

Browse the Book

In this chapter, you'll explore the core modules that form the SAP Fieldglass architecture. You'll see how process modules like statements of work and profile workers support procurement, and you'll learn about peripheral modules like decision forms and wizards.



"System Architecture: Processes and Modules"



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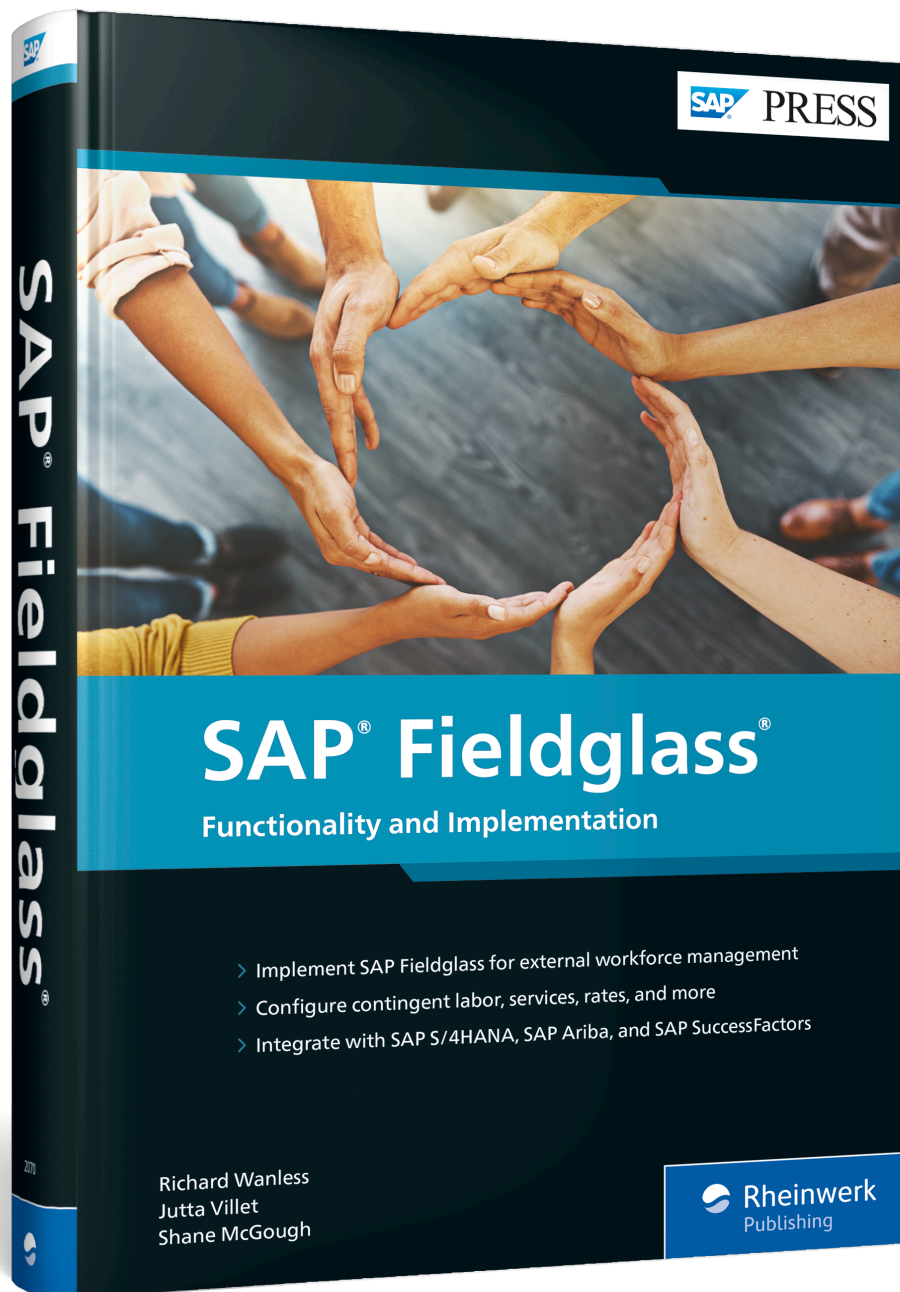
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Chapter 2

System Architecture: Processes and Modules

SAP Fieldglass is built up in modules that define the structure of the system. Together, all modules form the system architecture and ensure that procurement processes run smoothly.

SAP Fieldglass is a *vendor management system* (VMS) that you use to manage external workers. These nonpermanent and nonpayroll workers can be categorized into three types: contingent workers, statement of work (SOW) workers, and profile workers. The procurement and administration process of these external workers is mapped in *procurement processes* that follow the specific needs of each of these worker types.

For these processes to be captured in SAP Fieldglass, it's necessary to have a system architecture that controls settings and functions. This structure is represented by *modules*. All modules together form the architecture of SAP Fieldglass and enable the execution of the procurement processes. In this chapter, you'll learn how modules determine the SAP Fieldglass architecture and their role in defining procurement processes.

2.1 Access and Modules

With a little imagination, the combination of processes and modules can be explained using a house as an example. To get to your house, you can go different ways. You can either be guided by signposts in the form of *decision forms* or *wizards*, or you can use *projects* (see Section 2.3).

Alternatively, go directly to the entrance that you know contains the correct process for you. There are three entrances to your SAP Fieldglass “house” that allow external workers to “come in,” one for each procurement process: contingent labor (see Section 2.2.1 and Chapter 3), SOW (see Section 2.2.2 and Chapter 4), and profile workers in the profile workers module (see Section 2.2.3).

The foundation of your system architecture is the company structure (see Chapter 5). The walls are made up of base modules that you use to build rate settings (see Chapter 6), time sheets and expense sheets (see Chapter 7), and compliance (see Chapter 9). You can decorate your house with custom fields and use approval groups to control access.

Your “home phone,” which you use to communicate inside and outside the system, is made up of the messaging and the principle of social enterprise (see Chapter 8). Your “roof” is composed of the reports and analytics (see Chapter 10) that give you an overview of what’s happening in the system. You can clean up your house and remove data from the data retention or dispose of it altogether (see Chapter 11). And last but not least, you can connect your own house to other houses in your wider system landscape using integrations (see Chapters 12–15).

As mentioned previously, you use SAP Fieldglass to map procurement processes. To do this, you must configure the system in many individual modules. Modules are all basic settings and records in SAP Fieldglass. Configuring the system means setting up and aligning all these modules. For the sake of simplicity, the modules can be divided into three types:

■ **Process modules**

Process modules are parts of procurement processes that, if properly assembled, create an effortless system flow to create and manage the contingent workforce (see Chapter 3), SOW workers (see Chapter 4), and profile worker modules (see Section 2.2). Transactions and documents that describe a process always have a unique system ID that can be used to reference and search with in SAP Fieldglass. For a work order, this is, for example, COREW000000027 (see Section 2.2).

■ **Peripheral modules**

Peripheral modules accompany and support process modules: decision forms (with wizards) and projects. They are used to help users select the procurement process. These secondary processes aren’t necessarily essential in every company and are primarily used to initiate processes, guide users through the system, and adhere to company policies. These peripheral modules also have a system ID. All peripheral modules are described in Section 2.3.

■ **Base modules**

Base modules are standard configurations and features that are required to enable the processes. To do this, they must be set up and maintained according to the company requirements. All nonprocess modules are base modules. Base modules have a special meaning because they are used across all procurement processes and are set up centrally in the admin configuration. They don’t have a system ID, but a unique code that can only be used once in each module. If you, for example, want to create a site (e.g., Toronto in Canada), you can only use the CAN_Toronto once as the site code. Base modules include all enterprise structure modules, rates, and invoicing, as well as users and user roles. They can be configured independently of processes. The special features of the base modules are their *associations* that decide, for example, which settings are available in which country, in which currency, and in which business unit. In Part II of this book, you’ll read more about the main functions and the configuration of the base modules.

The concept of modules is essential, and if you’ve embraced it, you’ll improve not only your understanding of SAP Fieldglass but also your organizational structure, your users, and your reports.

2.2 Procurement Processes

Process modules are central components of work processes that cover core procurement processes and map the process steps. The procure-to-pay process includes contingent labor as process modules such as job postings, job seekers, work orders, workers, and time sheets. They are basic prerequisites for using SAP Fieldglass and can’t be skipped. This means that if you don’t formulate job postings, job seekers can’t be submitted against them, and if you don’t create a work order, workers won’t be able to submit time sheets.

Modules are essential when creating reports, creating custom fields, and configuring user roles. By selecting the base modules or process modules, you define the starting point for assigning and accessing the data (see also Chapter 3, Chapter 4, and Part II of this book).

Worker records and process documents can be accessed in SAP Fieldglass at any time using a unique system ID that consists of a four-digit company code (e.g., CORE), a two-character module reference (e.g., WO for *work order*), and a consecutive eight-digit number. See Table 2.1 for a list of the most-used module references. English abbreviations are often used to refer to the items, such as TS for *time sheet*.

Module Reference	Module Name
CI	Consolidated invoice
PA	Decision form
ES	Expense sheet
IN	Invoice
JP	Job posting
JS	Job seeker
MI	Miscellaneous invoice
PW	Profile worker
PJ	Project
TQ	Statement of work

Table 2.1 Reference Codes for Documents and Transactions, Supplemented by a Sequential Eight-Digit Number

Module Reference	Module Name
RW	Wizard
TS	Time sheet
WO	Work order
WK	Worker
WF	Workforce

Table 2.1 Reference Codes for Documents and Transactions, Supplemented by a Sequential Eight-Digit Number (Cont.)

Figure 2.1 shows an example of an SAP Fieldglass system ID of a work order (WO). This combination is only assigned once in the system and can be searched for at any time using the search function or the digital assistant to process the relevant document.

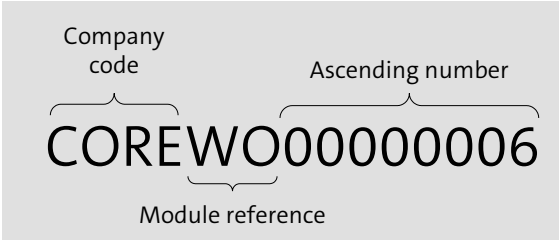


Figure 2.1 System ID Consisting of Company Code, Module Reference, and Sequential Number

In Figure 2.2, you can see the header of a worker record created in SAP Fieldglass. Here you can see the following system IDs and information:

- Andrew is a contingent temporary worker (**T WORKER**) with the **COREWK00000020 Worker ID**.
- The ID is associated with a specific job posting with the **COREJP00000044 Job Posting ID**.
- The worker has a work order assigned with the **COREW00000027 Work Order ID**.
- The worker’s **Status** is **Open**, which means his work order is currently valid and continues until the end of the engagement period.
- **Period** displays the date range in which the external worker is engaged.
- **Supplier** indicates the provider who supplied the external worker to the buyer company.
- For ease of reference, the **Master Worker Record ID** and the **Earliest Start Date** are displayed. If used, these functionalities can support compliance and tenure tracking.

For the sake of simplicity, all system IDs that are logically assigned to the system ID **COREWK00000020** are displayed in the data record of this worker. For quick access, they are linked to the respective document (blue background).

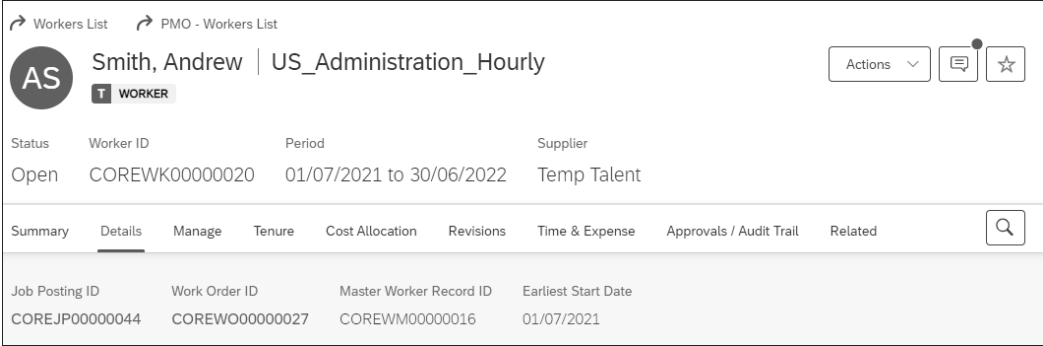


Figure 2.2 Displaying a Worker Record with System IDs, Status, Engagement Period, and Supplier

When you search for transactions and documents in the system, you don’t have to enter the complete system ID, for example, **COREW000000027**, but the module reference and the unique number, for example, **W027**.

In the next three sections, we’ll use process examples to show you how base and process modules interact with SAP Fieldglass in daily work.

2.2.1 Contingent

External workers are most often classified as contingent workers, but they can also fall in the categories of external consultants, independent contractors, or freelancers. The process of procuring external workers involves more than the actual recruitment process, so a number of modules that manage the supporting processes and data are set up and used in the system background.

The core of the contingent lifecycle is this: to request external workers, you first create a job posting that is distributed to selected suppliers. A job posting includes the estimated duration and period of the engagement, a description of the tasks and requirements, and the site. The supplier can then submit suitable job seekers who, after they have been selected by you, receive a work order and become external workers. During their assignment, these workers can submit time sheets (times) and expense sheets (expenses) from which invoices are generated. At the end of the contract’s term, the work order can be extended or closed. (For details and options about this process, see Chapter 3; in this chapter, it’s important that you recognize the process in the process modules in Figure 2.3.)

In the lower area of Figure 2.3, you can see the base modules that are used to procure external workers. In the upper area, you can see process modules and peripheral modules and how they are linked to each other.

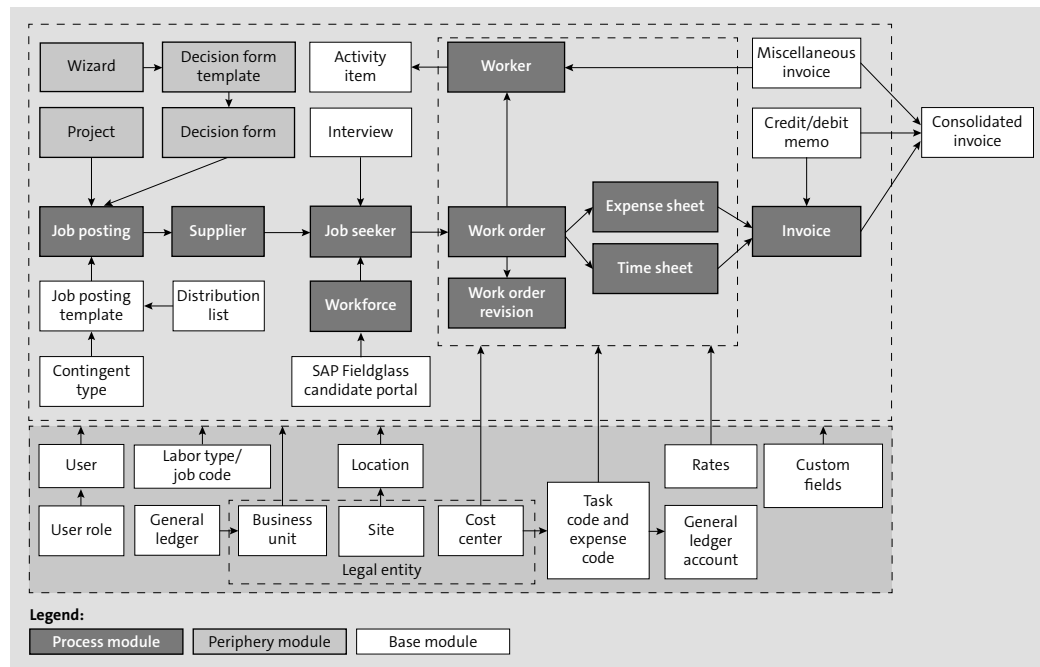


Figure 2.3 Systems Architecture and Modules of Contingent Workforce Procurement

Peripheral modules are decision forms, wizards, or projects that help users select and create their requests. Global, regional, and local settings are entered in the base modules. Of course, this includes the company structure (see Chapter 5), but other settings also play a role, which you'll learn more about in Part II. For example, the supplier is associated with a distribution list, which is anchored to a job posting template. Rates are grouped together in a grid and group (see Chapter 6), and custom fields are managed centrally (see Chapter 8).

Processes and the associated modules are subject to a *module hierarchy* and can only be set up and viewed in sequence. The logic can't be skipped or run backwards; it can only be run hierarchically and sequentially (continuous). This means that you can't create a work order without a job posting record or create an invoice without a related time sheet or expense sheet. You should also refrain from building a report to view pending external workers on the workers module and rather select the work order module, as worker records are only created after the work order is fully approved and the (auto-matic) external worker registration is completed. Keeping the module hierarchy in mind will make it easier for you to use functions such as linking custom fields (see Chapter 8) and creating reports (see Chapter 10).

2.2.2 Statements of Work

The SOW module captures contract types for the use of external workers in *service contracts*. The operational sourcing for the ideal supplier is supported by a SOW bid functionality, which precedes the SOW creation.

The main difference between the contingent and SOW processes is that the SOW module can use alternative invoicing methods, apart from time sheets and expense sheets. SOW invoicing can be triggered outside of the worker-specific work order, based on deliverables such as through schedules, events, or fees. In addition, contract elements are captured in management events and clauses. A detailed description of these characteristics (also known as line items) and their invoicing can be found in Chapter 4.

In the SOW module, the base modules, specifically the company structure (site, cost center, legal entity, and business unit) that you see in the lower part of Figure 2.4, provide the foundation for the process above. You can trigger the creation of a SOW contract through a project or decision form with embedded wizard (peripheral modules) or directly as a SOW bid (process modules). When creating a SOW, you first specify details such as time period, scope of work, and site. You also enter the characteristics, such as fees, events, schedules, management events, or clauses. When you add SOW workers to the SOW, they receive a work order and can submit time sheets and expense sheets, if permitted. All these line items can be the basis for invoice creation.

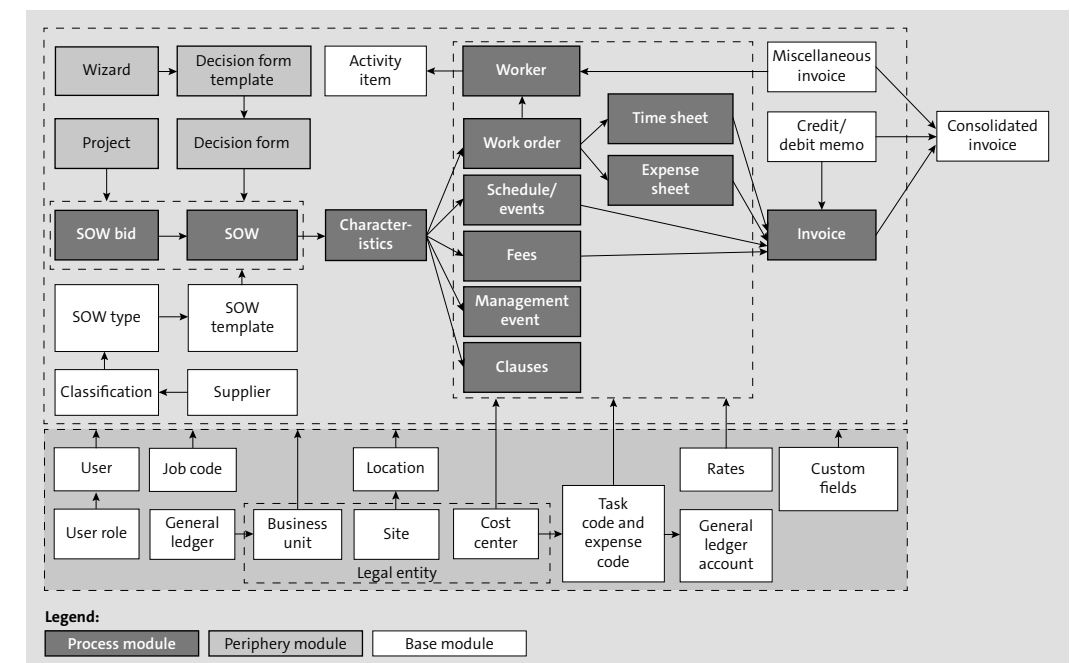


Figure 2.4 Systems Architecture and Services Procurement Modules: Bid and SOW

SOW bids and SOWs are determined using classifications, SOW types, and SOW templates. For information on how to set them up, see Chapter 4, where you'll also see a detailed view of the workflow.

2.2.3 Profile Worker

Most companies have external workers that they want to have sight of but don't manage through the procurement and invoicing process in SAP Fieldglass. Examples include staff in cafeterias, call center agents, auditors, consulting doctors, professors, and even researchers or visitors. Companies want to know who these externals are, and, most importantly, they want to ensure that everyone goes through appropriate onboarding and exit processes (see Chapter 9 for details on compliance).

A worker who is simply tracked is referred to as a profile worker in SAP Fieldglass. These workers' profiles are created by companies for tracking and compliance purposes only. Their personal profiles are kept in the system for visibility, tracking, and documenting overall headcount, holistic reporting, and traceability of activity items.

You can also see this in Figure 2.5. There is only one simple process module for procuring profile workers, supported by the peripheral *decision form* module, optionally with a wizard.

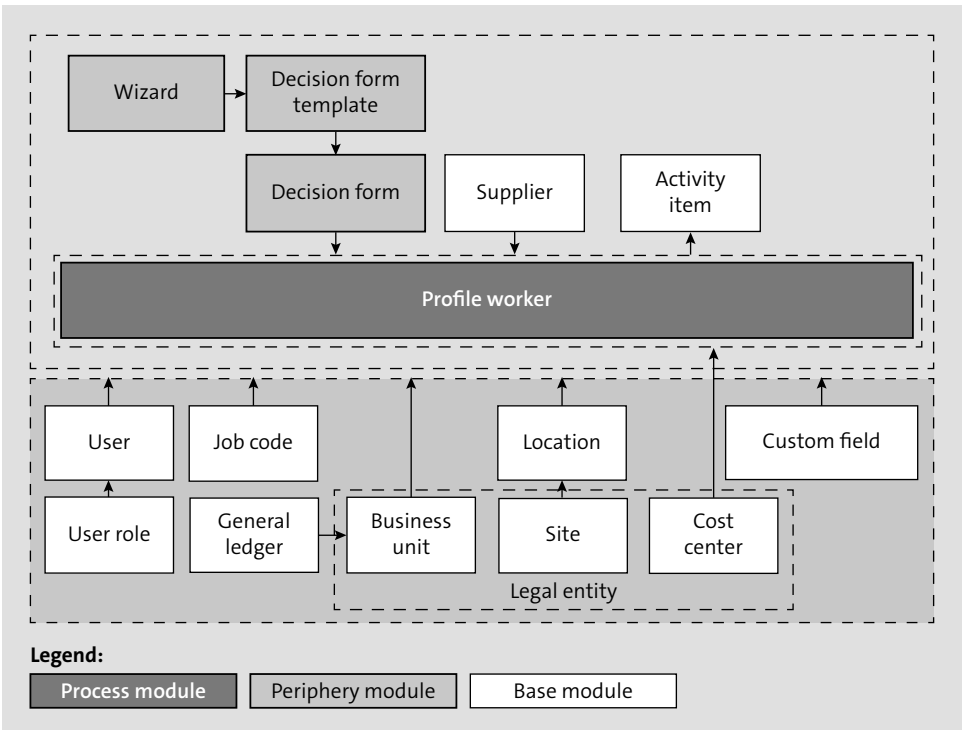


Figure 2.5 Systems Architecture and Modules for Profile Workers

The *supplier* and *activity items* base models can be included. The base modules at the bottom of the graphic are similar for contingent and SOW workers; they are the foundation of the system, the company structure, and your processes.

Profile workers aren't associated with a job posting or SOW and don't enter time sheets (time) or expense sheets (expenses). Therefore, they typically don't log in to SAP Fieldglass unless they complete activity items as part of their onboarding or offboarding.

In addition to no invoicing for profile workers, there is a second major difference: profile workers can be created and managed by transactional and nontransactional suppliers, whereas other external workers can only be managed by transactional suppliers.

There are two types of suppliers in SAP Fieldglass: transactional suppliers and nontransactional suppliers. *Transactional suppliers* actively use SAP Fieldglass to manage their workers and work items. They are mandatory to engage in contingent worker requirements and SOWs. *Nontransactional suppliers*, on the other hand, are for reference only and don't have their own company profile. For more information about creating and managing suppliers, see Chapter 5.

Profile Worker Suppliers

Nontransactional suppliers (for profile worker sourcing) can't be retroactively transformed into transactional suppliers (used for contingent labor and SOWs). Therefore, it's advisable to always create suppliers as transactional suppliers if you assume the supplier might extend their scope to other modules.

[+]

Profile workers are often integrated with headcount management systems so they can be tracked as nonbillable resources as part of a *total workforce management* strategy. The profile worker process module makes it possible to track and manage external workers across geographic regions and across different business areas; it's also used as *security as a service* to keep track of external workers not only physically but also legally.

In combination with the *master worker record* (MWR), external workers can be tracked in the system across modules and assignments using security and identification points. This allows customers to track contingent workers and their engagement as contingent workers, subcontractors, or profile workers without any gaps. The benefits of monitoring the (maximum) duration and type of contract are obvious as tenure tracking is an important legal requirement in many industries and regions. The **Master Worker Record** company configuration can only be enabled for companies that also use the **Enable Security Information** company configuration, which enables the use of the security ID. For more information about security ID, see Chapter 5.

If legal entities are used in the company, they can also be applied in the profile worker module. Two validation rules are available for this: either you can use the same validation used for the contingent, or you don't use a legal entity as validation.



Module Functionality Limitation

The profile worker module is simple and straightforward in its structure. Therefore, the following functions that you can use for contingent and SOW workers aren't available here:

- There is no coordinator role per se, but there is a primary contact and supervisor who manages the profile worker.
- The module isn't part of the program management office (PMO) dashboard that shows you pending approvals or outstanding activities (for more information, see Chapter 10).
- There is no activation of the external workers after they have been created because profile workers only exist passively in the system.
- When using the activity checklists to map onboarding and offboarding activities, it's not mandatory to assign them to profile workers (see Chapter 9 for more information).

The process of managing profile workers has five steps, as shown in Figure 2.6:

1. Either the supplier, PMO, or buyer (also referred to as hiring manager) creates the profile for the external workers.
2. Once created, the approval will follow, which is defined in an approval group (see Chapter 8).
3. After that, the profile worker is created, and the compliance tasks in the form of onboarding can be performed if needed.
4. Changes are easily made to the data record, for example, a new primary contact or a new association to other business units or sites. These revisions are indicated by the addition (**Rev 1**) next to the system ID. These changes are followed by possible further approvals.

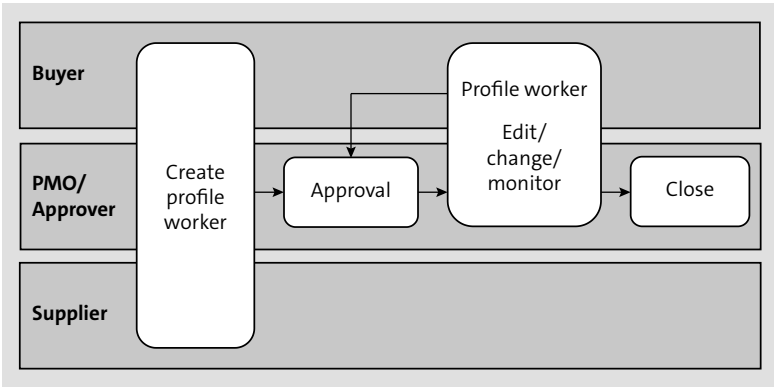


Figure 2.6 Creating and Managing Profile Workers

5. The profile worker record is closed at the end of the engagement period either manually or automatically by the system. The data record can then no longer be changed unless it's opened again.

As mentioned at the beginning, the module for managing profile workers is straightforward and clear. The creation includes a few clicks on a single page. Depending on the configuration and workflow, profile workers can be created by internal buyer users (e.g., the responsible hiring manager or PMO team) or by external supplier users. Navigate to the **Create** panel on the homepage, and select **Profile Worker** to create a profile worker as an internal buyer user.

In Figure 2.7, you can see the finished record of a profile worker. There are only a few mandatory fields when creating the entry: first name and last name, an email address, start and end dates, site, business unit, cost center, and legal entity (if you're using them). You may see custom fields, the **Job Code** field, or contextual help if it has been set up (see Chapter 8).

Status	Next Step	Profile Worker ID	Period	Supplier
Pending Approval	Need to approve	COREPW00000013 (Rev. 1)	01/08/2021 to 31/07/2022	Profile Worker Supplier

Success! Profile Worker has been updated.

Details Tenure Revisions Approvals / Audit Trail History Related

Posting Information

Start Date	01/08/2021
End Date	31/07/2022

Worker Details

Buyer Reference	
Supplier Reference	
Job Code	0000232
Primary Contact	John Smith
Creator	Peter Wild
Site	US_New York
Location	US_New York

Figure 2.7 View of a Profile Worker Record

There are two fields for selecting *system roles* that can be used later in messaging, approval groups, and performing activity items: **Primary Contact** and **Supervisor**. The **Primary Contact** field is a mandatory field used to determine the responsible person (manager). The selection and use of the **Supervisor** field is optional; a substitute manager can be specified here. If you use a managed service provider (MSP) or PMO team to manage your profile workers, it's advisable to enter a member of the PMO in the **Primary Contact** field and the respective manager in the **Supervisor** field. As a result, the workload and administration of the profile worker have been moved to the MSP team, but the manager still has access to the data record in each case.

The **Job Code** field has two applications: (1) for integrations with other HR software and for merging job titles across modules for reporting purposes, and (2) as a way to assign activity checklists to the contractor across all procurement processes.

A **Yes/No** selection populates the mandatory **Auto Register Worker** field. If you choose **Yes**, the profile worker is automatically created in SAP Fieldglass. If you choose **No**, external workers must register manually. The latter is necessary if a profile worker needs to complete activity items. Classic examples of activity items are proof of qualifications, safety instruction, and IT security checks.

After processing, the data record for the profile worker is created, as you can see in Figure 2.7. This record is similar to contingent and SOW worker entries. Here you also see the automatically assigned system ID (**Profile Worker ID**) with the company code, the abbreviation **PW**, and a sequential eight-digit number. *Approvals* may be required after the profile worker record is created. They are controlled by approval groups (see Chapter 8).

If you’ve made changes to the data record, you see a sequence number (**Rev. 1**) behind the system ID in parentheses, which you can use to track the revision version chronologically (you can then access and compare the different versions of the profile worker data record on the **Revisions** tab). In the **History** tab, you can see the individual changes done during the profile worker edit process. To see the tab, you need to enable the **Feature Access** in the user’s individual user profile by ticking the **View History Tab** checkbox. (You’ll learn more about user profile settings in Chapter 5.) The **Approvals/Audit Trail** tab allows you to monitor the workflow.

You can manually close the profile worker at any time by clicking **Close Profile Worker** in the **Actions** dropdown menu on the record. Alternatively, the record can be automatically closed when the end date is reached or a specified number of days has passed. The latter is embedded in the company configuration and must be enabled/disabled or changed by SAP Fieldglass support. After you close the profile worker record, you can choose **Reopen** to restore the record, edit it, and make changes to the end date if necessary.

Use reports based on the worker or activity and offboarding activity base modules to track and verify profile worker data. Adjust the fields and filters so that the profile workers are displayed. For more information about reporting, see Chapter 10.

2.3 Peripheral Modules

In SAP Fieldglass, there are several ways to help the buyer choose the right procure-to-pay process. Buyers can directly create a request for contingent workers, SOWs, and profile workers. On the other hand, depending on the customer’s user group, knowledge level, and compliance requirements, you can also make decision forms and, if

necessary, an integrated wizard or questions available within your company. Projects can be used to summarize SOW bids, SOWs, and contingent workers into one budget. These three peripheral modules are upstream of the actual procurement process and act as starting points and can be configured individually. We’ll discuss each in more detail in the following sections.

2.3.1 Decision Forms

Decision forms are mini questionnaires that enable buyers (also referred to as managers in this section) to make it easier to select the right procurement process. Decision forms are based on templates in which an administrator determines the format, questions, and answer choices.

Decision forms are highly customizable, allowing you to capture all the company-specific information needed to make external workforce procurement decisions. Various tools are available for creating decision forms that allow you to adapt decision-making processes to your business needs, including incorporating wizards and questions.

Wizards and questions can also be used in a variety of ways, regardless of the decision form templates, for example, for supplier evaluations or questionnaires. The decision form only supports the selection of the starting point of a matching requirement request, for example, job posting, SOW, or SOW bid.

In Figure 2.8, you can see the typical lifecycle of a decision form. The manager (or PMO) creates the decision form. It’s then routed (optionally) for approval according to your predefined approval group. Typically, approvers are groups of people who monitor that a requirement request is created in the correct procurement category.

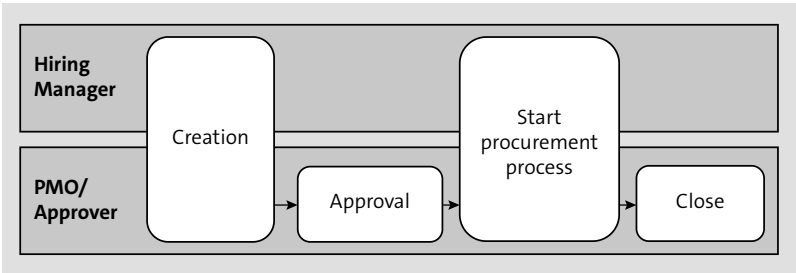


Figure 2.8 Creation and Management of Decision Forms

Once approved, the procurement process referenced by the decision form can be started and subsequently closed. As you can see, the decision form isn’t a standalone procurement process, but it supports choosing the right category, getting approvals for the demand request, or helping the requester define the correct procurement type. As the decision form is always bound to a procurement type, these decisions can be audited in connection to a specific sourcing event.

To create a decision form, you must first create a decision form template. To create a new template document, go to **Admin Configuration • Decision Form – Template • New**. In Figure 2.9, you can see a completed template. In addition to the name and an optional description, you can select the sourcing options you want to be available after completing the form, such as a project, SOW, or job posting.

Admin Configuration / Decision Form Template List / Decision Form Template / Details

Decision Form

EditRemoveNew

Decision Form Template

Details

Business Units6

Details

Name	Decision Form
Description	
Associate all Business Units	No
Statement of Work	Yes
SOW Bid	Yes
Job Posting	Yes
Profile Worker	Yes
Project	Yes
Other	No
Allow multiple of the Procurement Type outcome to be created	No
Named Resource	No
Wizard	Wizard: Decision Form

Rules

Use Scoring	No
Display Procurement Types to Requestor	No
Show in Create Menu	Yes
Require Budget Amount	No

Questions

Question	Answer Type	Mandatory	Sort Order
Is the use of the Worker mission-critical?	5 Point Rating	No	1

Figure 2.9 Decision Form Template with a Wizard and a Question

Optionally, you can add a wizard or questions to the template. You can use **Rules** to specify whether you want to use the following settings:

- **Use Scoring**
This rule can be used to assign a score to each question. Responding to all questions on the decision form results in an overall score that can be used to route the decision form for approval.

- **Display Procurement Types to Requestor**
This rule will display all procurement options on the decision form that can be selected there by the creator.
- **Show in Create Menu**
This rule causes the decision form template to appear as an option in the **Create** menu on the user’s homepage.
- **Request Budget Amount**
This rule determines that a budget amount must be entered on the decision form.

Decision Forms and Templates

Here are some valuable tips on how to work with decision forms and templates:

- The decision form template can be individually associated with business units.
- Set up messaging to support the workflow with messages and work items.
- Contextual help can be used to make the decision form easier to use.
- A decision form has its own approval group, and the form can be withdrawn, closed, or renamed.

To create a decision form, the buyer user acting as the requester must be associated with a user role that has the **Submit Decision Form** permission. To create and manage user roles, see Chapter 5.

In practical application, the decision form is conceivably easy to draw up. To do so, open the **Create** menu on the homepage, and select **Decision Form** from the list.

The decision form captures key, mandatory information of your procurement request: start and end date, business units, site, and cost center. In Figure 2.10, you can see how questions and the wizard are embedded and displayed in the decision form.

The question **Is the use of the worker mission-critical?** doesn’t lead to a selection but is only used to find out from the creator how important the position to be filled is. Importance can be given as an answer on a scale of 1 to 5 stars.

The questionnaire below the question with the star rating is a wizard, embedded within the decision form. Each question of the wizard has at least one answer option that leads to another question or determines the selection of the sourcing process and completes the questionnaire.

After you’ve filled out all the fields and answered the questions or completed the wizard, you can submit the decision form. An approval procedure is then triggered if you’ve set up an approval group in advance (for information on how to do this, see Chapter 8, Section 8.6.3).

Questions

Is the use of the worker mission-critical? (optional)
☹️ ⭐⭐⭐☆☆

Wizard: Decision Form

✓

Do you need the external worker as part of a project?

No

Clear Answer

✓

Do you bill the external worker based on time sheets (hourly, daily, monthly)?

Yes

Clear Answer

🏁

Wizard: Decision Form Completed

🏁

You have completed the Wizard.
You may now continue with the rest of the form below.

Figure 2.10 Completing the Decision Form from the Buyer User Perspective

After creation and (optional) approval, users are then asked to start the procurement and create a sourcing document (see Figure 2.11). The module that appears is based on your wizard response action settings; in our case, it’s **Create Job Posting**.

For companies that are adopting SAP Fieldglass as their new VMS, there are many benefits to helping users choose their procurement processes with decision forms. In addition, questions and wizards can be used in a variety of ways, including entering data in custom fields and evaluating suppliers and workers.

Decision Forms List

Decision Form

DECISION FORM

Recall Create Job Posting Actions

Status	Next Step	Decision Form ID	Period	Primary Business Unit
Submitted	Need to create a Job Posting	COREPA00000003	01/07/2021 to 30/06/2022	Consulting

✓ Success!

Decision Form has been submitted.

Details Approvals / Audit Trail Related

Accounting (USD)

Decision Form Details

Budget Amount1,000,000.00

Cost Allocation93582_Operations (93582)

Buyer ReferenceEdit

Description:-

Figure 2.11 Decision Form with the Request to Create a Job Posting

2.3.2 Wizard

The *wizard* is used to ask users a number of company-specific questions, and, based on their answers, a recommendation for the next action is made. SAP Fieldglass supports users with the wizard as part of the decision form, for example, when deciding which procurement option to use, the wizard directs the user to the correct procurement type (e.g., job posting creation). When used as part of activity items, wizards can evaluate workers or suppliers. However, wizards can also simply be used as detached assistants to help buyer users with procurement choices without a guided action as outcome.

We’ll get started creating wizards and questions in the following sections.

Set Up a Wizard

You need to set up this assistance feature in SAP Fieldglass, and it can be tailored to your company’s needs. Choose **Admin Configuration • Wizard**, and first give the new wizard a **Name**. From the **Starting Point** dropdown list, select where in the process you want to include the new wizard you want to create:

- Decision Form
- Home Page and Create Menu
- Decision Form, Home Page, and Create Menu
- Job Posting
- Statement of Work
- Evaluate Suppliers
- Evaluate Worker
- Questionnaire

After selecting the starting point, you can add questions and custom fields that you created in advance in the **Questions and Fields** panel.

Job postings and SOWs can include wizards. To do so, the job posting or SOW must be based on a template that has an embedded wizard. To learn more about such templates, refer to Chapter 3 and Chapter 4. When you create a job posting requisition, the default questions and answers from the wizard become part of the job posting or SOW. This enables you to significantly improve both the user experience (UX) and the accuracy of the entries because the quality of the entries isn’t based solely on the interpretation of custom fields but is guided by suitable questions.

You can also use the wizard to evaluate workers and suppliers. For this, the wizard can be included as part of the *activity items* to complete a worker or supplier evaluation. Therefore, if you create **Evaluate Workers** or **Evaluate Suppliers** as a starting point when creating the wizard, the result isn’t a sourcing option, but the evaluation questions are used to give an overall score to workers or suppliers. For more information about creating and using activity items, see Chapter 9, Section 9.1.



Multiple-Use Questionnaire

If you selected **Questionnaire** as the starting point, the wizard can be added to a question-based activity item.

Wizards can appear directly on the homepage in the **Create** menu when you select **Home and Menu Creation** or **Decision Form, Home Page, and Create Menu** as your starting point. If you use the wizard as a freestanding guide on the homepage, it's only used as a questionnaire, without the result it has, for example, on a decision form for creating a job posting or SOW. For a homepage, the wizard is only a help for users without automatically directing them to create a document. After using the help of the wizard, the respective procurement process still has to be started separately on the homepage in the **Create** menu.

However, the most common use of the wizard function is on the decision form. To create a wizard for that purpose, you have to follow these steps:

- 1. Create questions from the **Admin Configuration** menu that you want to use on the decision form (see the next section).
- 2. Create the wizard that can be used in the decision template by clicking **Admin Configuration • Wizard** and using the resulting menu.
- 3. Name the wizard, and you can see the view shown in Figure 2.12. In this case, in the **Starting Point** field, the **Decision Form** has been selected from the dropdown list, and you're now using **Add Questions or Fields** to add the questions or fields you created previously.

Starting Point *

Decision Form

Questions and Fields

×	Answer	Default Value	Locked	Answer Action
×	# 1 Do you need the external worker as part of a project?			
	Yes			Create Statement of Work
	No			Go to question 2
×	# 2 Do you bill the external worker based on time sheets (hourly, daily, monthly)?			
	Yes			Create Job Posting
	No			End Wizard

Please contact the PMO team.

Remaining: 972

+ Add Questions or Fields

Figure 2.12 Question and Answer Actions in the Wizard

Each answer to a question has an **Answer Action**. In Figure 2.12, you can see how a different **Answer Action** can be assigned to each **Answer** option of the question. For example, for question **#1 Do you need the external worker as part of a project?**, the answer options are **Yes** and **No**. As a response action, you can guide users to create a SOW or point them to another question that will further qualify the action based on the response.

The following is a nonexhaustive list of answer actions available to you when configuring the wizard:

- **Create Decision Form**
To start a decision form.
- **Create Project**
To create a project.
- **Create Job Posting, Create Statement of Work, Create SOW Bid, Create Profile Worker**
To start a specific sourcing process.
- **Go to Question**
To go to another question.
- **Go to Wizard**
To start an embedded wizard.
- **End Wizard**
To display a text and exit the wizard.



End the Wizard

In the **End Wizard** field, not only can you enter text but also enter a link to a URL that is displayed to users after the wizard has been completed. To do this, use the following format (replace the abbreviation *URL* with the website to which you want to link):
`Click Here`

You can reuse a wizard that you've created in the past, for example, on another decision form.

Questions

Decision forms are based on decision form templates, which in turn typically contain a wizard. To be able to use the wizard in a targeted manner, you should create questions in advance to use in the wizard.

Questions are created by clicking **Question** in the **Admin Configuration** menu. Questions must be associated with a peripheral module—decision form or wizard—when they are created. This determines where the question can be used. Figure 2.13 shows a sample question that can be used in a **Decision Form**. In practical use, when creating a

decision form, this looks like the question with the star rating, as shown earlier in Figure 2.10.

If you choose **Wizard** as the module instead, you can use the question in a decision form template, which is then displayed as part of the decision form wizard. You saw this variant also in Figure 2.10 in the lower area with the green notes.

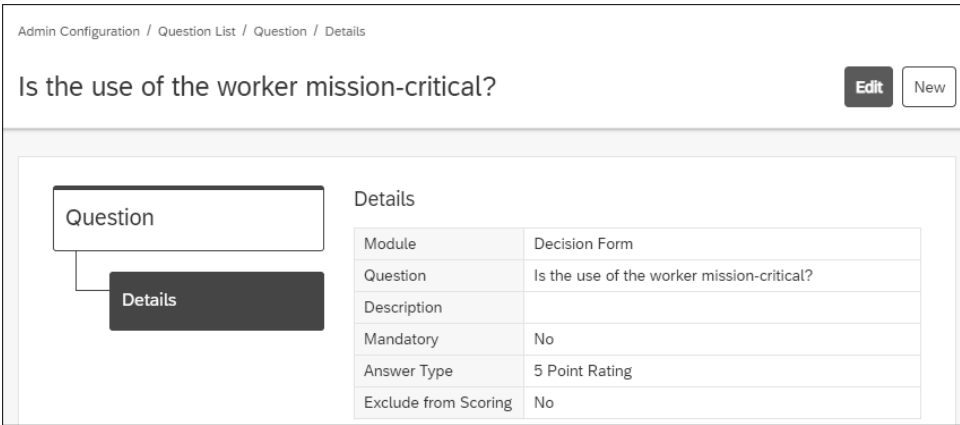


Figure 2.13 Creating a New Question on the Decision Form

After you’ve selected the module, enter the question. The question length can be up to 1,000 characters. You can specify whether a question must be answered or not by selecting **Yes** or **No** in the **Mandatory** category (in the latter case, answering this question is optional).

The responses are collected in different formats called **Answer Types**, which you can find in Table 2.2. Depending on whether the question is asked in a decision form or wizard, different **Answer Types** are available for selection.

Decision Form	Wizard
Yes/No	Yes/No
Text	Text
Text Area	Text Area
User Defined Pick List	User Defined Pick List
5 Point Rating	Date
Yes/No and Text Area	Number

Table 2.2 Comparison of Answer Types

Text is a versatile way to capture alphanumeric values and short information in responses. A *text area*, on the other hand, can contain a longer text for formulating the

answer. A *user-defined pick list* can specify answers, for example: Is there a specific certification needed? The *date* can record when a certain action, such as accreditation, was taken. A *number* measures numerical values, such as the number of workers the supplier currently represents to the buyer.

The **Description** field is useful to explain the scale of the evaluation when a 5-star rating is used. The **Exclude from Scoring** option refers to the scoring of the questions. If scoring is enabled, that is, if **No** is selected here, the answer is scored using a score that later flows into an overall score. The (overall) points rating can be, for example, used to give a rating for a question in worker or supplier evaluations and to support the repeated use of the worker or supplier. It’s based on the following point scale:

- Yes/No: Yes = 1, No = 0
- Descriptive: No scoring
- Yes/No and Descriptive: Yes = 1, No = 0
- 5-point score: 0–5
- Custom selection list: Users define a score for each predefined answer.

In Figure 2.13, you’ve seen what a question looks like after it’s been created. Here, you can review all the fields and edit the question, if necessary (via the **Edit** button), to change the information. Questions can never be used independently in the SAP Fieldglass system; they must always be associated with a wizard or decision form.

2.3.3 Projects

Wizards and decision forms are features that help buyers (also referred to as managers in this section) to choose the right source-to-pay process for a SOW bid. In addition, peripheral module projects support the budget planning of procurement processes.

Projects don’t lead managers to select a procurement type, but instead allow them to bundle a number of different procurement types into a higher-level project. You might wonder why you’d want that. Imagine that you have a large IT project with a significant overall budget that you, as a project manager, must not exceed. At the same time, you need to manage a variety of job postings, SOWs, and SOW bids. Of course, you can use reports and analytics to get an overview of the costs incurred to date and expected expenses. However, these reports don’t discourage anyone from consuming more from the overall budget than is available.

To actively manage the overall budget of your IT project, use the SAP Fieldglass projects module. This will bundle all job postings, SOW bids, and SOWs into a single entry. In addition, you can set the settings in the project so that the maximum budget can’t be exceeded.

If the projects module in the SAP Fieldglass business instance has been enabled in the SAP Fieldglass company configuration, you can create new projects in the user interface

(UI). To use the module effectively, you need to make sure some prerequisites are set up. How that is done is explained in more detail in upcoming chapters: create reasons (see Chapter 8, Section 8.5), define approval groups (see Chapter 8, Section 8.6.3), manage user roles (see Chapter 5, Section 5.9.1), and set messaging (see Chapter 8, Section 8.7.3).

The five project phases in the lifecycle of a project are shown in Figure 2.14:

1. The hiring manager or project manager on the buyer side creates a project that specifies a maximum budget and selects one or more suppliers and business units to associate with the project.
2. The project is then submitted for approval, if required.
3. Once approved, job postings, SOW bids, and SOWs can be created from the project. Alternatively, existing documents can be linked to the project by opening and editing the corresponding document to perform the assignment afterwards.
4. During the project, the person responsible monitors project expenses. If the maximum budget, associated suppliers, or business units need to be changed, this can be done at any time.
5. Finally, the PMO or the person responsible closes the project as soon as it's finished.

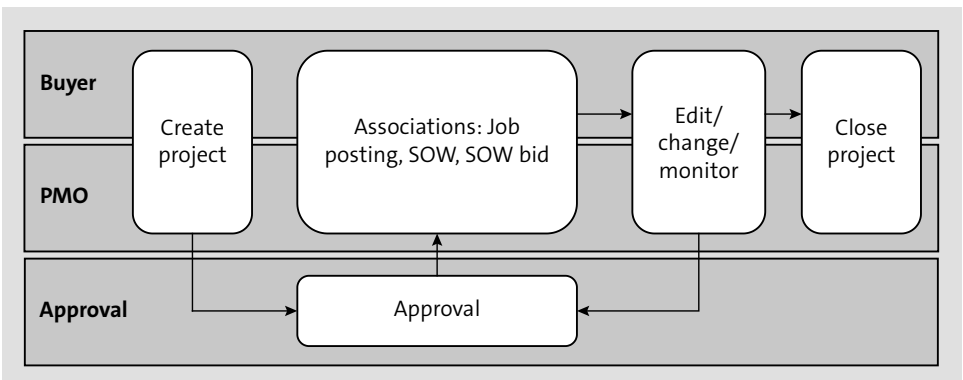


Figure 2.14 Lifecycle of a Project in SAP Fieldglass

To create new projects, navigate to the homepage in SAP Fieldglass. From the **Create** menu, select **Project**. The creation of a project is very clear and includes only core data, as shown in Figure 2.15. In addition to the name of the project and an individual code that you can assign only once, this includes its start date and end date. In the **Maximum Budget** field, specify the total budget available for this project. The **Business Unit** field is a dropdown list from which you can select the main business unit for this project. If you've activated multiple currencies in the system, you must select the currency that is valid for this project from the **Currency** dropdown menu.

In the **Owner** field, the person who created the project is selected by default, but you can change this using the dropdown selection. This person is the manager of the project in

SAP Fieldglass. Because this is a system role, it can also be included in approval groups (see Chapter 8). The **Define Project Suppliers** option offers a choice between **Yes** and **No** and indicates how the suppliers relate to the project (as explained later in this section). Finally, the project in SAP Fieldglass can have attachments, for example, budget-related benchmarks or a task-defined breakdown. You can assign custom fields to the project, which are displayed here, and enter additional information, such as reference numbers from a project management system. For more information about creating and linking custom fields, see Chapter 8.

Projects List

IT Projekt: Saturn

PROJECT

Status	Project ID	Period	Owner
Open	COREPJ00000004	01/01/2021 to 31/12/2021	Emily Fischer

DetailsBusiness UnitsSuppliersDocumentsApprovals / Audit TrailRelated

Accounting (EUR)

Maximum Budget	200,000.00
Committed Spend	0.00
Spend to Date	0.00
Other Pending Spend	0.00
Remaining Spend	0.00

Project Details

Name	IT Projekt: Saturn
Project Code	IT Projekt: Saturn
Business Unit	Information Technology (IT)
Define Project Suppliers	Yes
Description:	-

Edit History

Field Changed	Old Value	Changed By	Changed On
End Date	30/06/2021	Fischer, Emily	30/12/2020 23:12
Maximum Budget	100,000.00 (+100000.000)	Fischer, Emily	30/12/2020 23:12

Attachments

Name	Attached By	Visibility
Anhang_1.pdf (243.1 KB)	Emily Fischer 30/12/2020 11:14 PM	Public

Figure 2.15 Detailed View of a Project with the Accounting (EUR), Project Details, Edit History, and Attachments Areas

After the project is created, you can associate job postings, SOW bids, and SOWs that are referred to as **Documents** in this context. New requirement coverage requests can be created directly from a project via the **Actions** dropdown. Existing documents can be assigned retroactively and managed within the project budget. Project budget is mandatory for all related documents to drive committed spend for the project.



Projects and Profile Worker

Profile workers can't be added to a project. This is because projects are primarily dedicated to centrally managing budgets, and profile workers don't have a budget as they're only captured for visibility in SAP Fieldglass.



Standard Upload

The default connector for SAP Fieldglass projects can be used to upload multiple projects to SAP Fieldglass. This avoids the need to enter each budget individually via the UI.

After you've created a project, you can edit and close the project and its documents throughout the lifecycle of the project.

In the **Actions** dropdown, select **Edit Project** to edit the maximum budget and end date of the project when a project is in the **Open** status.

You can view changes in the **Approvals/Audit Trail** tab. Changes require approvals if the project has approval groups defined. To learn how to create approval groups, see Chapter 8, Section 8.6.3.

When you create a project, only one main business unit is selected. Additional business units can be added or removed from the **Business Units** tab. Business units added to the project after creation can only be removed if they aren't used in a related document. The business unit that was added while creating a project can't be removed from the project. All documents assigned to a project must use one of the assigned business units.

Supplier settings can be added using the **Define Project Suppliers** option during project creation. If you've selected **Yes** here, additional suppliers can be added or removed on the **Suppliers** tab. Only these selected suppliers can then be used for the documents created from this project. If **No** is selected for this option, suppliers are defaulted from the job posting template and SOW template (see Chapter 3 and Chapter 4, respectively).

Users with appropriate user role permissions can select **Actions • Change Owner** to change the manager for a project. This is only possible if the project has the status **Open**. You can only close a project if it has the status **Open**. To close a project, select **Close Project** from the **Actions** dropdown. If there are active work orders or SOWs in the project, a warning appears because when you close a project, you can't increase the maximum budget. However, you can also use the **Reopen Project** option in the **Actions** dropdown to make changes.

The **Maximum Budget** must be set when a project is created. Project budgets can be mandatorily specified for related documents to control the committed spend of all combined documents for the project. Although job postings can be created and approved if they exceed the project budget, a warning is displayed to the person who

creates them. The approval of work orders and SOWs (committed spend) depend on the spend remaining on the project.

Contingent labor and SOWs can be retroactively assigned to a project, that is, after they have been created and approved. Then, any committed spend existing on the document is added to the project's committed spend. A project's committed spend is updated only for the following:

- Work orders in one of the following statuses: **Approved**, **Accepted**, **Activated**, or **Confirmed**
- SOWs in **Approved** status

A job posting with existing work orders can't be assigned to a project if the committed spend of its work orders is greater than the remaining project budget.

To monitor project budgets, on the **Details** tab, you can find the budget-related fields displayed in the **Accounting** area, as shown in Table 2.3.

Budget Type	Description
Maximum Budget	The overall budget for the project
Committed Spend	The total sum of all approved work orders, SOWs, and associated revisions for the project
Spend to Date	The summarized spend for all approved but not yet invoiced documents as well as all billed documents associated with the project
Other Pending Spend	The pending spend for the project, including documents that have been approved but not yet reached the invoice level
Remaining Spend	The committed spend (spend to date + other spend for pending spend) applicable to specific contingent and SOW documents for a project

Table 2.3 Project Accounting Budget Definitions

To manage contingent and SOW on a common budget, you can create a project. Although the project module doesn't allow project management in the classic sense, managers and PMO teams have the ability to effectively monitor budgets and manage spending across modules.

2.4 Summary

In this chapter, you learned about the procurement processes of contingent labor, SOWs, and profile workers, and which process, peripheral, and base modules are assigned to them. You've also seen why the base modules form an important foundation and how they are available in the system across all processes. Furthermore, we

elaborated on the use of the peripheral modules and how they can guide and manage the procurement processes in SAP Fieldglass.

In the next chapter, we'll discuss contingent labor and the external temporary workforce procurement process.

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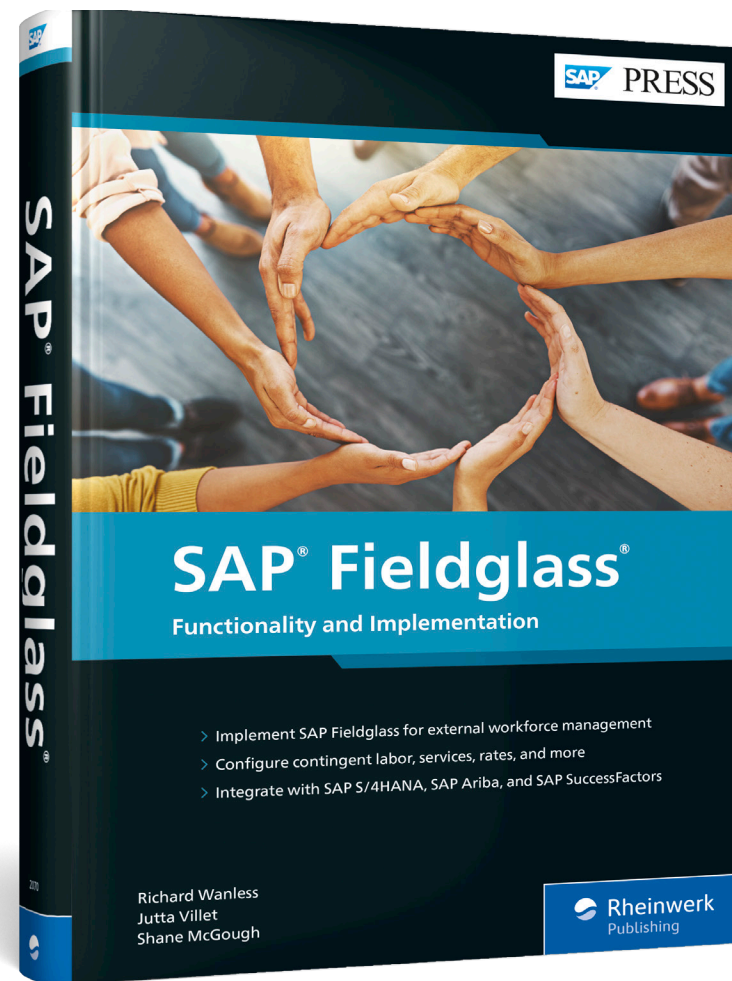
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