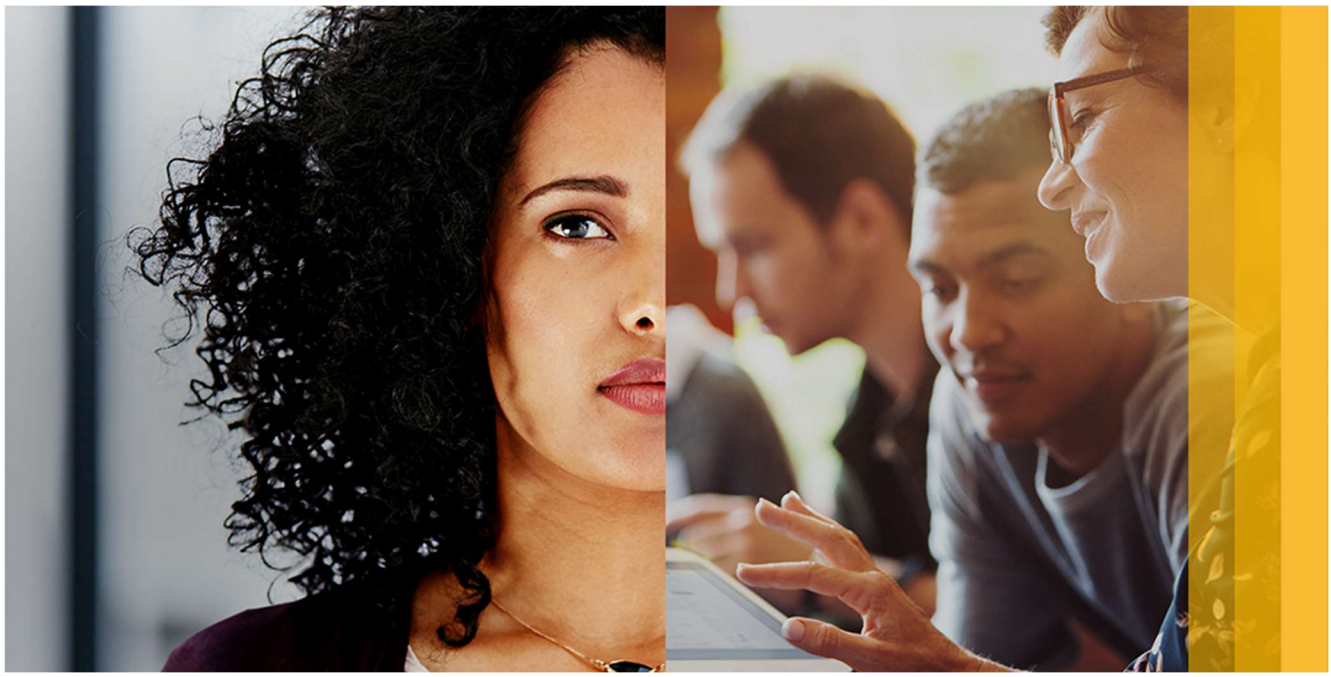


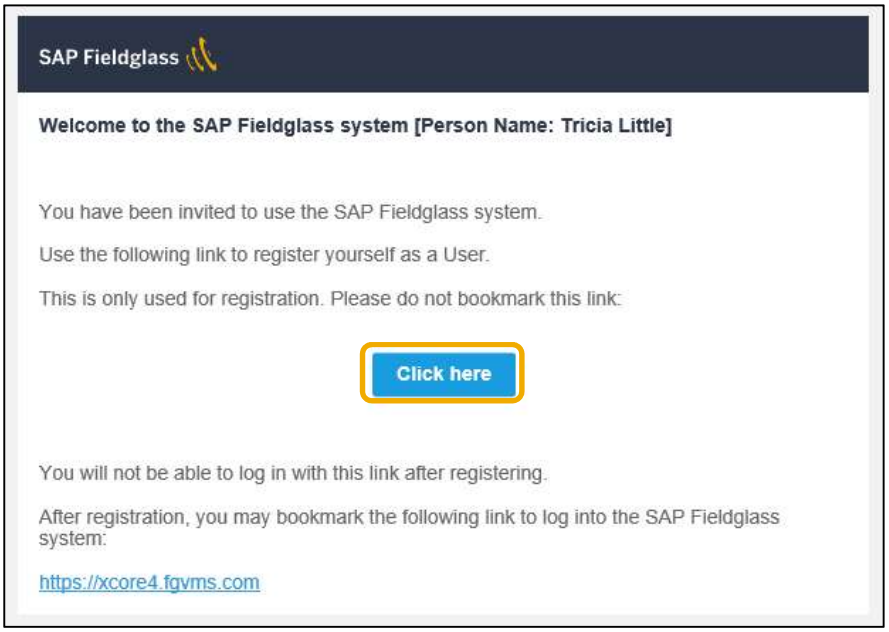
Ohio University
Quick Reference Guide
SAP Fieldglass
InGenesis MSP Program

TABLE OF CONTENTS

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**.

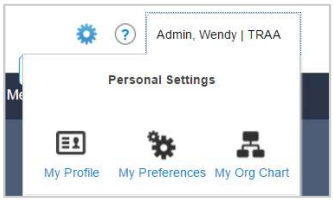
CUSTOMIZE YOUR SAP FIELDGLASS HOME PAGE

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.

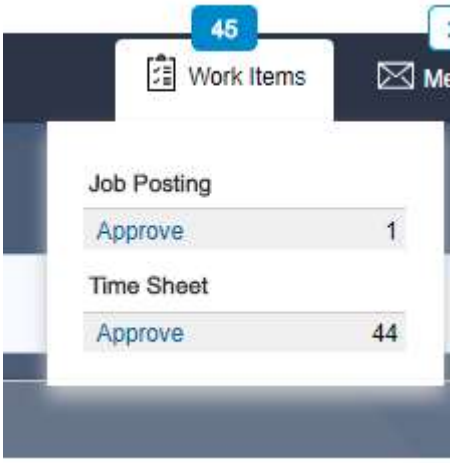
To change the notifications that you receive by email:

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.



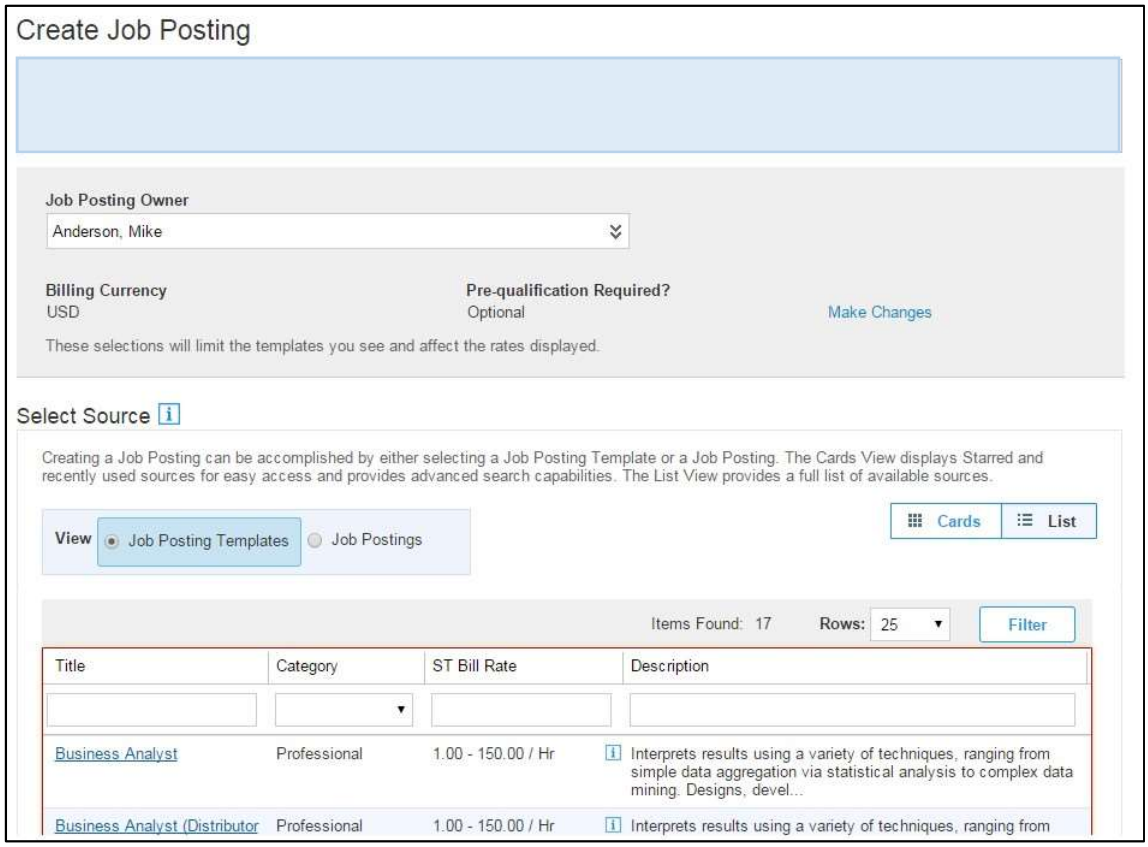
2. Select the desired action, such as **Approve** for **job postings** or **time sheets.**
3. From the **Work Items** page, you can take action on an item (for example, **Approve** or **Reject**), or you can click an item **ID** to view more detail about the item.

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.

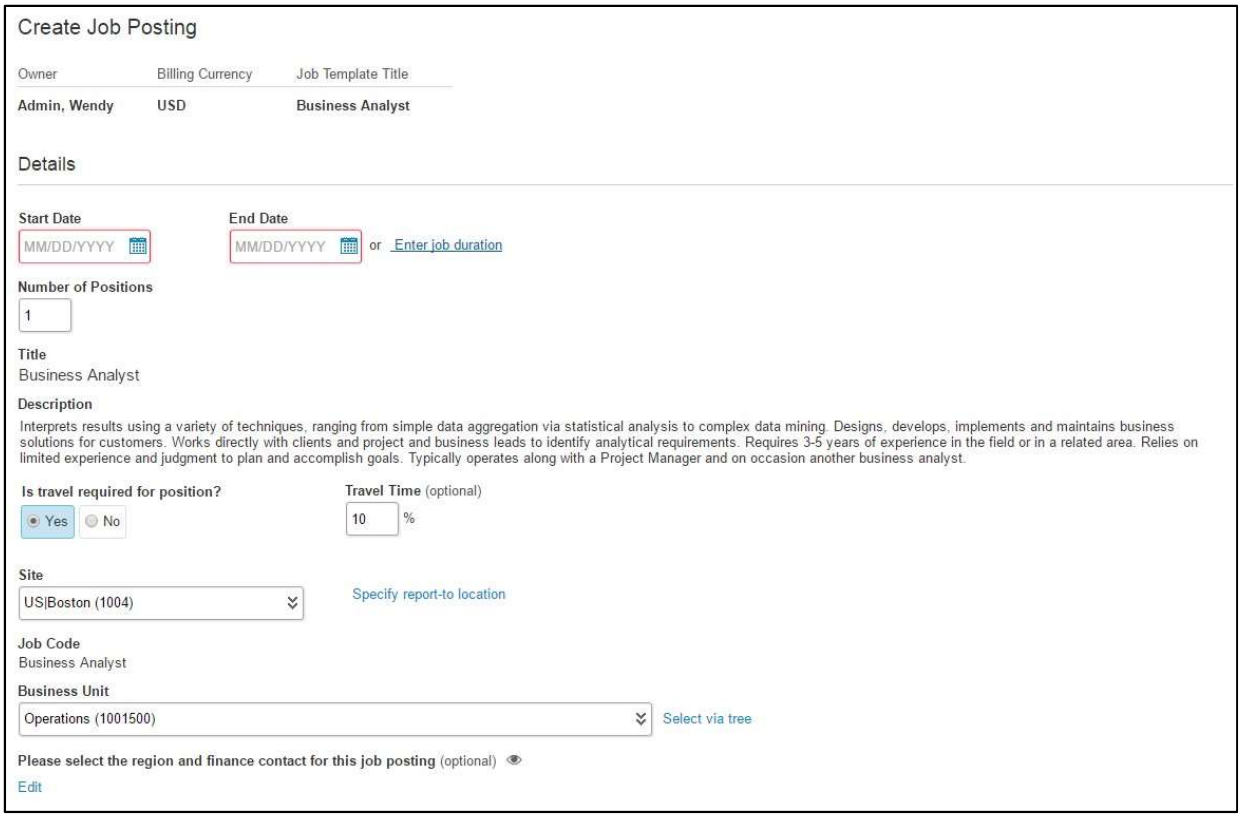
5. Enter the requested information:

   - 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.

<u>*7. If there is not an existing template for a job you would like to request, please reach out to the InGenesis team at ohio@ingenesis.com to get that job added.</u>**

CREATE JOB POSTING – SETUP PAGE



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.

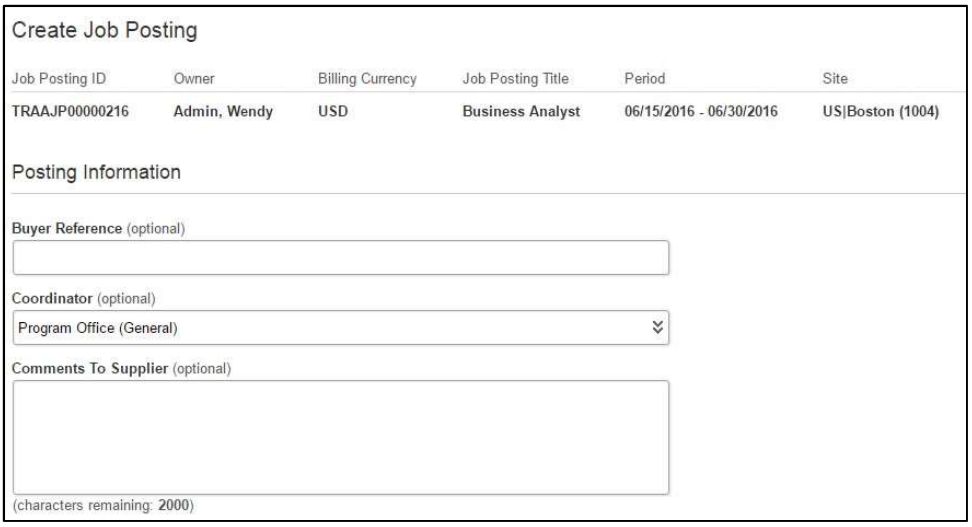
Note: Based on configuration, you may not be able to change the job posting title or description.

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

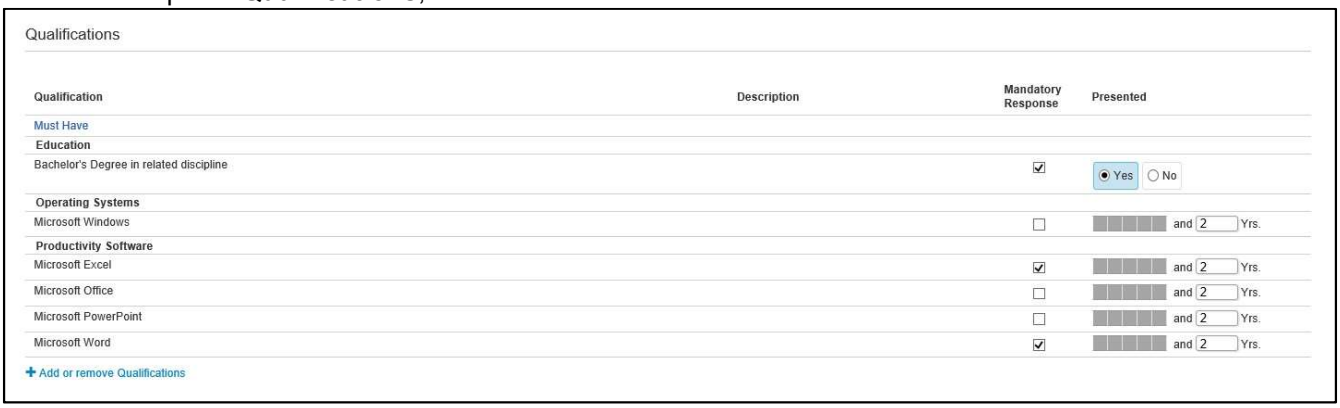


1. Enter **Posting Information**, if desired.

   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.**

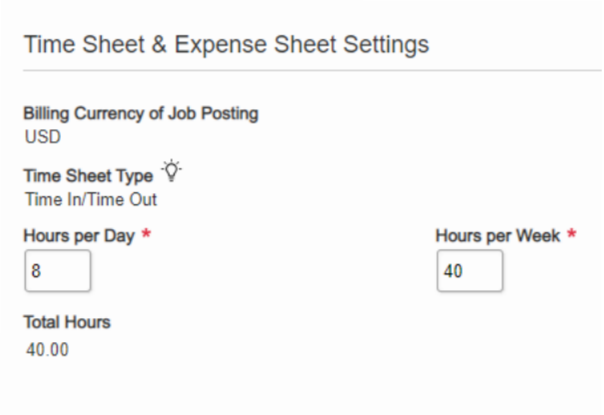
2. Enter or update **Qualifications**, if desired.



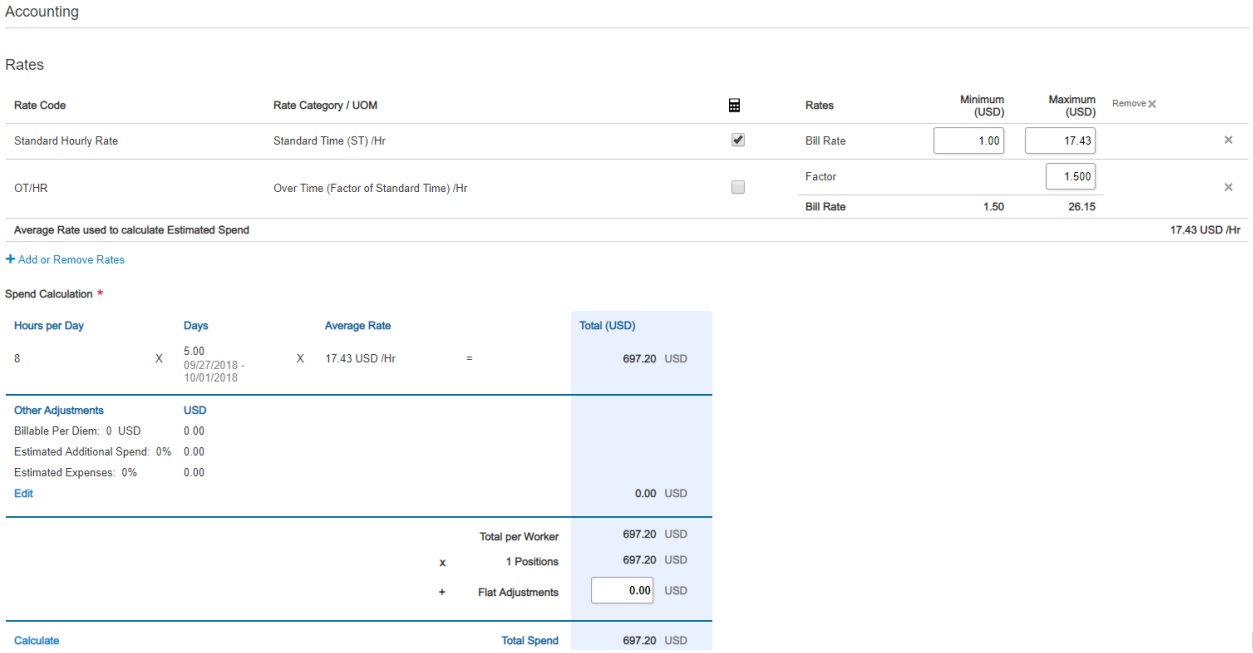
   Qualifications are skills or characteristics that are desired in the job seeker. Suppliers will rate job seekers on the qualifications listed. Use the **Add or remove Qualifications** link to update the list. When adding a qualification, indicate whether the qualification is a **Must Have** or a **Nice 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.

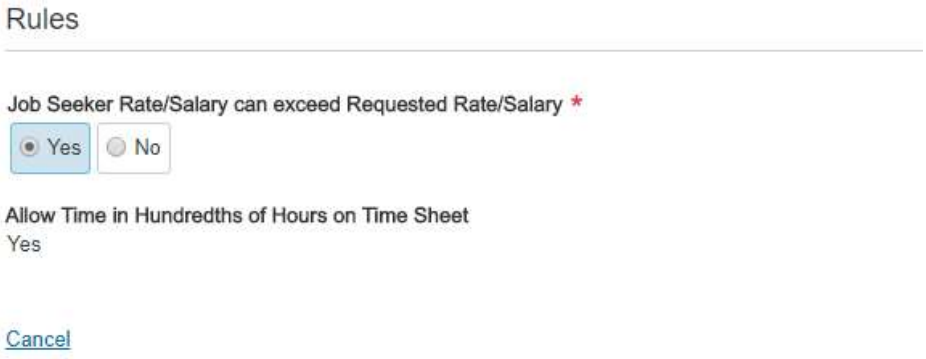
3. **Time Sheet & Expense Sheet Settings:** These values will default based on the job posting chosen



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

Edit Job Posting

Base Information

Job Posting ID
TRAAJP00000216

Owner
Admin, Wendy

Job Posting Template
Business Analyst

Billing Currency
USD

Service Type
Temp

Setup

Make Changes

Details

Start Date
06/15/2016

End Date
06/30/2016

Number of Positions
1

Title
Business Analyst

Description
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.

Travel Time
10.000 %

Site
US|Boston (1004)

Location
US|Boston (1004)

Job Code
Business Analyst

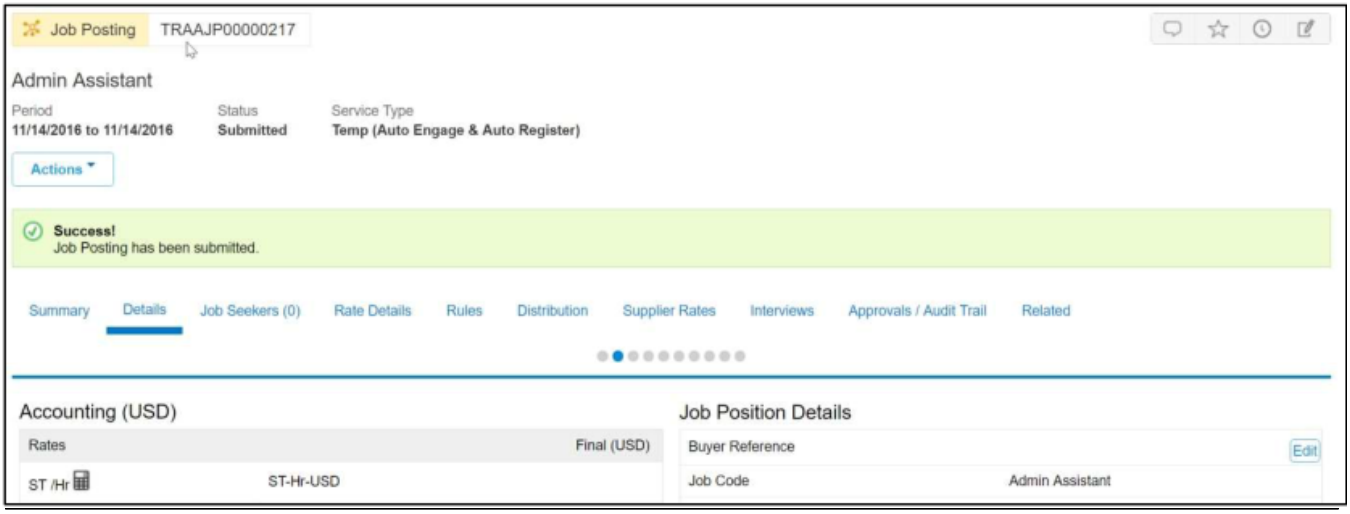
Business Unit
Operations (1001500)

Please select the region and finance contact for this job posting
(No Value)

Cost Allocation

Cost Center **Allocation %**

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 requistion 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.

14. In order for Purchasing to process a Purchase Order for your temp, ensure that you print this page by clicking on the print icon on the top right hand corner. Save the job posting details page as a PDF and submit to Bobcat Buy.

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.**

Job Seekers

Cards List

Un-Reviewed (2) In Review (0) Selected for Hire (0) All (2)

Customize Card View

0 Selected
Select All

Compare Shortlist Reject Actions

Sort By Average Rate Ascending Descending

Mouse, Mighty

Job Seeker I1TUJS00000014

Submitted

Supplier
InGenesis Health Care Network

Available On
09/24/2018

Rating

Preview Go to Details

Resume / CV was not attached Hire Actions

Meets Requested Criteria

Duck, Donald

Job Seeker I1TUJS00000015

Submitted

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**.

Create Work Order

Job Posting	Supplier	Job Seeker
Accounting Support Specialist (O0PTJP00000012)	InGenesis Health Care Network	Mouse, Mighty (I1TUJS00000014)

Setup

	Current	New
Work Order/Work Order Revision Owner	RL	RL
Business Unit	FINANCE	FINANCE
Site	Academic Center (Southern-6101)	Academic Center (Southern-6101)
Location	Academic Center (Southern-6101)	Academic Center (Southern-6101)

+ Change Setup

Work Order Dates

Date (MM/DD/YYYY)	Requested	Presented	Final Terms
Start Date	09/24/2018	09/24/2018	09/24/2018
End Date	10/01/2018		10/01/2018
			or Enter job duration
Trial End Date(optional)	10/01/2018		MM/DD/YYYY
Time Sheet Start Date			09/24/2018

Worker Settings

	Requested	Final Terms

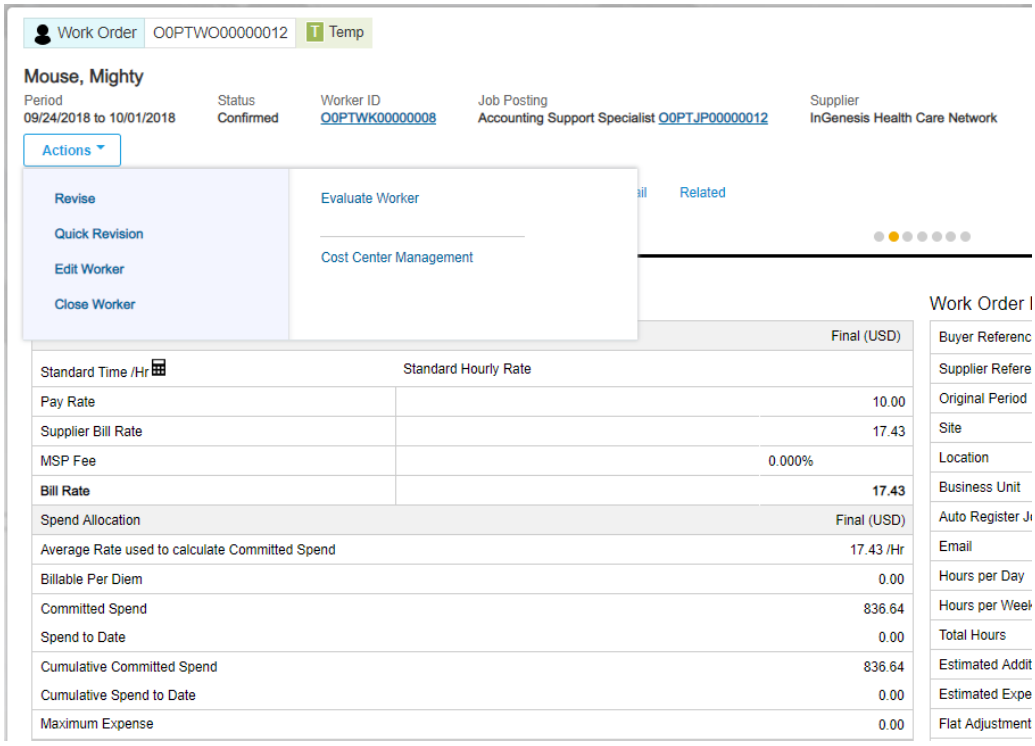
3. Please ensure that the **PO number** is populated if you have it. Once you confirm everything is correct, you will have completed the work order, and then the work order will go through the approval process.

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.



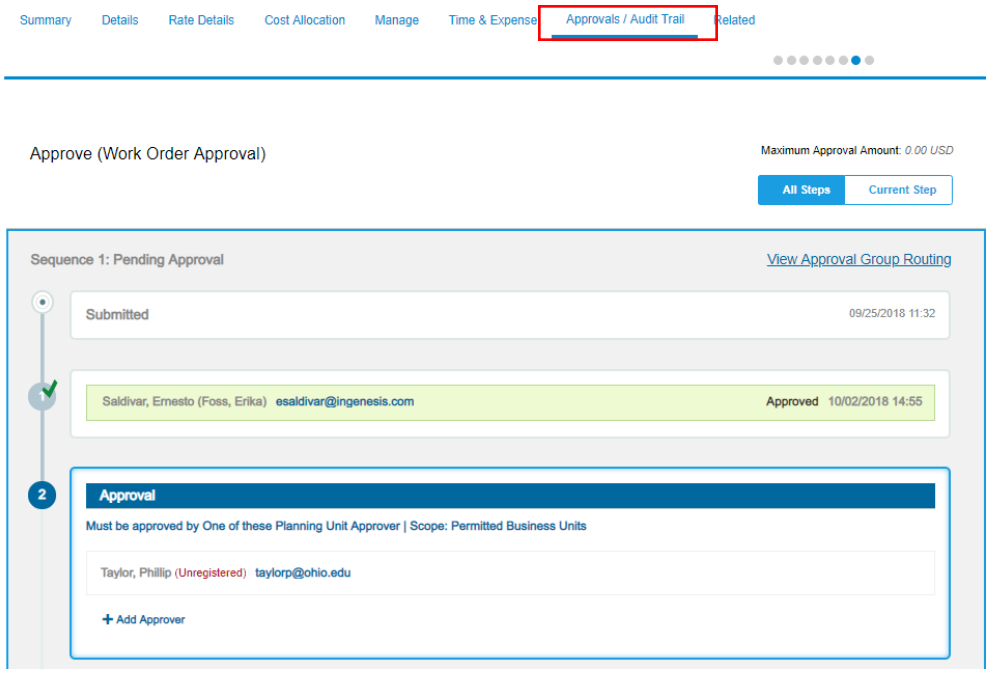
2. To change the start and end date of the work order, or change the PO number, click on **Quick Revision**

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 throgh 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.



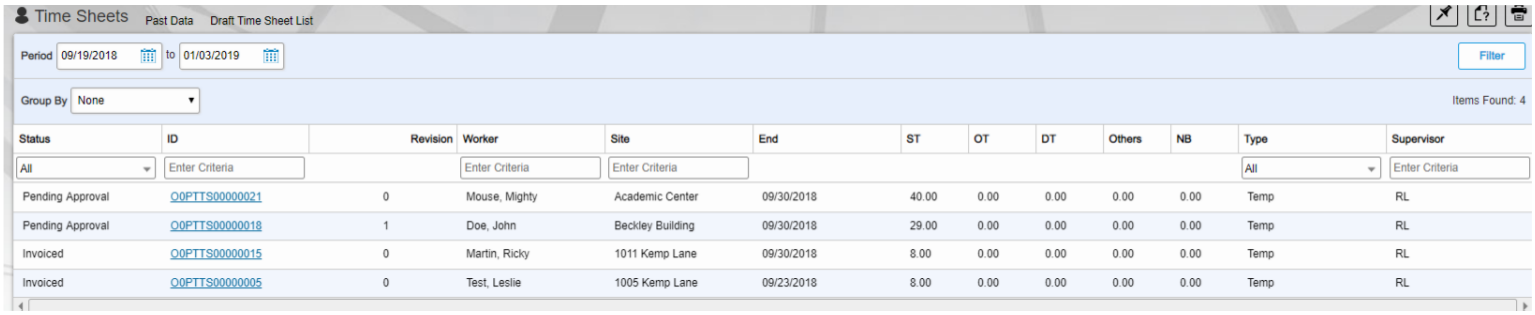
Note: Click **View Approval Group Routing** to view all approval levels and all the users assigned to the document's approval group.

HOW TO VIEW/APPROVE/REJECT TIMESHEETS

VIEW DRAFT TIME SHEETS

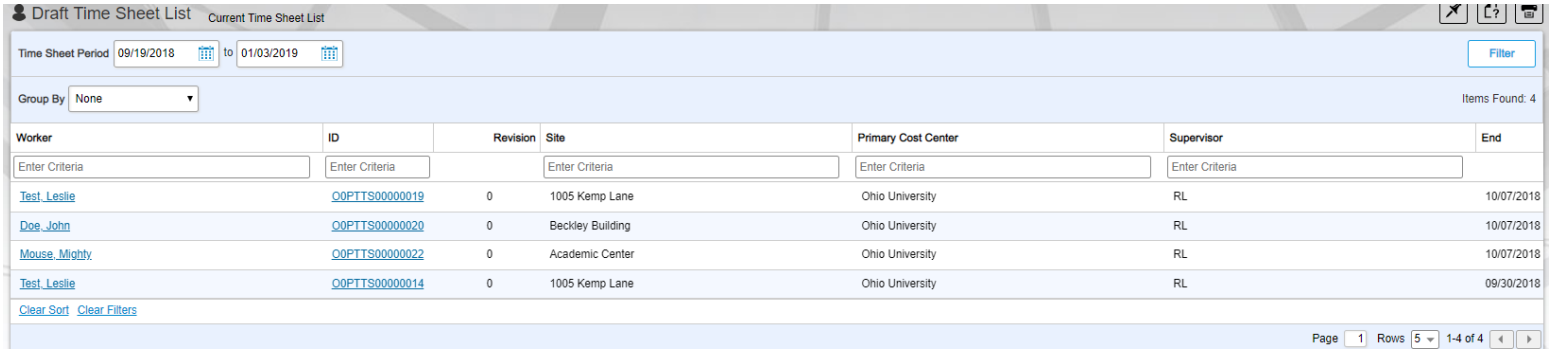
You may wish to view time sheets that have not yet been submitted by workers. Viewing draft time sheets for the prior week is a quick method of determining which workers have not submitted their time sheets and therefore may not be appropriately invoiced. To view draft time sheets:

1. From the **View** menu, click **Time Sheet**.



Status	ID	Revision	Worker	Site	End	ST	OT	DT	Others	NB	Type	Supervisor
All	Enter Criteria		Enter Criteria	Enter Criteria							All	Enter Criteria
Pending Approval	O0PTTS00000021	0	Mouse, Mighty	Academic Center	09/30/2018	40.00	0.00	0.00	0.00	0.00	Temp	RL
Pending Approval	O0PTTS00000018	1	Doe, John	Beckley Building	09/30/2018	29.00	0.00	0.00	0.00	0.00	Temp	RL
Invoiced	O0PTTS00000015	0	Martin, Ricky	1011 Kemp Lane	09/30/2018	8.00	0.00	0.00	0.00	0.00	Temp	RL
Invoiced	O0PTTS00000005	0	Test, Leslie	1005 Kemp Lane	09/23/2018	8.00	0.00	0.00	0.00	0.00	Temp	RL

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

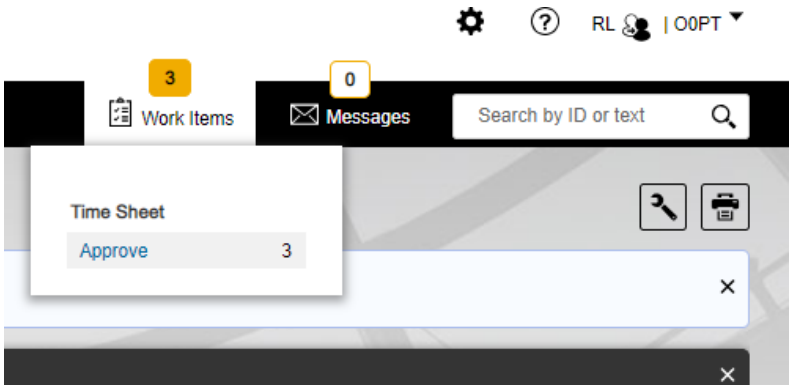


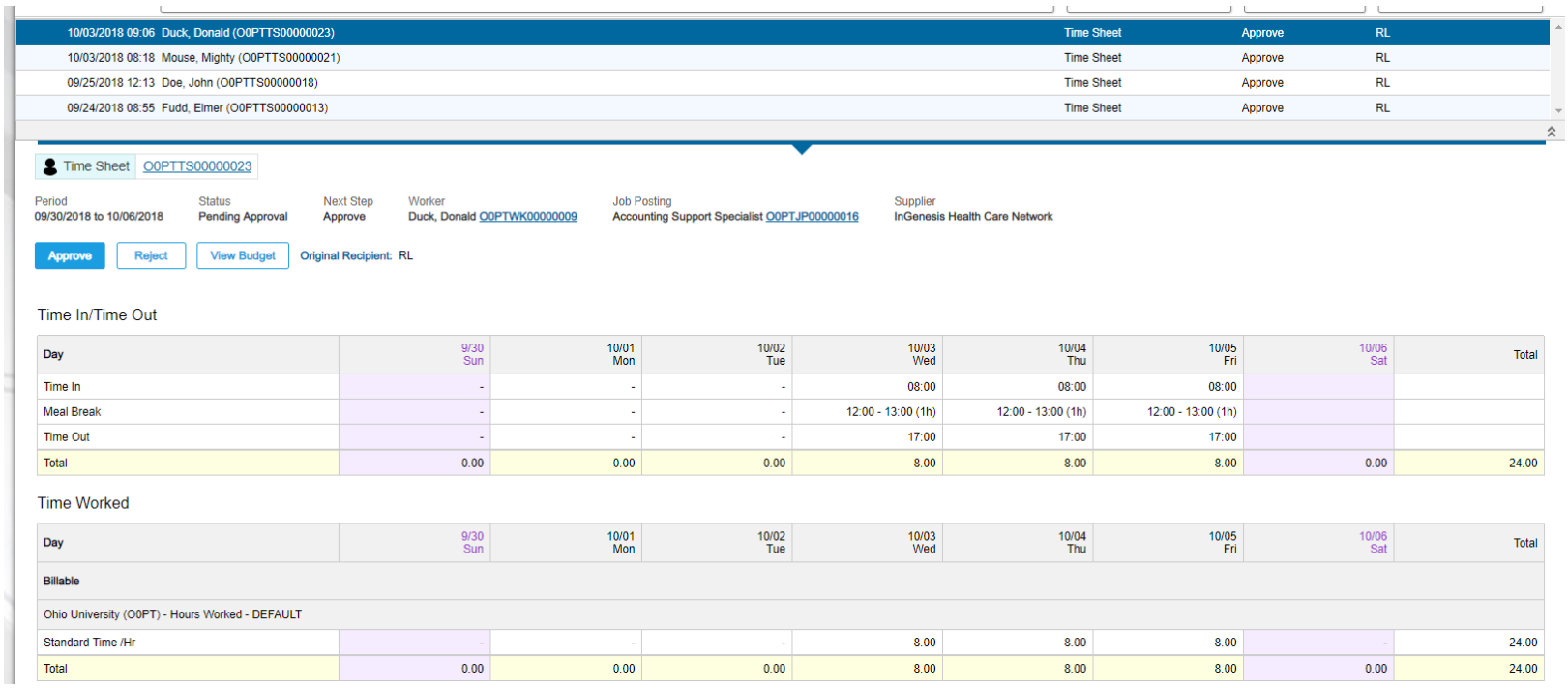
Worker	ID	Revision	Site	Primary Cost Center	Supervisor	End
Enter Criteria	Enter Criteria		Enter Criteria	Enter Criteria	Enter Criteria	
Test, Leslie	O0PTTS00000019	0	1005 Kemp Lane	Ohio University	RL	10/07/2018
Doe, John	O0PTTS00000020	0	Beckley Building	Ohio University	RL	10/07/2018
Mouse, Mighty	O0PTTS00000022	0	Academic Center	Ohio University	RL	10/07/2018
Test, Leslie	O0PTTS00000014	0	1005 Kemp Lane	Ohio University	RL	09/30/2018

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

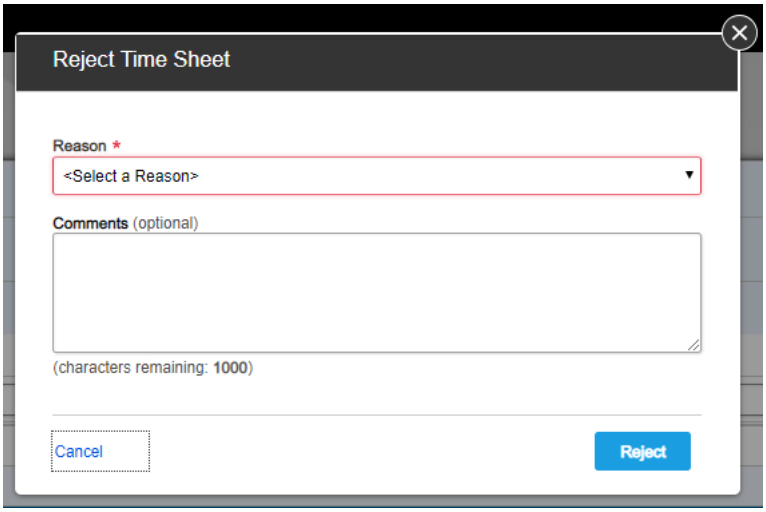
APPROVE/REJECT TIME SHEETS

1. To approve/reject timesheets, click **Work Items,**then under time sheet, click **Approve.**





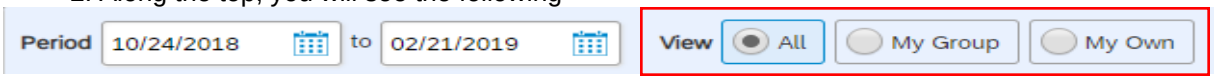
2. Once you review the submitted timesheet, you can either click **Approve**, or **Reject.**
3. If you **Approve,** the timesheet will move through the approval process
4. If you **Reject,** you will be required to select a reason for the rejection, and may add comments if desired. The timesheet will go back to worker for revision and then they can resubmit the timesheet.



View all Workers/Work Orders within Your Specified Planning Unit

From the View tab, you will have the option to view all workers and work orders within the business units you have access to. To view all, follow the steps below:

1. Go into the worker or work order modules from the View Tab
2. Along the top, you will see the following



3. Click View:ALL, to see all items within your business unit
4. Click View:My Own, to see only your items

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 ohio@ingenesis.com with any concerns

www.fieldglass.com/contact