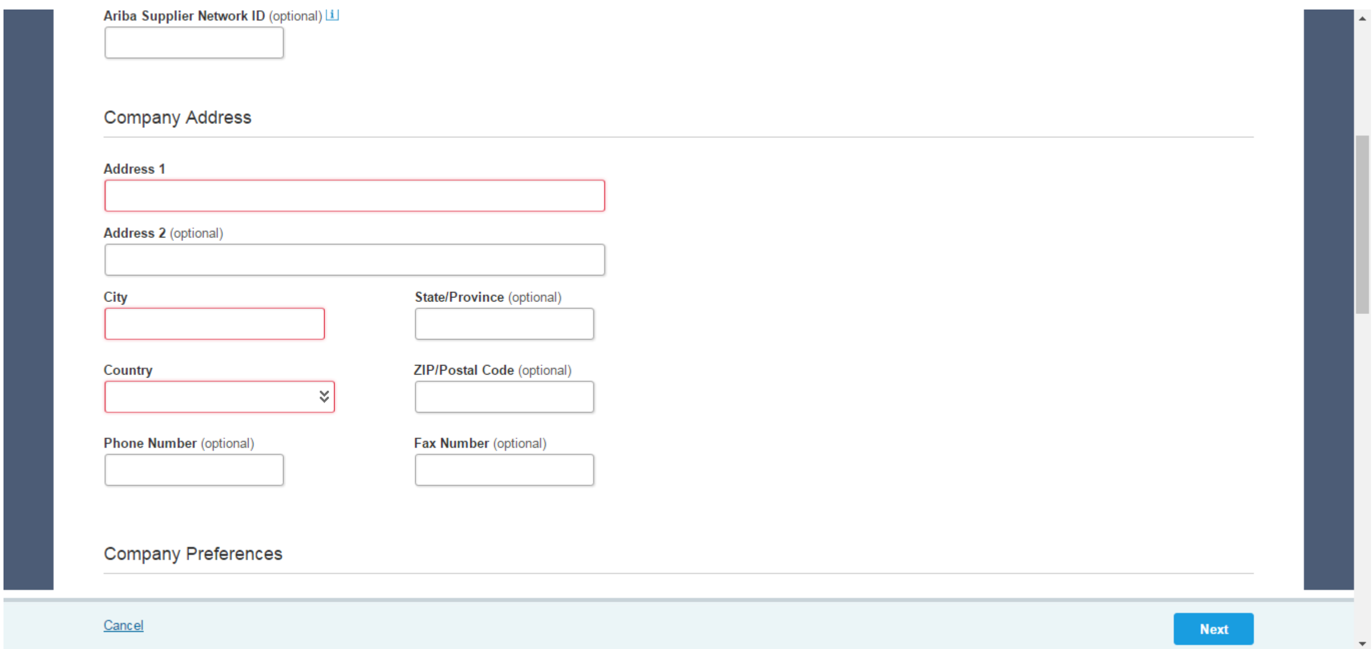


2. Once you click on the "Click here" hyperlink it will take you to the Fieldglass registration page. The registration page will ask you if you want to link to another Fieldglass account. If you answer yes you will have to enter the information to link your account to another client account.

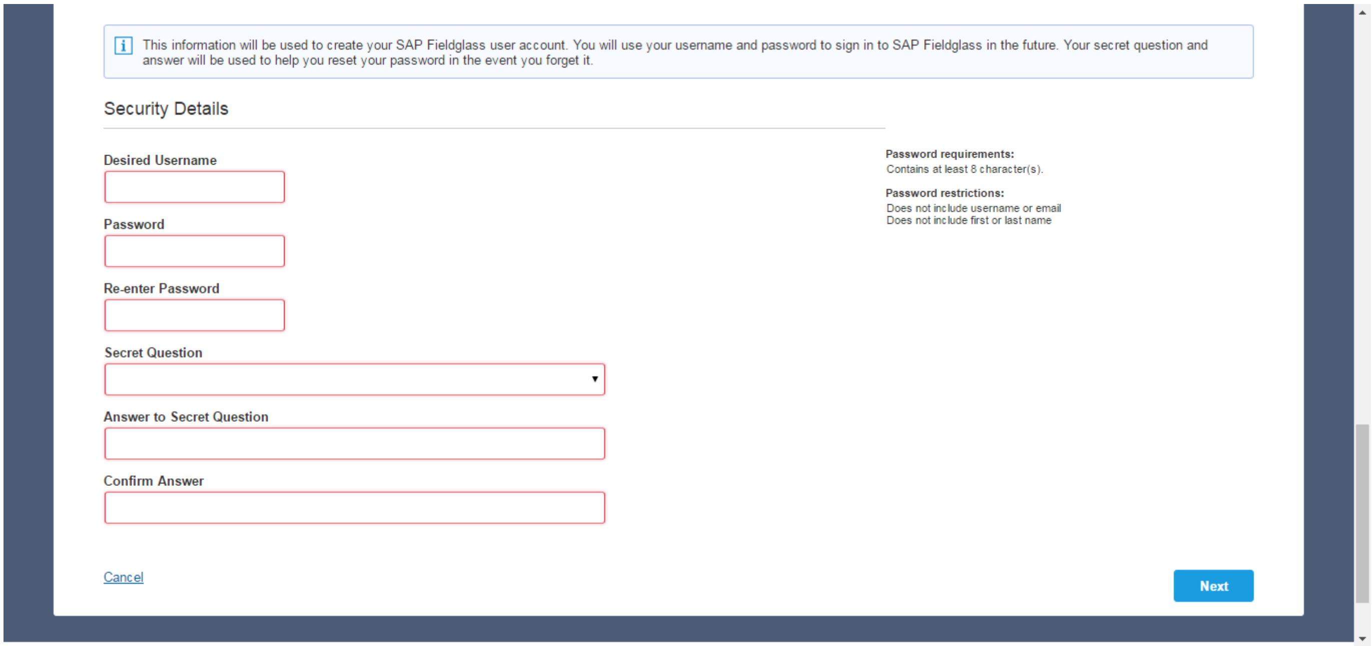




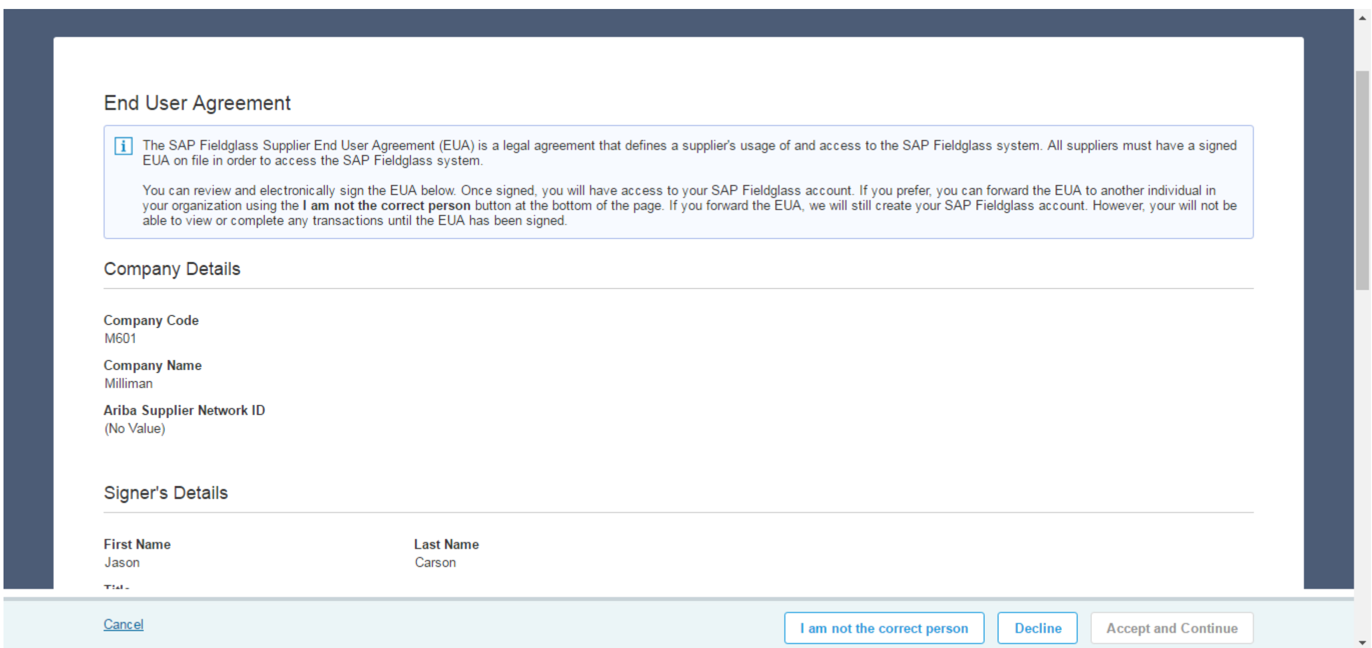
3. Enter your company address information and all mandatory fields.

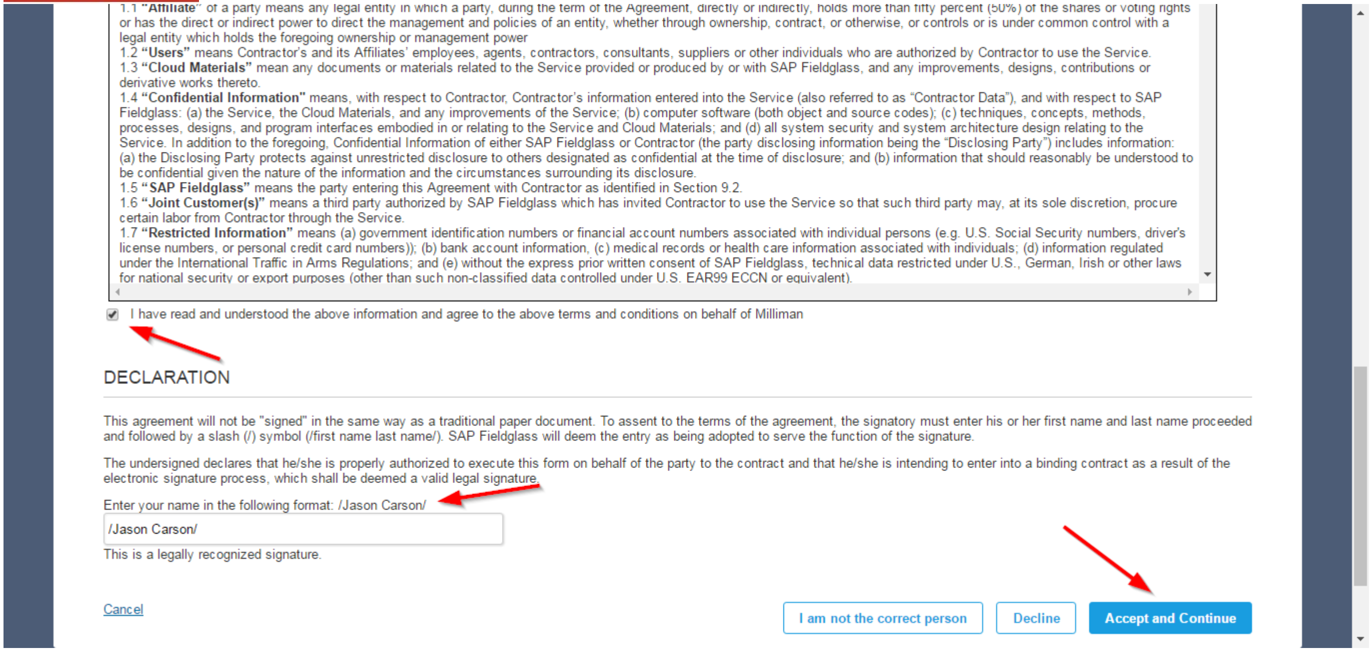


4. Enter security info.



5. Complete EULA





1.1 **"Affiliate"** of a party means any legal entity in which a party, during the term of the Agreement, directly or indirectly, holds more than fifty percent (50%) of the shares or voting rights or has the direct or indirect power to direct the management and policies of an entity, whether through ownership, contract, or otherwise, or controls or is under common control with a legal entity which holds the foregoing ownership or management power
1.2 **"Users"** means Contractor's and its Affiliates' employees, agents, contractors, consultants, suppliers or other individuals who are authorized by Contractor to use the Service.
1.3 **"Cloud Materials"** mean any documents or materials related to the Service provided or produced by or with SAP Fieldglass, and any improvements, designs, contributions or derivative works thereto.
1.4 **"Confidential Information"** means, with respect to Contractor, Contractor's information entered into the Service (also referred to as "Contractor Data"), and with respect to SAP Fieldglass: (a) the Service, the Cloud Materials, and any improvements of the Service; (b) computer software (both object and source codes); (c) techniques, concepts, methods, processes, designs, and program interfaces embodied in or relating to the Service and Cloud Materials; and (d) all system security and system architecture design relating to the Service. In addition to the foregoing, Confidential Information of either SAP Fieldglass or Contractor (the party disclosing information being the "Disclosing Party") includes information: (a) the Disclosing Party protects against unrestricted disclosure to others designated as confidential at the time of disclosure; and (b) information that should reasonably be understood to be confidential given the nature of the information and the circumstances surrounding its disclosure.
1.5 **"SAP Fieldglass"** means the party entering this Agreement with Contractor as identified in Section 9.2.
1.6 **"Joint Customer(s)"** means a third party authorized by SAP Fieldglass which has invited Contractor to use the Service so that such third party may, at its sole discretion, procure certain labor from Contractor through the Service.
1.7 **"Restricted Information"** means (a) government identification numbers or financial account numbers associated with individual persons (e.g. U.S. Social Security numbers, driver's license numbers, or personal credit card numbers); (b) bank account information, (c) medical records or health care information associated with individuals; (d) information regulated under the International Traffic in Arms Regulations; and (e) without the express prior written consent of SAP Fieldglass, technical data restricted under U.S., German, Irish or other laws for national security or export purposes (other than such non-classified data controlled under U.S. EAR99 ECCN or equivalent).

☑ I have read and understood the above information and agree to the above terms and conditions on behalf of Milliman

DECLARATION

This agreement will not be "signed" in the same way as a traditional paper document. To assent to the terms of the agreement, the signatory must enter his or her first name and last name proceeded and followed by a slash (/) symbol (/first name last name/). SAP Fieldglass will deem the entry as being adopted to serve the function of the signature.

The undersigned declares that he/she is properly authorized to execute this form on behalf of the party to the contract and that he/she is intending to enter into a binding contract as a result of the electronic signature process, which shall be deemed a valid legal signature.

Enter your name in the following format: /Jason Carson/

/Jason Carson/

This is a legally recognized signature.

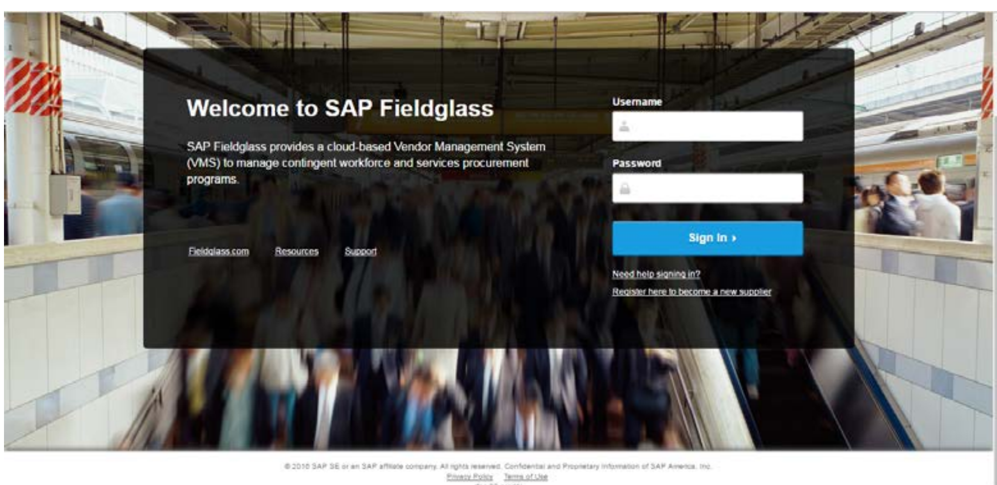
Cancel | I am not the correct person | Decline | Accept and Continue

6. Complete registration

Logging In to Fieldglass

Users can sign in directly to the Fieldglass application from their internet browser.

1. To log in to Fieldglass, navigate to https://www.fieldglass.net.



2. Enter your **Username** and **Password**.

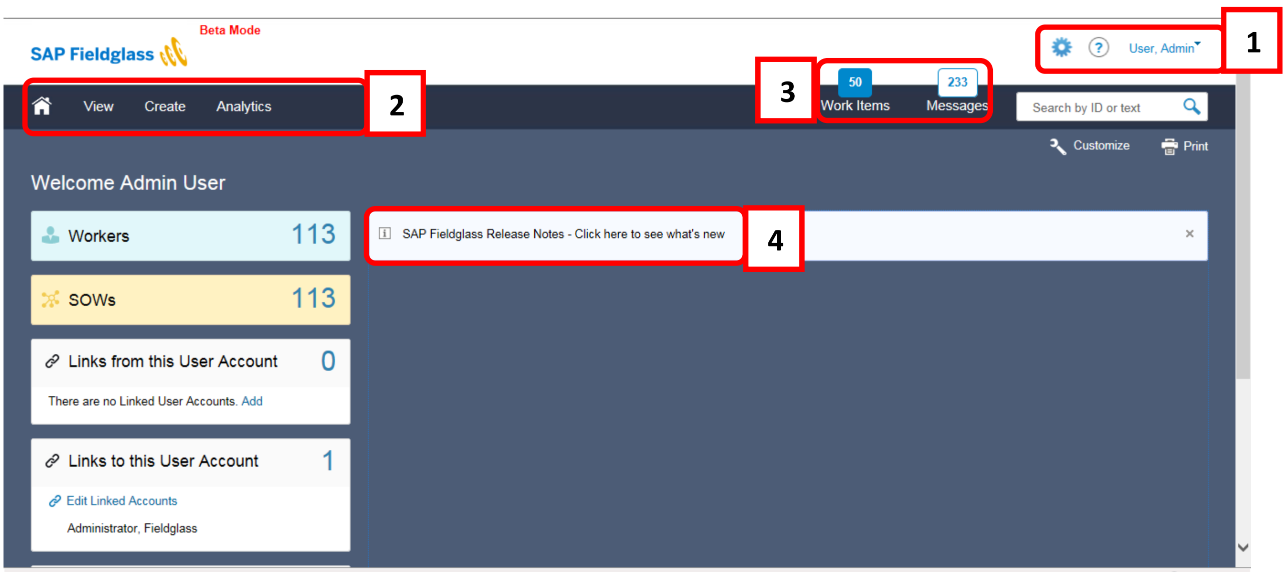
Note: If you have forgotten your username or password, click **Need help signing in?** for help. You may also contact the Agile•1 MSP team with any issues in accessing the Fieldglass VMS tool.

3. Click **SIGN IN**.

   The Fieldglass home page is displayed.

Basic Navigation Concepts

This section explains how to navigate through the Fieldglass application.



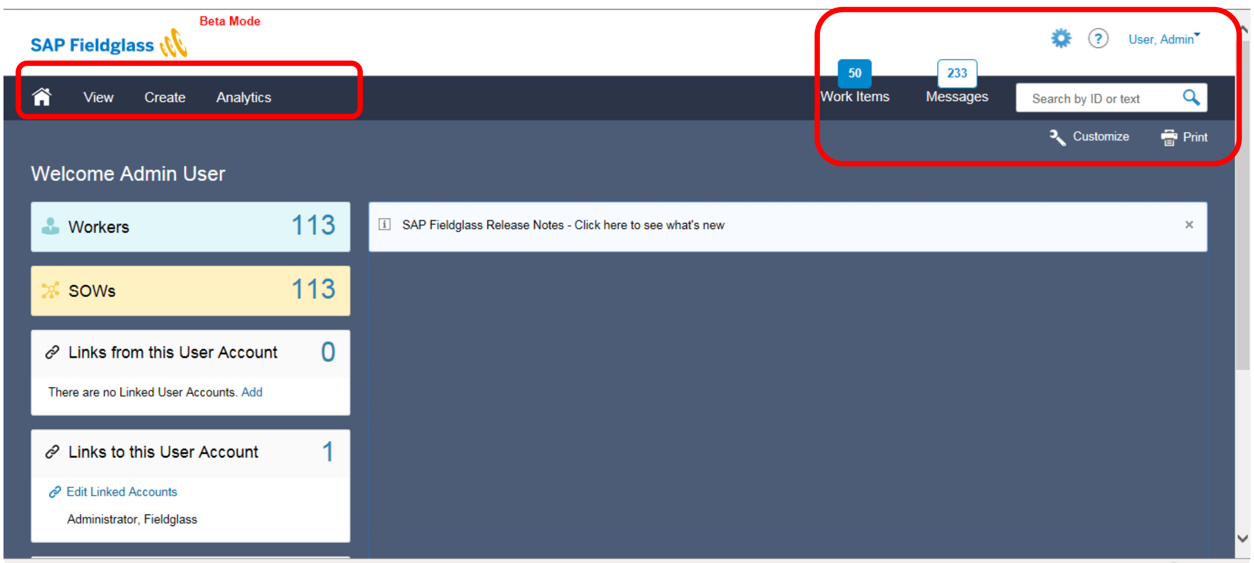
Navigation

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.
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 **HOME** 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.

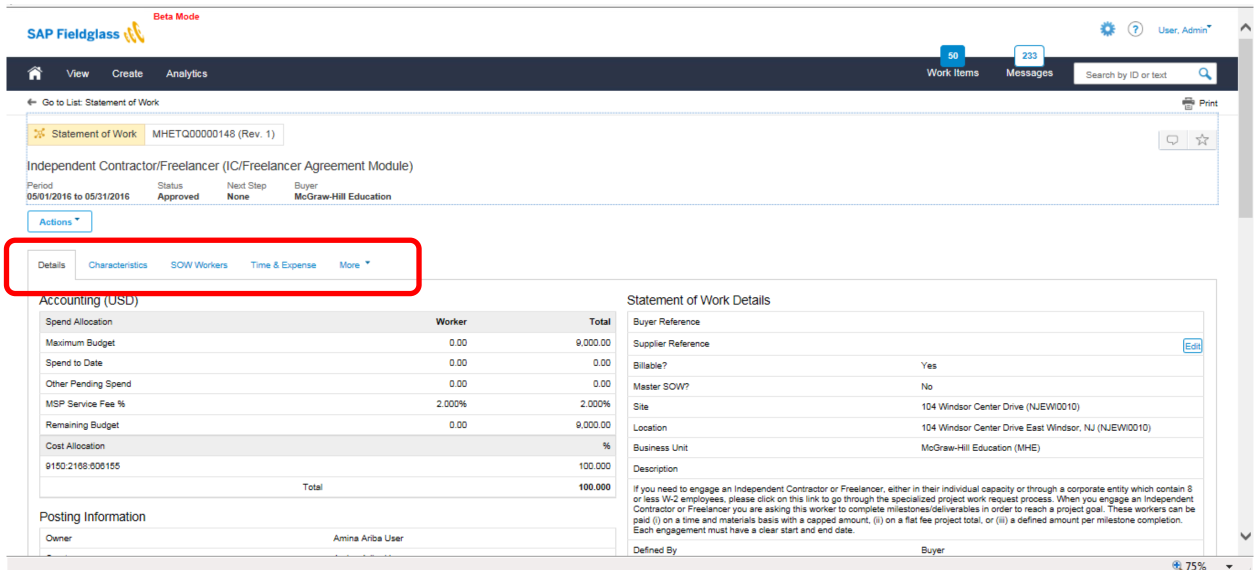
Menus

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



Fieldglass Menus	
Menu	**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 SOW's. For example, if you select **Statement of Work** from the **VIEW** menu, the system shows the current SOW's 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, 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 **Message Center** icon 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 the Admin menu.
Help	Use the **Help (Question Mark (?) Icon)** menu 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.

Tabs



When viewing a record, such as an SOW, tabs are used to group related information.

Click each tab to view additional information about the document. For example, the **Characteristics** tab for an SOW would list all billing events and milestones on the SOW.

Getting Started

Changing Your Password

To change your Fieldglass application password:

1. Click on your name in the upper right corner of the page. Select **My Profile** in the menu that appears.

   The **Personal Settings** page opens, with the **My Profile** tab displayed.

2. Click the **Change Password** link in the **Account Information** section.

   The **Change Password** dialog box is displayed.

3. Enter your new password information and click **Change**.

Updating Your Email Addresses and 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 to you from the Fieldglass application.

1. Click on your name in the upper right corner of the page. Select **My Profile** in the menu that appears.

   The **Personal Settings** page opens, 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 your email notifications in the Fieldglass application should be sent.
4. In the **Cc Email Addresses** field, enter the email addresses that should be included in the cc: field of all email notifications sent to you from the Fieldglass application. To enter multiple cc: email addresses, separate each address with a comma or semicolon.
5. Click **Update** to save your changes.

Updating Your Fieldglass Preferences

1. Click on your name in the upper right corner of the page. Select **My Preferences** in the menu that appears.

   The **Personal Settings** page opens, with the **My Preferences** tab displayed.

3. Click **Edit** to the right of **Locale** to change time zone.
4. Scroll down to the **Messaging** section.
5. Click **Edit**.
6. 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. Messages generated by the Fieldglass application are always available in the Fieldglass Message Center. However, for each type of item, you can specify if emails should also be sent.
7. If enabled, you can configure your **Send Notification Digest** and **Send Work Item Digest** messaging preferences.
8. Click **Update** to save your changes.

Updating Your Proxy Information

A proxy is a person who can act on your work items in the Fieldglass system when you are unavailable to do so yourself.

1. Click on your name in the upper right corner of the page. Select **My Profile** in the menu that appears.

   The **Personal Settings** page opens, with the **My Profile** tab displayed.

2. Scroll down to the **Proxies** section.
3. Click **Edit**.
4. To add a new proxy, click **Add Proxy**.

   The **Add Proxy** dialog box is displayed.

5. Enter the requested information about the proxy:

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.

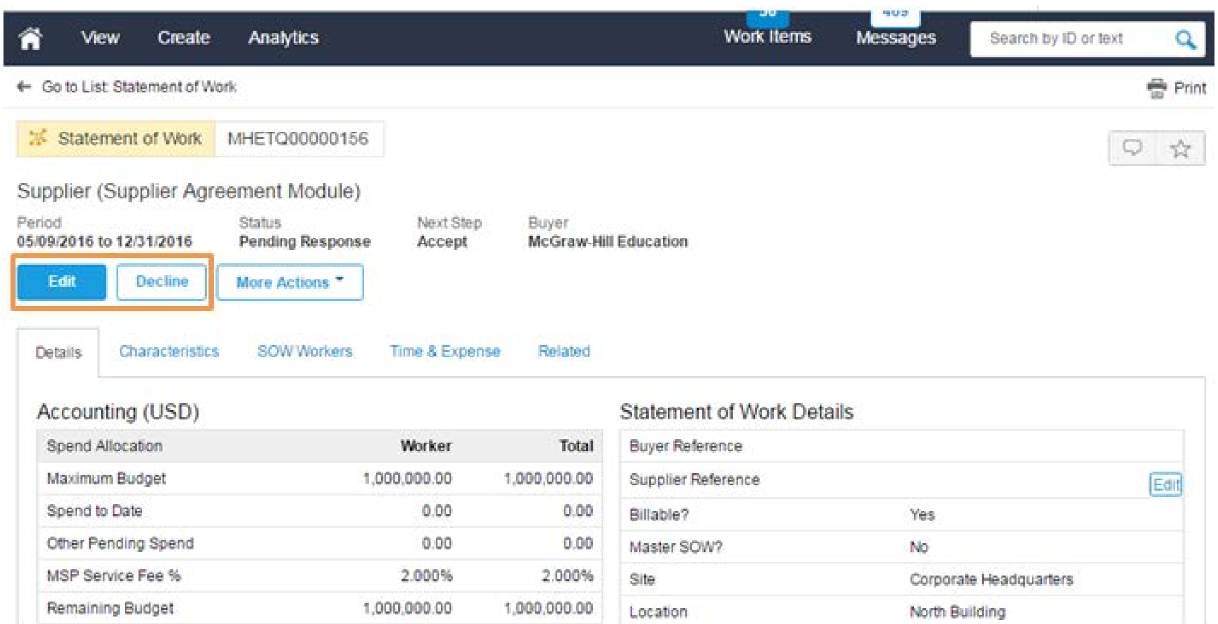
Add Proxy Field Definitions	
Field	**Description**
Proxy	In the **Proxy** list, select the proxy you want to add. By default, the available users will be anyone with your same user role or with the Administrator user role. Once the proxy is selected, the value for **Role** will automatically populate.
Start Date **End Date**	Click the calendar icons next to the **Start Date** and **End Date** fields to establish the time 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.

6. Click **Add**.
7. To change the start date or end date for an existing proxy, click **Edit** next to the proxy you want to update. Make the necessary changes and click **Update**.
8. To remove an existing proxy, click **Remove** next to the proxy.

Statement of Work Review

Responding to an SOW

1. Log in with your Supplier user account
2. Click on View and choose "Statement of Work" (Or Work Items – Statement of Work "Accept")
    a. You can also click on the Statement of Work ID identified in the notification email you receive for the new requisition
3. Review the Statement of Work:
    a. Click "Edit" to proceed to next step
    b. Click "Decline" if any discrepancies identified



Create SOW Response

To Create an SOW response, Click on "Edit"

1. Fieldglass will give you option to add a Supplier Reference for internal tracking
2. Select a Primary Contact Person (**NOTE:** This person will have the rights for entering milestones, events, and invoicing).
3. Comments to Buyer: Optional field
4. Auto Invoice all Characteristics, Timesheets and expense sheets: Y or N
5. Attach any relevant documents here (optional)

6. Click **Continue**

7. Review Events and Milestones, and click **Continue**
8. If this SOW tracks time and materials, you have the ability to add SOW workers here.
9. Click **Continue**
10. Create SOW response Details – Click **Submit**
11. **Enter Comment** to submit SOW for approval
12. You will receive message that **“Statement of Work has been submitted”**
13. SOW will be sent for final approvals at this stage by the MHE Requestor
14. Supplier will also receive final contract from MHE via Docusign

Event/Milestone Entry

Supplier Marks Event as Completed

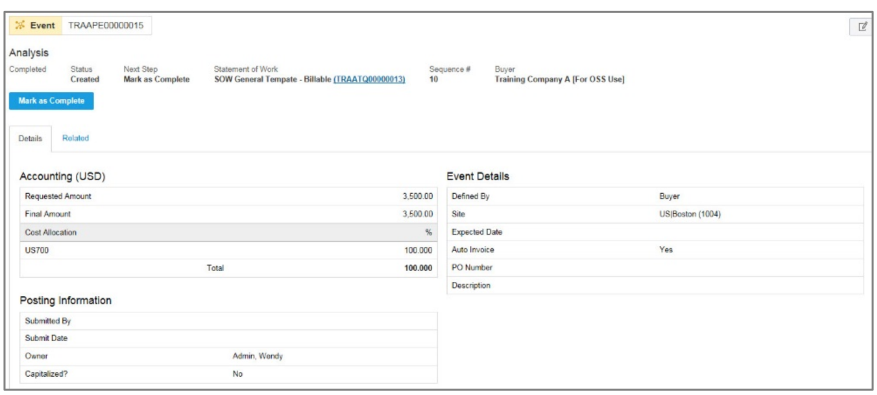
To mark an Event as completed as a supplier, complete the following tasks:

1. Click the **View** menu and select **SOW Line Item**.

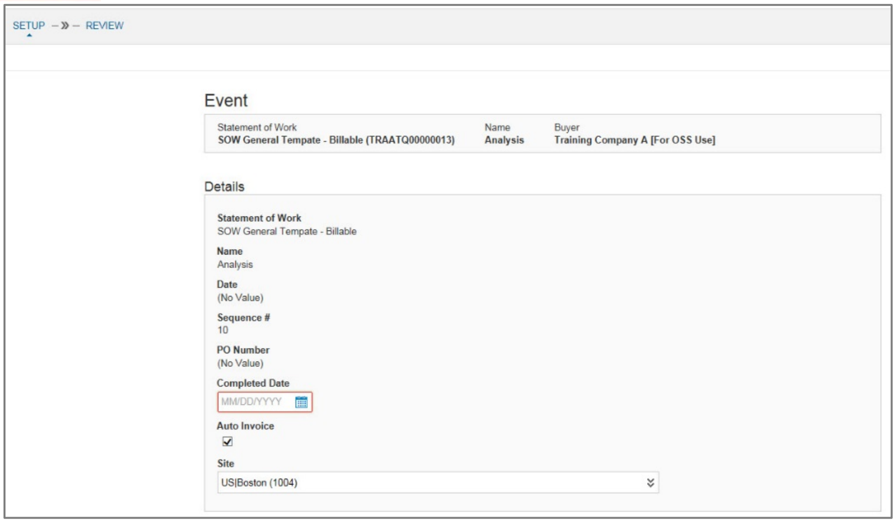
   Note: Another option is to select the desired SOW from **Statement of Work** and proceed to the **Characteristics** tab.

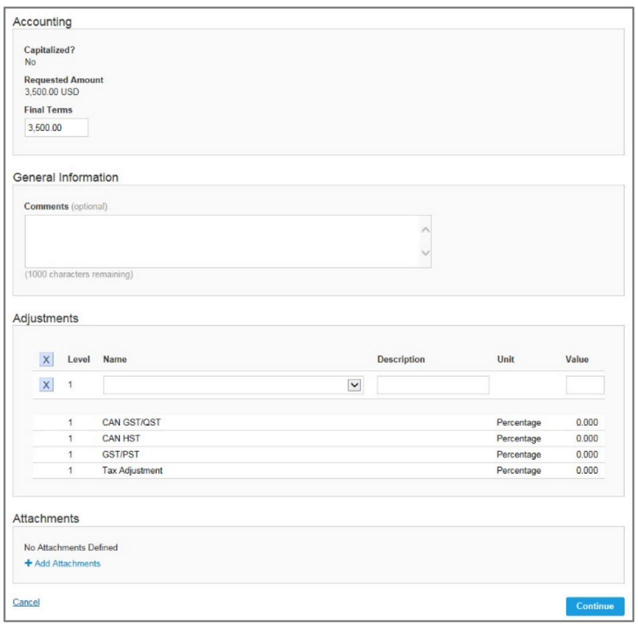
2. Click the **ID** link of the desired **Event**.

3. On the **Event**, click **Mark as complete.**



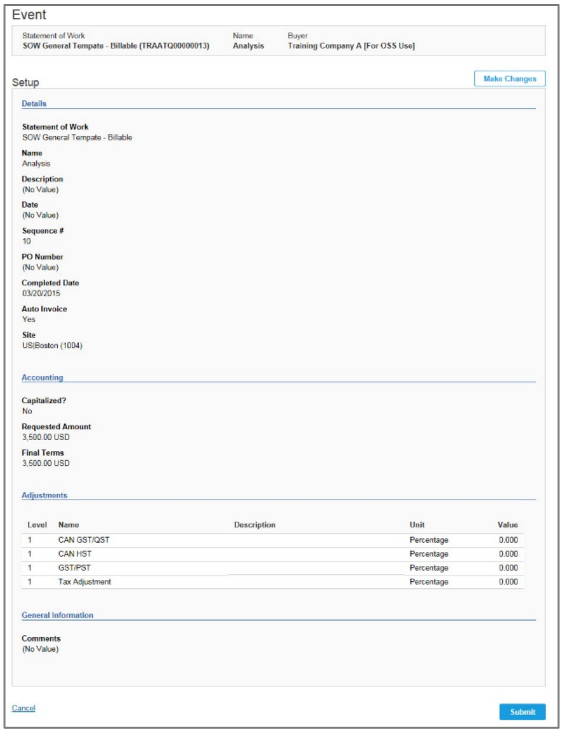
4. Complete the **Setup** page by entering or selecting the **Completed Date**, entering the **Final Terms** and **Comments** and adding **Adjustments** or **Attachments** if applicable.





5. Click **Continue**.

6. On the **Review** page, ensure all of the details are correct. If changes are required, click **Make Changes**.

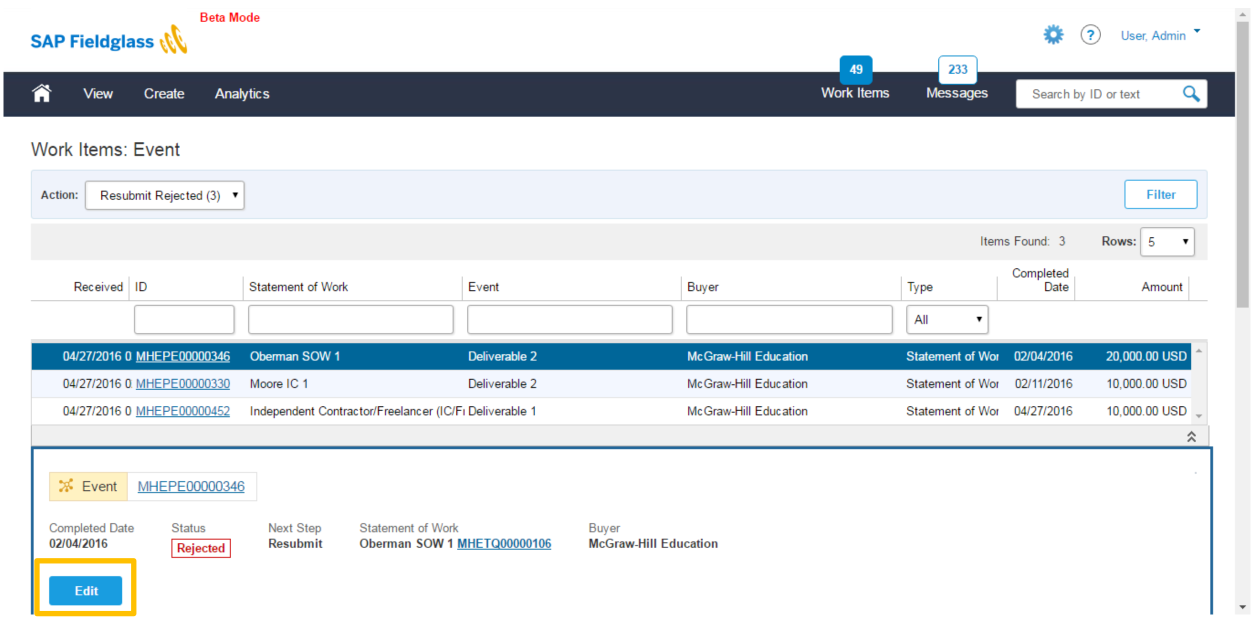


7. Click **Submit**.

   Note: The Event will be routed for approval.

Resubmit a Rejected Billing Item

1. Supplier will receive notification of a rejected billing item via email
2. Log into Fieldglass
3. Under Work Items, under Event or Fee, Select **Resubmit Rejected**
4. Click **Edit**



5. Make Corrections and Hit **Continue**
6. Review Changes Made
7. Click **Submit**

Invoicing

Agile•1 consolidates all approved SOW billing items on a weekly basis to invoice MHE.

For questions around invoicing, please send an email to Brenton Williams bpwilliams@agile1.com AND the Agile•1 client services team at contractor.TS@mheducation.com.

- The Email should include as much detail as possible about the question/concern.

- The Billing Support Team/Agile•1 Team will respond back to that email as soon as possible.

Credit / Debit Memo Submittal

Note: CR/DB memos are used to make adjustments to invoicing.

1. Log in using your Supplier account
2. Click on View Menu and Payments Sub-menu item, and select Invoice
3. Select an Invoice to adjust by clicking on the ID hyperlink on one of the listed Invoices.
4. Click the 'Actions' button and select the Credit/Debit Memo action item
5. Complete the Setup fields
6. Enter Credit/Debit Memo Code (This must be unique for every transaction. We recommend you keep a tracking log to prevent duplicate numbers)
7. Check the box next to the Event or Milestone to Adjust
8. Click Next and Select the Entry or Date/s that need adjustment
9. Click Next and continue:
10. Revise the amount against the correct line items by entering the correct expense amount in the “Revised” field
11. Click “Calculate Totals”
12. Select a Reason Code for each change being made
13. Click Next and continue
14. Review Line Subtotals
15. Credit/Debit memo must be submitted within 60 days of expense.
16. Enter supporting comments and/or attachments
17. Click on 'Next' button and review the Credit/Debit Memo details
18. Click 'Submit'

SOW Revision Approve/Reject

1. Log in using your Supplier account
2. Click Work Items and Select "Accept" under SOW Revision
3. Click “Accept” to approve and accept revision
4. Select “Decline” to reject revision

Updating Reason codes

1. Supplier can update/add reason codes in Fieldglass using the “Admin” function. Supplier should select “reason” located under the configuration sub-menu on the admin screen.
2. New reason codes can be added by selecting “New” at the top right of the screen.

3. First select the appropriate module
4. Verify the correct type is listed in the drop down.
5. Enter the reason code (See attachment for sample reasons).
6. Click “add” to save.
7. Additional reason codes can be added by clicking “New” again and repeating steps 3-6.

These steps only need to be performed once by a registered user of your account and do not need to be performed by all users.

Supplier Reason Codes.xlsx

Analytics

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

Running a Predefined Report

To run one of the Fieldglass predefined reports:

1. Click the **ANALYTICS** menu and select **All Reports**.
2. Click a report **Name**.
3. Scroll through the filter options and make all required selections. The report filters 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.