Fieldglass – Supplier User Manual

V. 3.0

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1. Document Information

1.1. Document History

Revision Date	Author	Version	Comment

1.2. Review History

Review Date	Name	Role

1.3. Approval History

Approval Date	Name	Role

2. Introduction

2.1. Document Purpose

This document will serve as a reference for SAP Fieldglass Suppliers. This document will be a general aid and provide instructions on activities of supplier users for the services procurement module.

2.2. Document Scope

This Supplier Manual will cover the roles and responsibilities of suppliers. This will include the activities done on Fieldglass and Fieldglass administration.

3. Key Fieldglass Terms

The following terms are used in this manual:

SAP Fieldglass Terminology	
Term	**Definition**
Buyer	The company or organization that requests services.
Contractor Access Agreement (CAA)	The agreement between SAP Fieldglass, Inc. and an organization that allows the organization's personnel access to the SAP Fieldglass application.
Statement of Work (SOW)	An electronic document created in the SAP Fieldglass application by the requestor organization that wants to procure services.
Supplier	The organization providing services to the requestor.
Supplier Account Manager	The primary contact at the supplier organization who will receive the SAP Fieldglass initial registration email.
SOW Owner	Buyer representative who requires the services or project.
SOW Creator	The Buyer representative who created the SOW; may also be the SOW Owner or may have created the SOW on behalf of the SOW Owner.
Work Order	An electronic document created in SAP Fieldglass application that outlines the terms, dates, rates selected for the SOW Worker.
Work Items	Items in SAP Fieldglass that require action, such as responding to a SOW Bids, accepting SOWs, or approving SOW Line Items.
Characteristics	Items that define the components of the SOW.
Event	Specific milestones or delivery of work products that can be pre-defined with dates of completion.
Fee	Payments to be made for units delivered at an agreed upon rate.
Clauses	These contain legal terms for standard regulatory governance policies as well as the contractual language or agreement between the buyer and supplier.
SOW Worker	Workers associated to the SOW.

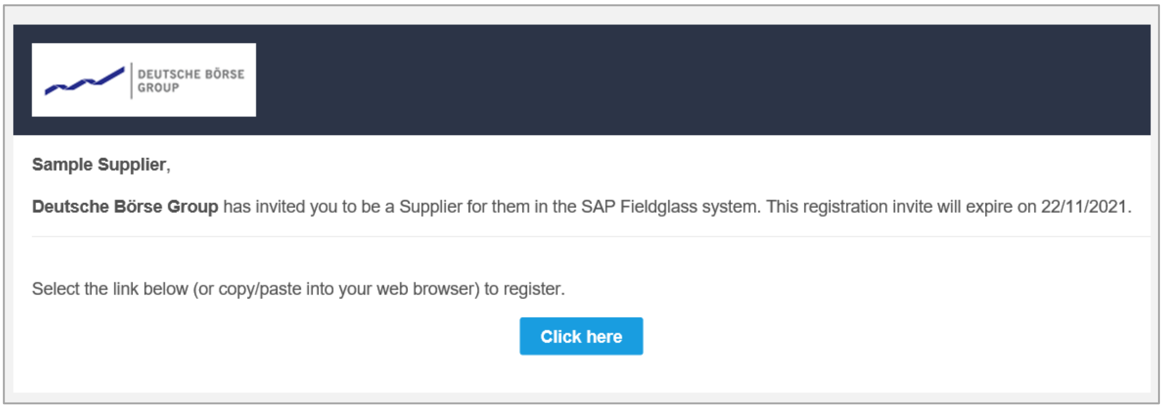
4. Supplier Roles and Responsibilities

Suppliers are ultimately responsible for providing services and temporary workers to a buyer. As Fieldglass aims to streamline the various vendor management processes, suppliers must manage service processes, from submission of bids for agreed upon deliverables and services to management of SOW Workers.

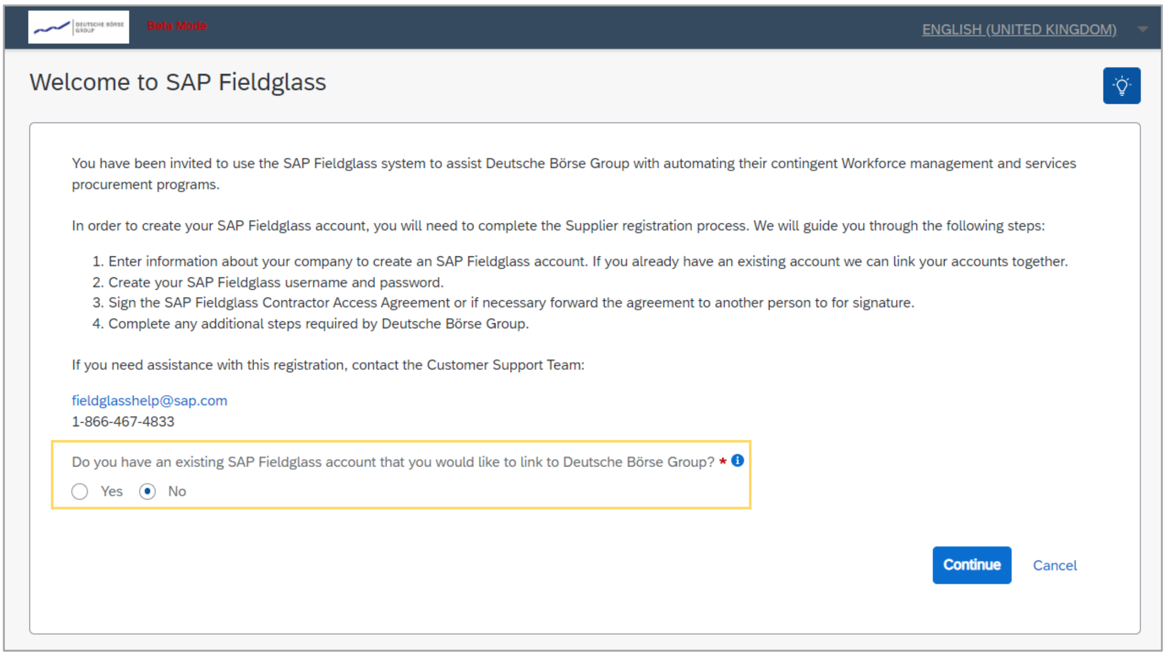
5. Supplier Registration

Before logging into the SAP Fieldglass application, you must register your user account. You will be receiving a Supplier Invitation email when the Deutsche Börse System Administrator creates your account. The email will contain a link to the SAP Fieldglass registration page.

1. Click the **Click here** link in the email to open the registration page.

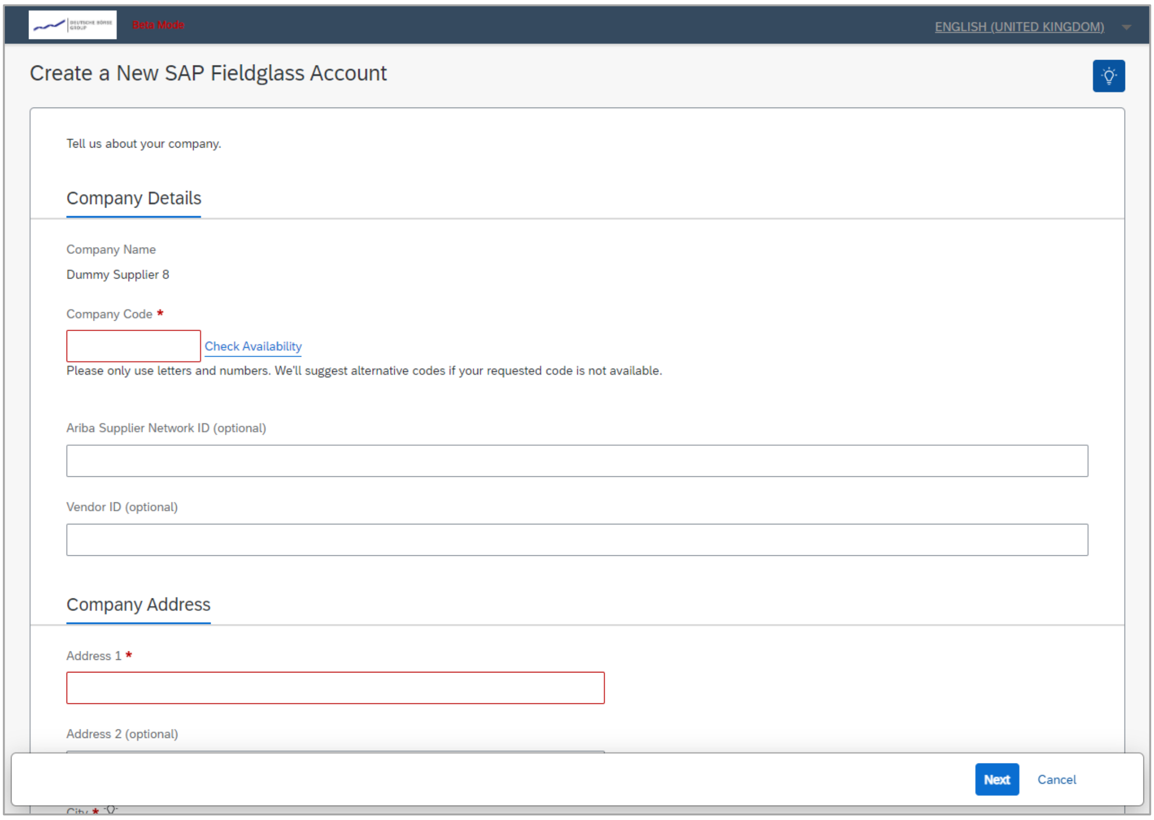


2. If you are a new Supplier to Deutsche Börse, but already have an existing supplier administrator account, you have the option to link your new account to your existing account.

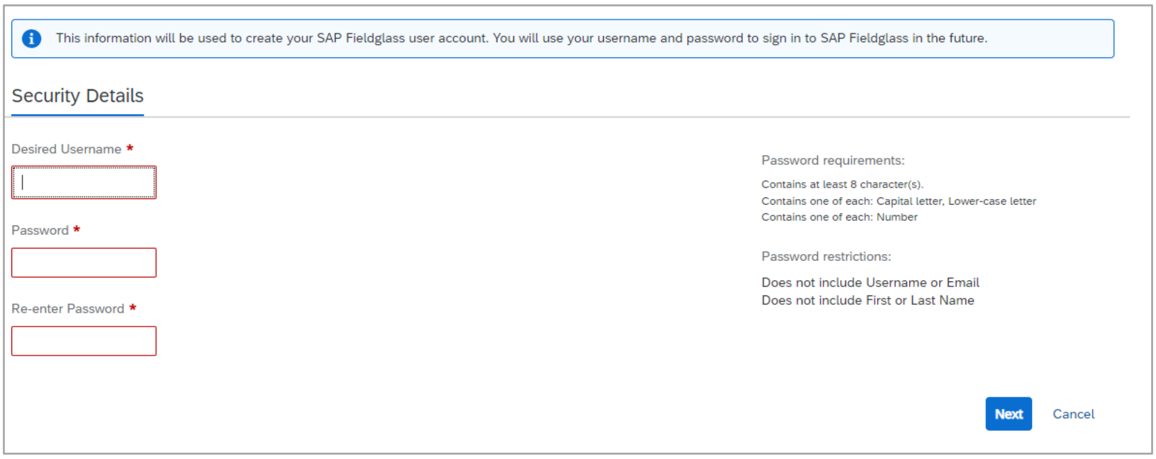


3. If this will be a new SAP Fieldglass account, you will be directed to the Create a New SAP Fieldglass Account page where you will be required to complete details about your company. Please ensure to complete all the required fields which are indicated with an asterisk (*), as well as the **Ariba Supplier Network ID** field. Ariba Supplier Network ID has the format of ANxxxxxxxxxx (11 digits). Should you need assistance in updating this field, or details of your Ariba Supplier Network ID, please contact DBAG's Purchasing.

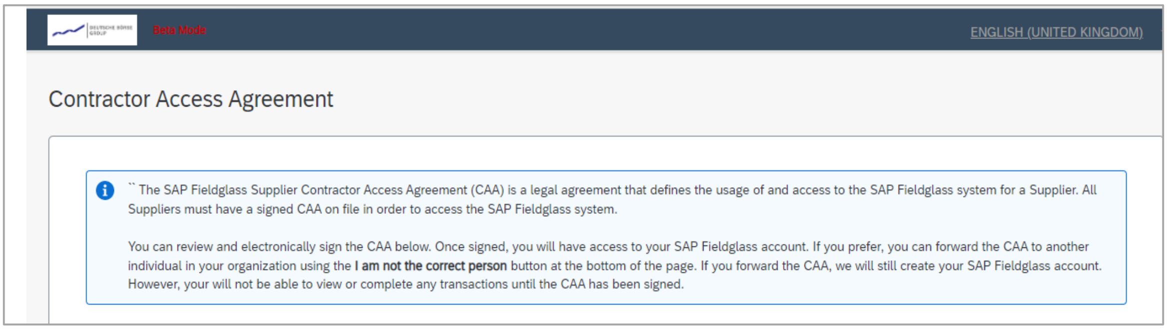
   For the Company Code, please enter a four-character code comprised of a combination of letters and numbers. Should the code entered be unavailable, you may select from the suggestions provided by SAP Fieldglass.



You will also be required to create a username and password.



4. Upon completion of the required fields, you will be directed to the Contractor Access Agreement (CAA) page, wherein you are to signify agreement to the use and access of the SAP Fieldglass system for Suppliers. This will be electronically signed by you, or if you are not the correct person, this can be forwarded to the necessary.



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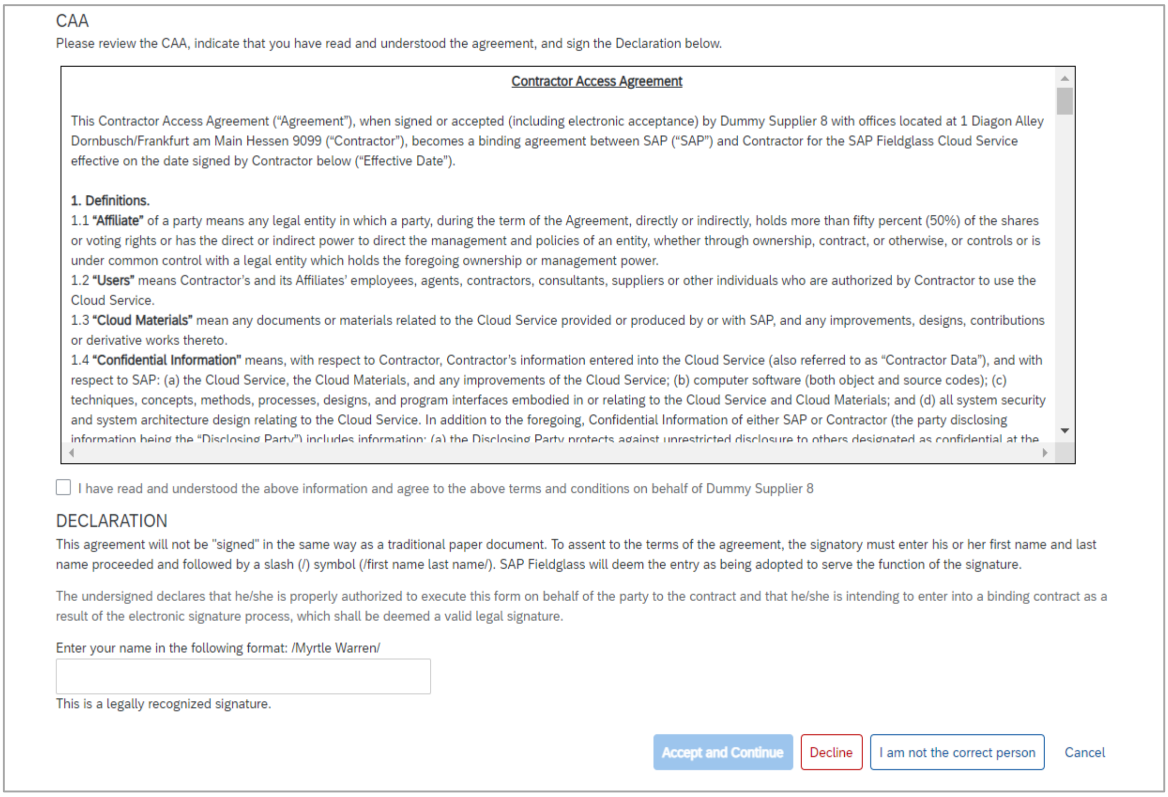
Contractor Access Agreement

The SAP Fieldglass Supplier Contractor Access Agreement (CAA) is a legal agreement that defines the usage of and access to the SAP Fieldglass system for a Supplier. All Suppliers must have a signed CAA on file in order to access the SAP Fieldglass system.

You can review and electronically sign the CAA below. Once signed, you will have access to your SAP Fieldglass account. If you prefer, you can forward the CAA to another individual in your organization using the **I am not the correct person** button at the bottom of the page. If you forward the CAA, we will still create your SAP Fieldglass account. However, your will not be able to view or complete any transactions until the CAA has been signed.



CAA

Please review the CAA, indicate that you have read and understood the agreement, and sign the Declaration below.

Contractor Access Agreement

This Contractor Access Agreement ("Agreement"), when signed or accepted (including electronic acceptance) by Dummy Supplier 8 with offices located at 1 Diagon Alley Dornbusch/Frankfurt am Main Hessen 9099 ("Contractor"), becomes a binding agreement between SAP ("SAP") and Contractor for the SAP Fieldglass Cloud Service effective on the date signed by Contractor below ("Effective Date").

1. Definitions.
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 Cloud Service.
1.3 **"Cloud Materials"** mean any documents or materials related to the Cloud Service provided or produced by or with SAP, and any improvements, designs, contributions or derivative works thereto.
1.4 **"Confidential Information"** means, with respect to Contractor, Contractor's information entered into the Cloud Service (also referred to as "Contractor Data"), and with respect to SAP: (a) the Cloud Service, the Cloud Materials, and any improvements of the Cloud Service; (b) computer software (both object and source codes); (c) techniques, concepts, methods, processes, designs, and program interfaces embodied in or relating to the Cloud Service and Cloud Materials; and (d) all system security and system architecture design relating to the Cloud Service. In addition to the foregoing, Confidential Information of either SAP 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

I have read and understood the above information and agree to the above terms and conditions on behalf of Dummy Supplier 8

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: /Myrtle Warren/

This is a legally recognized signature.

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

5. Once signed and accepted, you will be able to log in to Fieldglass.

6. Signing into SAP Fieldglass

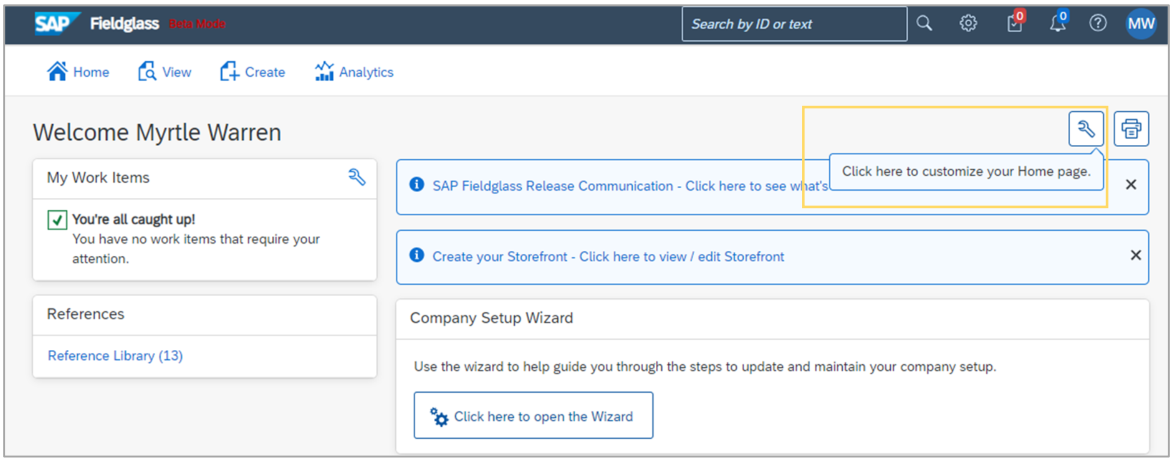
After the successful registration, you can now log into Fieldglass to view and respond to the different Work Items.

1. Navigate to https://www.fieldglass.eu from the internet browser.
2. Enter the username and password.
3. Click **Sign In**.

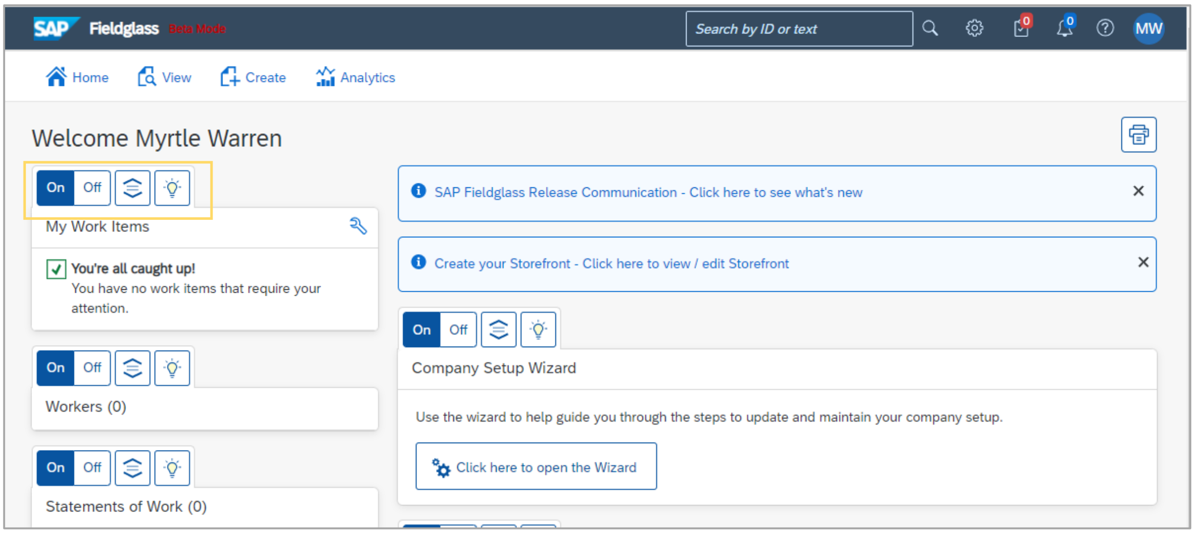
7. Customize the SAP Fieldglass Home Page

You can select the information that you would like to view on your SAP Fieldglass Home page.

1. On your Home page, click the **Customize** link on 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 want to reorganize the Home page by selecting **Move** option to drag and drop a section to another position vertically on the page.

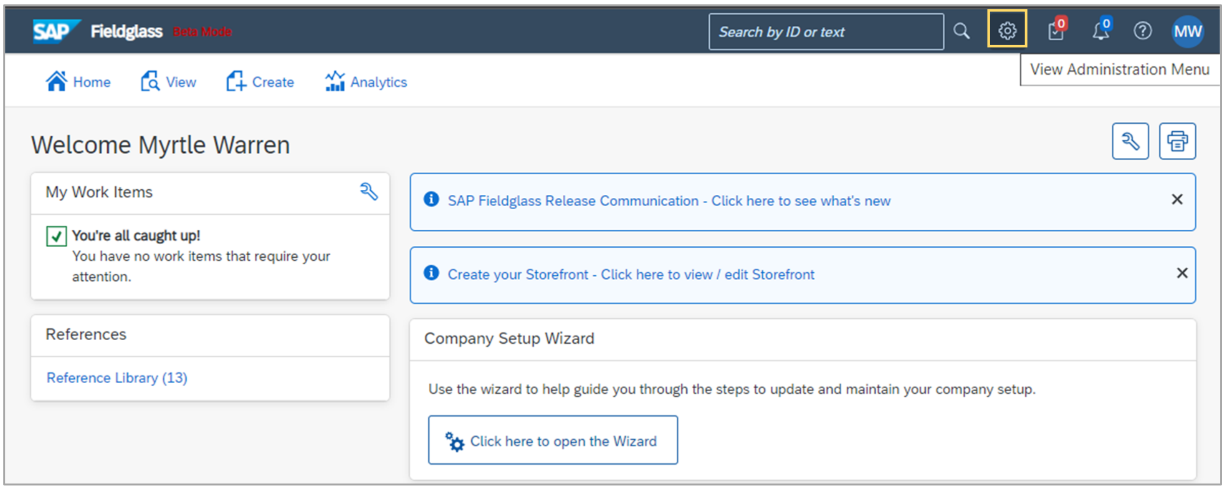


4. Once complete, click on **Done** to save changes and return to the Home page.

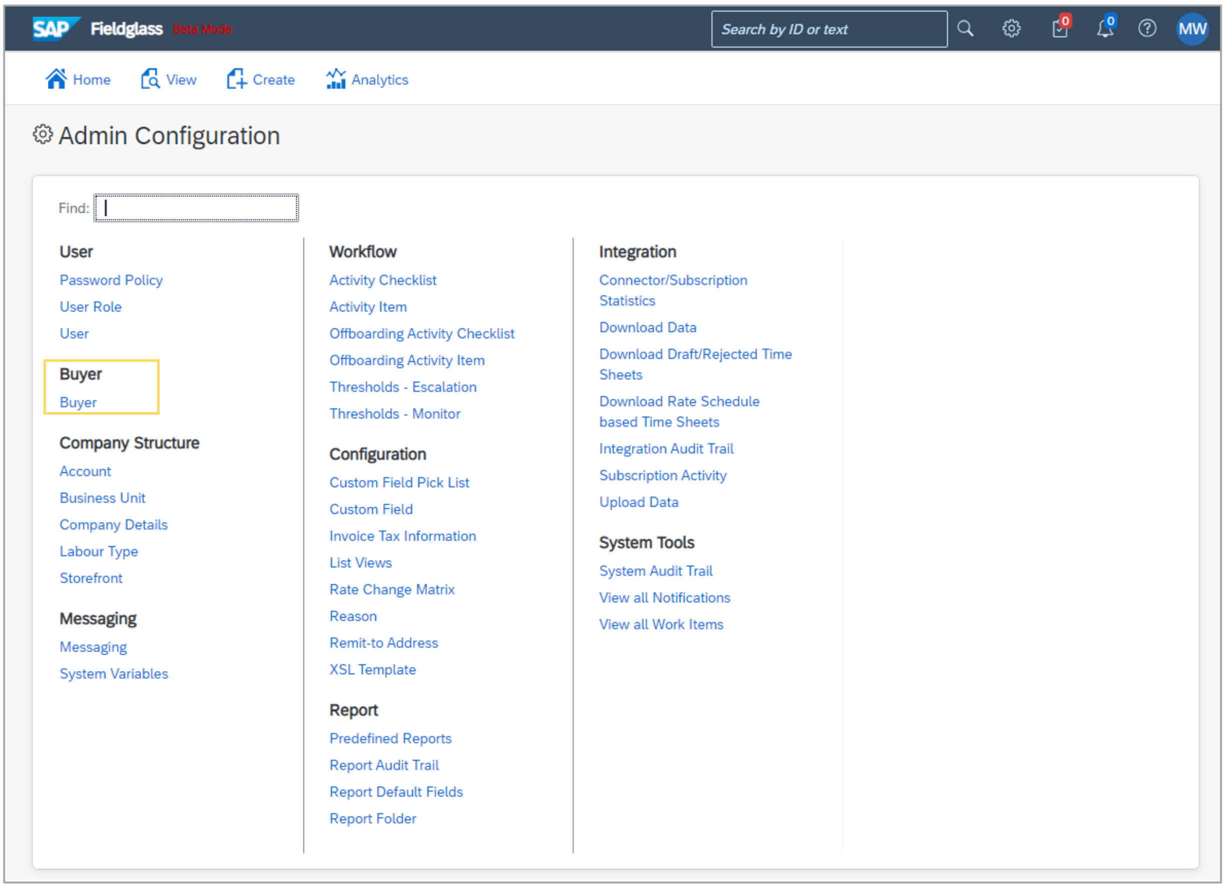
8. Updating Supplier Information

Now that your Supplier account has been set up, you need to update the Buyer details with Deutsche Börse.

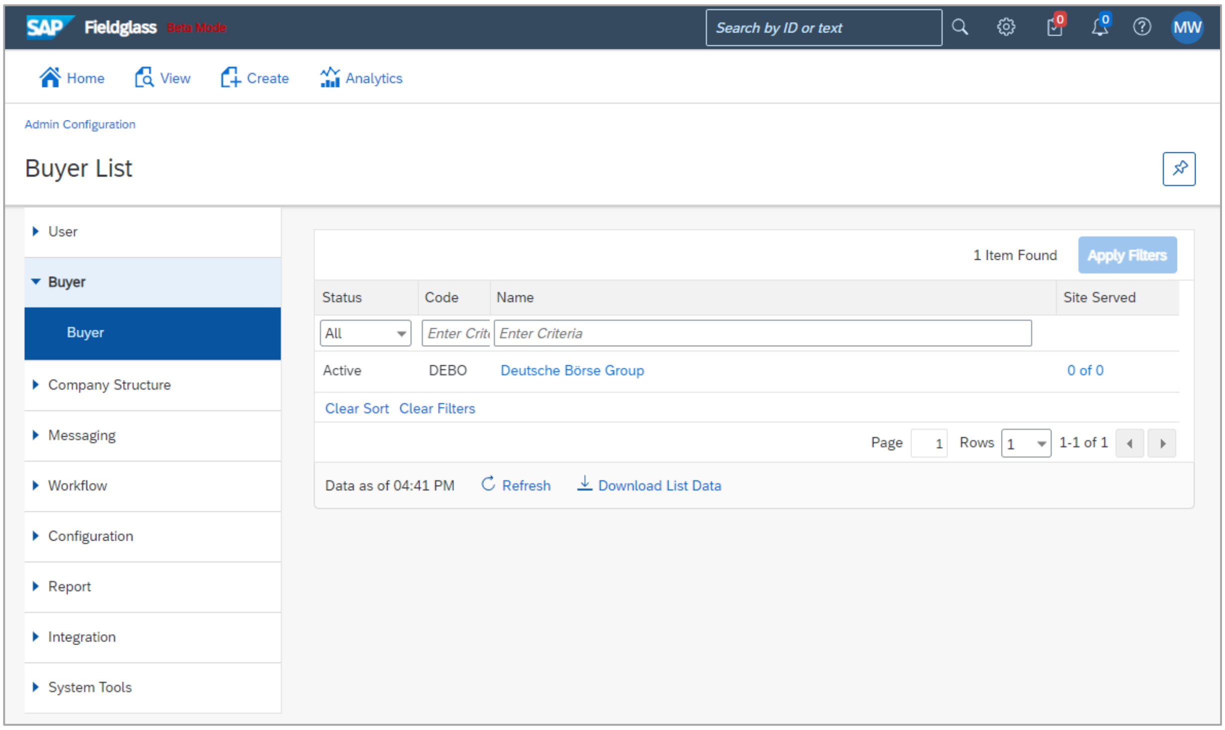
1. In the Home page, navigate to the Administration Menu above the navigation bar.



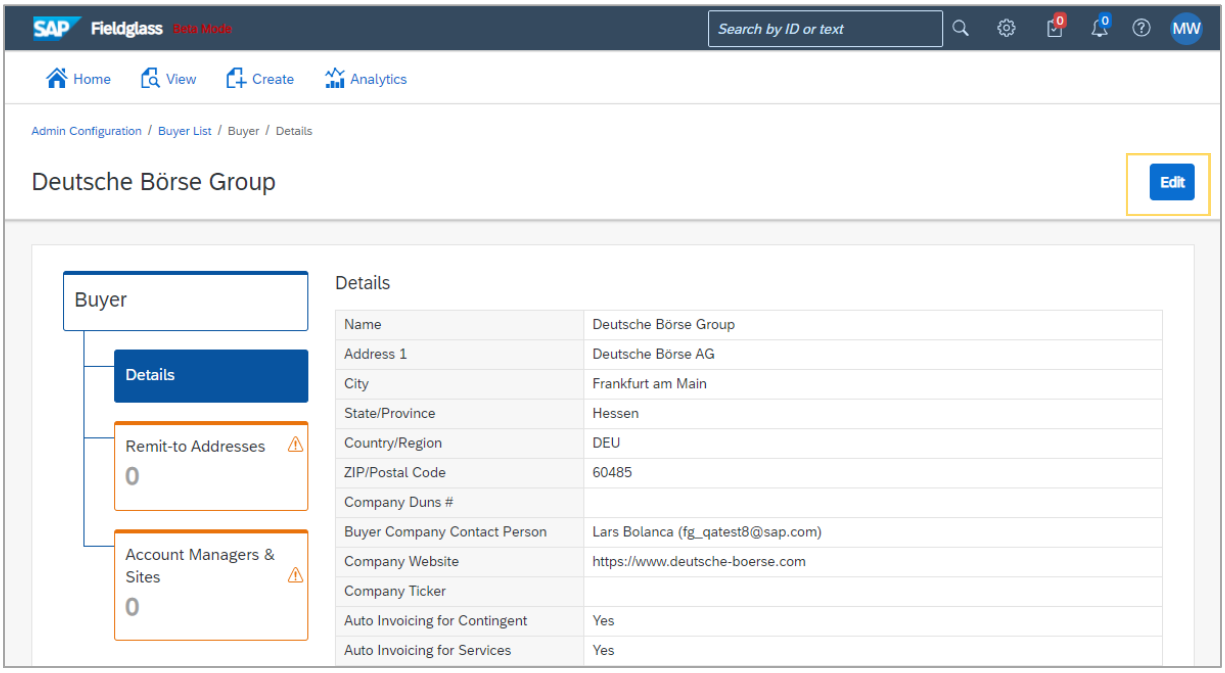
2. It will take you to the Admin Configuration menu. In the Admin Configuration menu, click on **Buyer**.



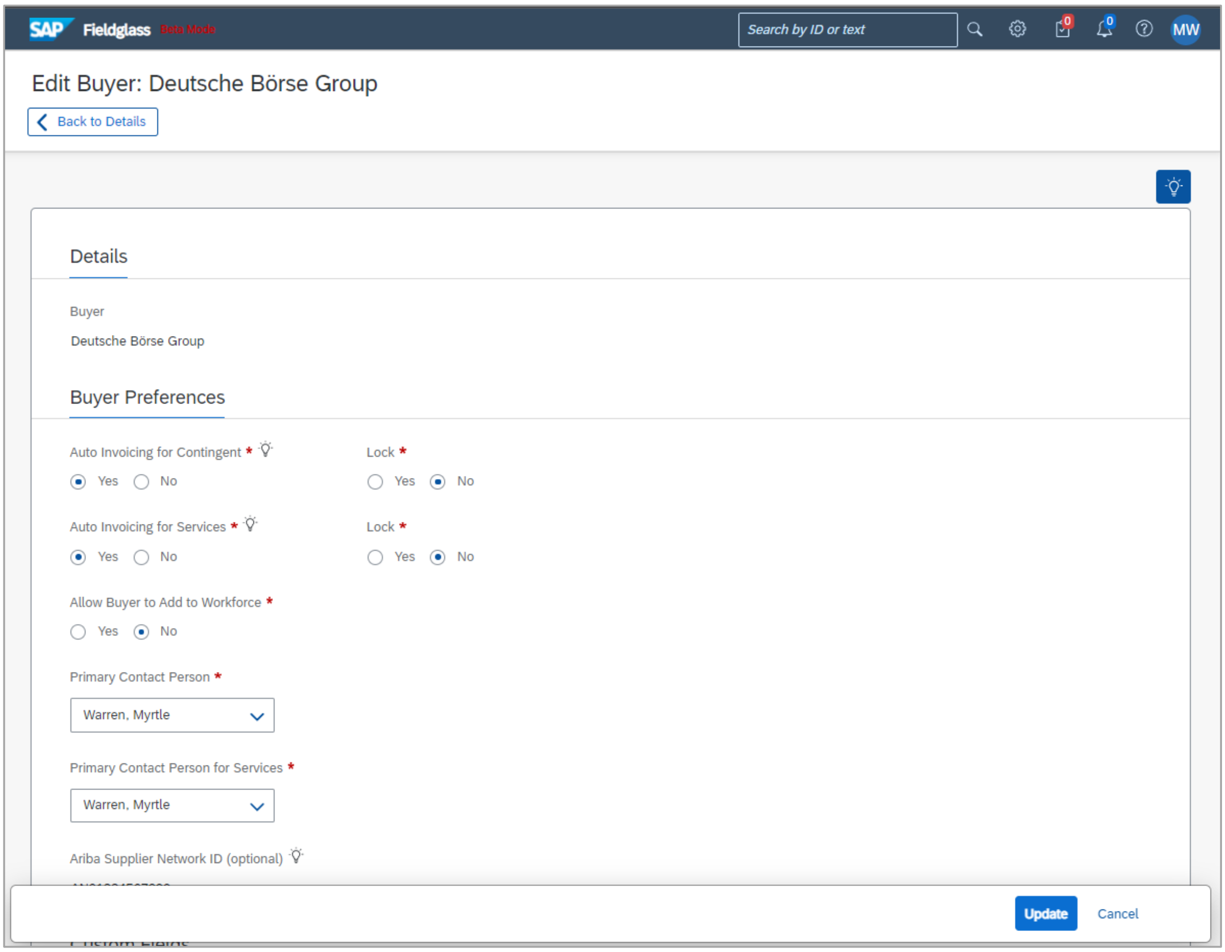
3. Click on **Deutsche Börse Group**.



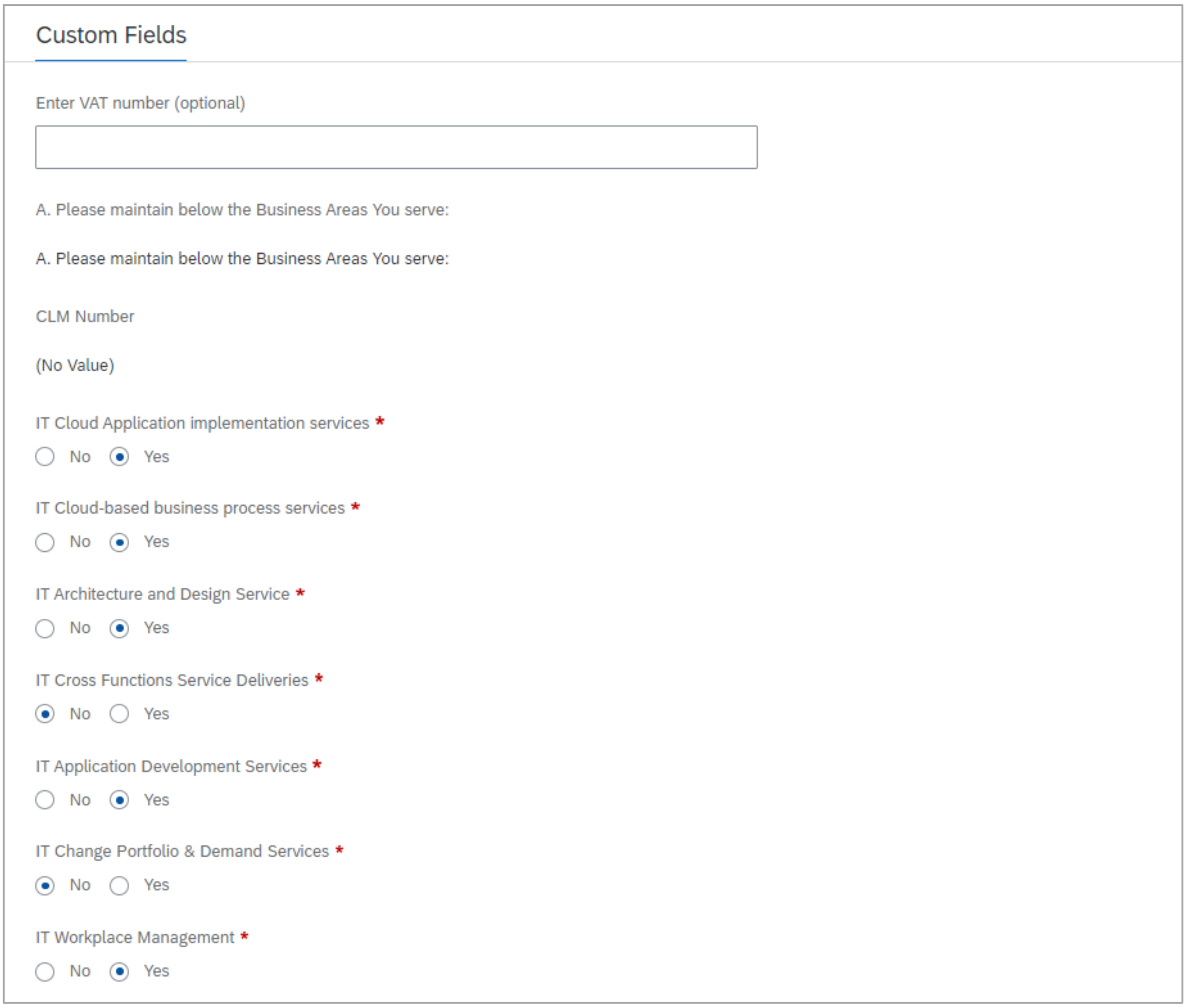
4. In the Buyer details, click on **Edit**.



5. You will be required to update the fields on the Supplier profile.



6. Scroll down to the Custom Fields section and enter the details as applicable. For example, VAT number, business areas you serve and so on.



Custom Fields

Enter VAT number (optional)

A. Please maintain below the Business Areas You serve:

A. Please maintain below the Business Areas You serve:

CLM Number

(No Value)

IT Cloud Application implementation services *

○ No ◉ Yes

IT Cloud-based business process services *

○ No ◉ Yes

IT Architecture and Design Service *

○ No ◉ Yes

IT Cross Functions Service Deliveries *

◉ No ○ Yes

IT Application Development Services *

○ No ◉ Yes

IT Change Portfolio & Demand Services *

◉ No ○ Yes

IT Workplace Management *

○ No ◉ Yes

IT Infrastructure Management *

(•) No ( ) Yes

IT Application Management and System Integration Design Services *

(•) No ( ) Yes

IT Risk, Compliance and Security Services *

(•) No ( ) Yes

Temp Labor personnel services *

(•) No ( ) Yes

Onsite Training Services *

(•) No ( ) Yes

Online Portal Trainings *

(•) No ( ) Yes

Strategic Management Consulting *

(•) No ( ) Yes

Business and Corporate Management consultation services *

( ) No (•) Yes

Project Management & Consulting *

( ) No (•) Yes

Legal Consulting Services *

(•) No ( ) Yes

Human resources consulting service *

(•) No ( ) Yes

Audit services *

( ) No (•) Yes

7. Please select the geographies or countries for which you provide the services.

B. For which countries can you provide professional services ?

Select from below options

Germany *

◯ No ◯ Yes

Luxembourg *

◯ No ◯ Yes

United Kingdom *

◯ No ◯ Yes

Czech Republic *

◯ No ◯ Yes

Ireland *

◯ No ◯ Yes

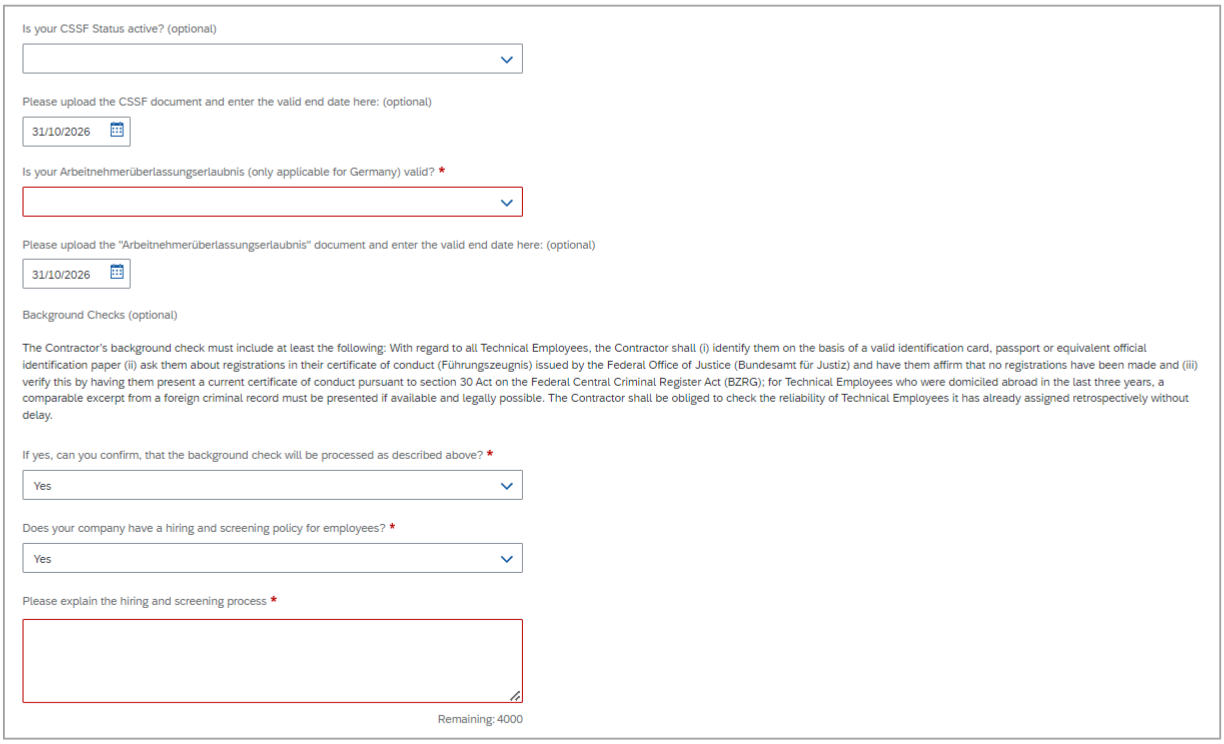
Switzerland *

◯ No ◯ Yes

Singapore *

◯ No ◯ Yes

8. Other details with respect to CSSF, background check and update.



9. Once you have completed all the required fields, you can click on **Update** to save your details.

9. Adding Additional Supplier Users

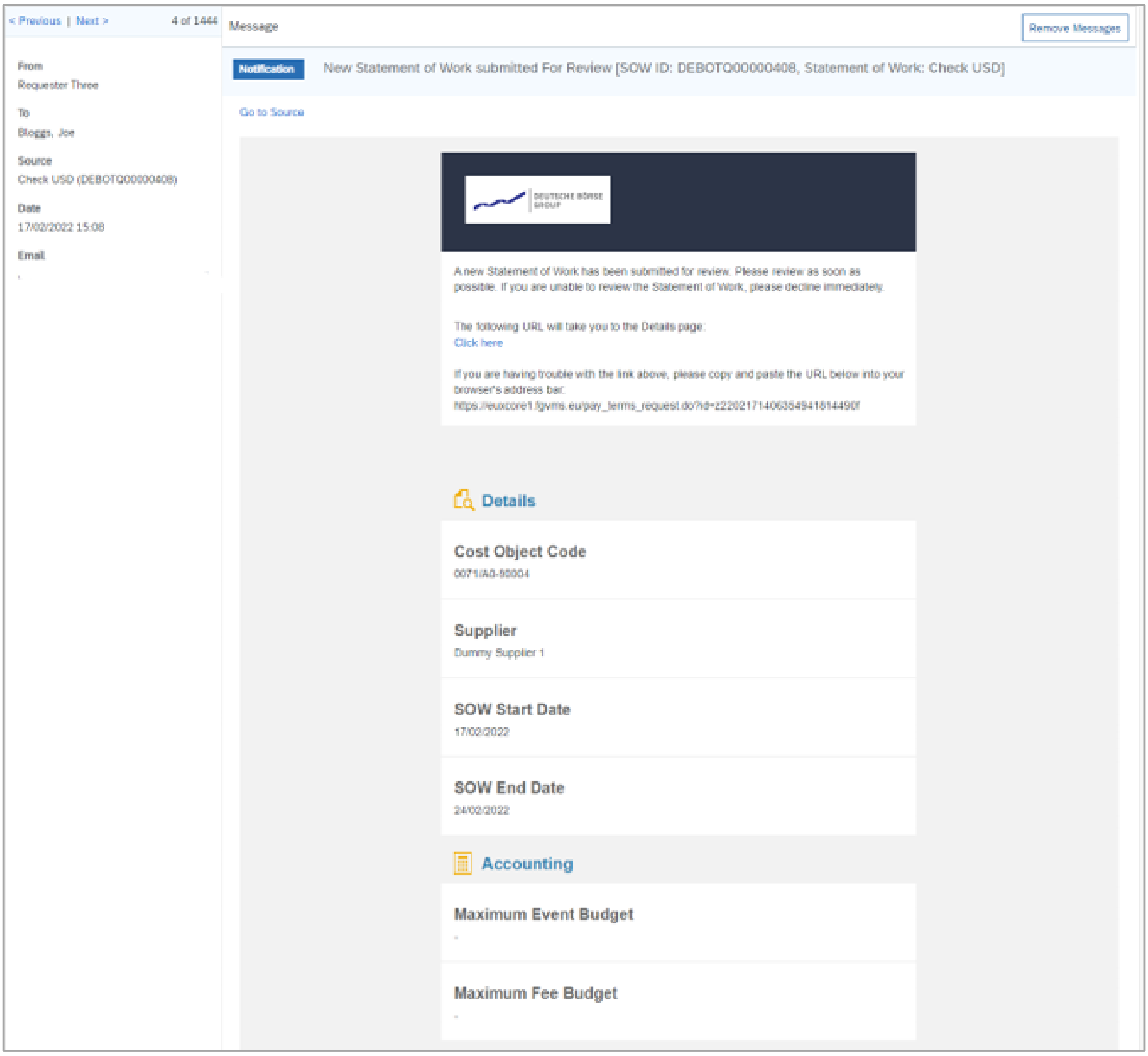
One of the responsibilities of Supplier Account Managers is to add additional supplier users. The supplier account manager can set the role, supervisor, and account assigned to the new users. Roles are used to define the access and permissions a certain has in Fieldglass.

1. On the Fieldglass homepage, click on the **Admin Configuration** icon on the upper right corner.
2. Under the User section, click **User.** You will be directed to the User List.
3. Click **New.**
4. Fill out the **required fields.** You will be able to update the information after account creation.
5. Once required fields are filled, click **Add.**

10. Supplier Activities in Fieldglass

10.1. Receiving your Work Items in Fieldglass

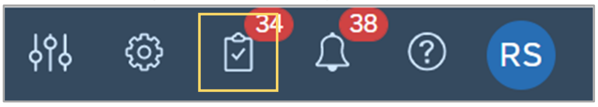
When the Buyer sends their SOW Bids or SOWs or any item for your action, you will be receiving these notifications through email or you may also see these in the Message Center in Fieldglass. The email notice will usually include high level description of the SOW or SOW Bid and a link for you to directly access.



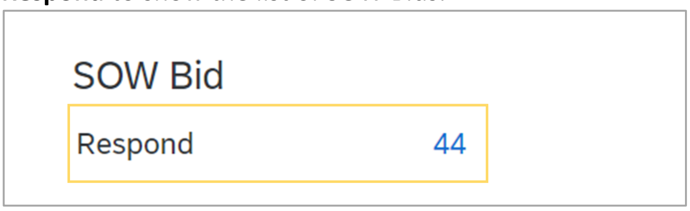
10.2. Responding to a Statement of Work Bid

For any item requiring action, these can be accessed in your Work Items menu.

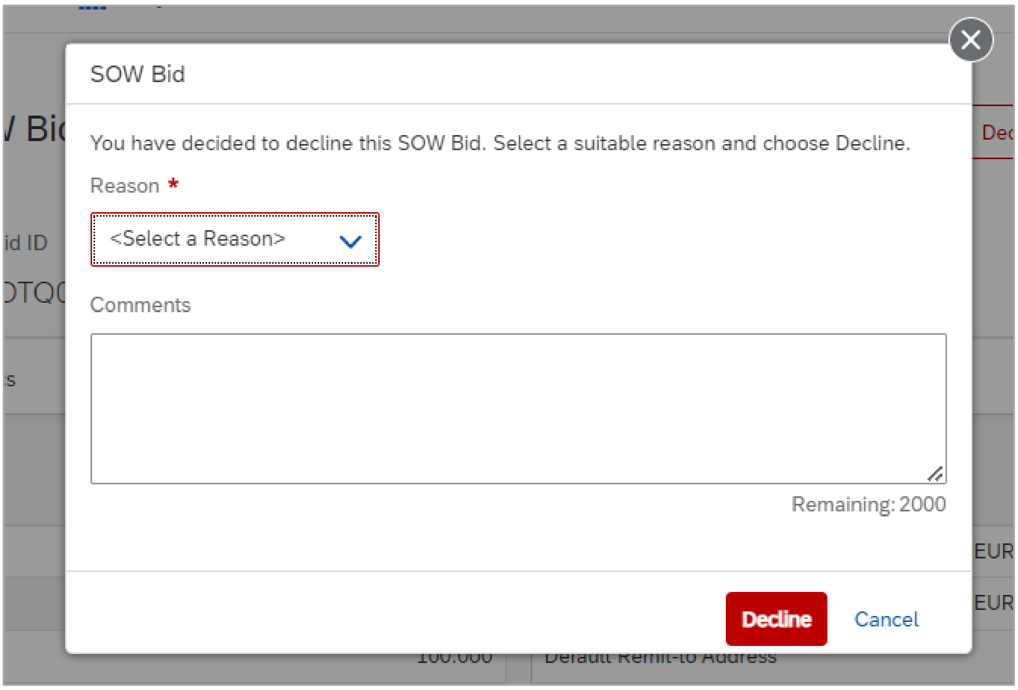
1. On the Fieldglass Home Page, click the **Work Items** icon on the upper right corner.



2. A list of the items that need action will be displayed and for the SOW Bid, click on **Respond** to show the list of SOW Bids.



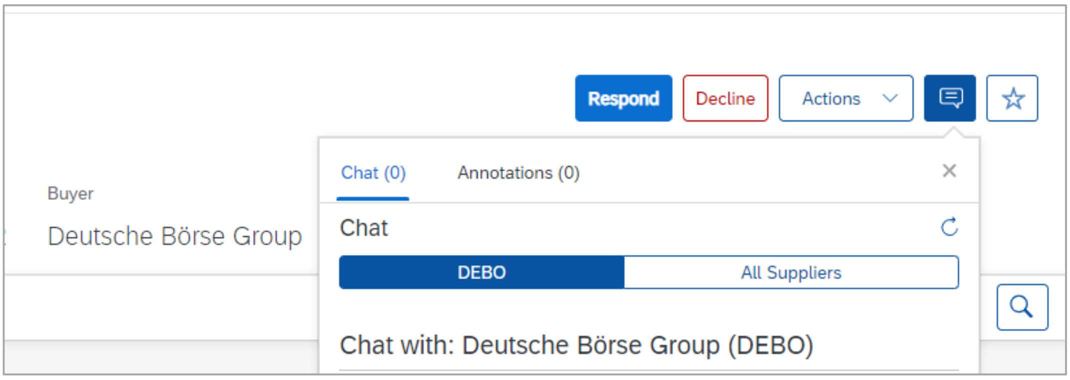
3. Click on the ID of the SOW Bid. You should be able to either **Respond** or **Decline** to the SOW Bid.
    a. When selecting Respond, you will be directed to the Create SOW Bid Response page where in you will be required to input details of your offer.
        - Please ensure to indicate a value in the Maximum Budget field before entering other details.
        - Attachments can be uploaded in the Details page of the SOW Bid.
        - While creating the SOW Bid Response, you may save this as a draft by selecting **Complete Later**. SOW Bid will be saved with the initial information of the offer, and you may return to it by selecting **Edit**.
        - You may update or add Events and Fees in the Characteristics section of the SOW Bid. If there are no Events or Fees defined by the Buyer, select **Add New Event** or **Add New Fee** and enter the milestones and charges you are planning to provide.
    b. Clicking on Decline will generate a pop-up window and will require you to select a reason for declining the SOW Bid.



Status of the SOW Bid will change to Declined, however, you may also reopen the SOW Bid by clicking on **Actions** then **Undecline**. You will then be able to **Edit** the SOW Bid.

10.1.1. Using the Chat

Suppliers may have questions pertaining to the SOW Bid and can course their questions through the Chat in the SOW Bid. It is recommended not to send any personal information in this channel, as different users will be able to access the SOW Bid and Chat. For sensitive or confidential questions for DBAG or not related to the SOW Bid, please contact DBAG through your usual channels.



Suppliers may send their queries for the Q&A session through here until a specified date provided in the SOW Bid. Expect the response from the Buyer to be consolidated with all the different questions to be uploaded to the SOW Bid for reference and can be found in the Details page.

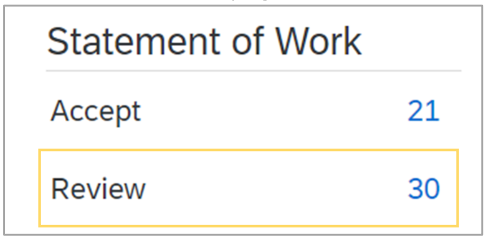
10.1.2. SOW Bid Results

You should be able to check the results of the SOW Bid in Fieldglass. Whenever the Buyer will have a response to the SOW Bid, you will be notified through the Message Center, which can be found on the Menu bar of the Fieldglass home page, or via email. You should be able to see the reply of the Buyer, and it is encouraged to check the comments.

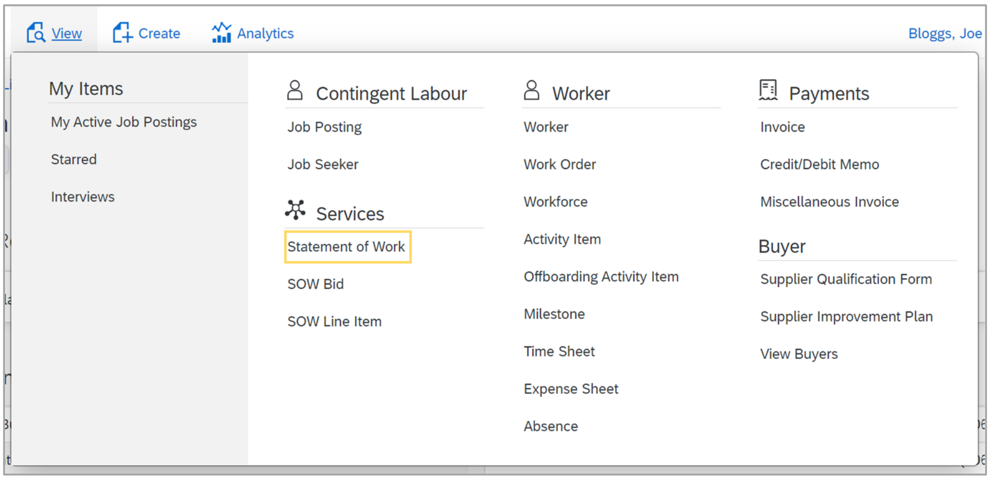
10.3. Responding to a Statement of Work

When the SOW's terms are Supplier-defined or Buyer and Supplier-defined, you can negotiate the terms of the SOW with the Buyer prior to finalizing.

1. On the Fieldglass homepage, click on the **Work Items** icon on the upper right corner.
2. Under the **Statement of Work Section**, click on **Review**. You will be directed to the Statement of Work page.



- This can also be accessed from the home page by going to **View** and selecting **Statement of Work**. Here, all the SOWs you are working on, from the SOW Bid and so forth, are all available.



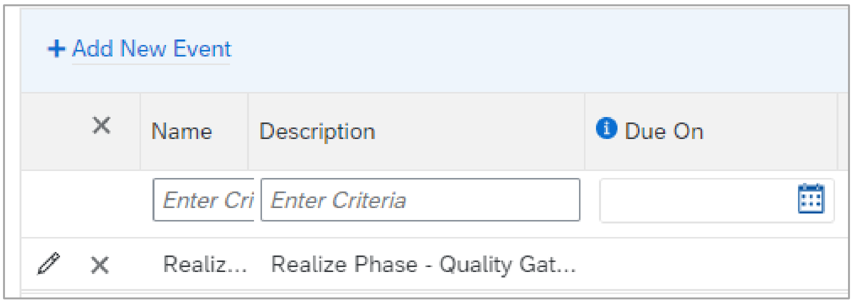
3. From the list of SOWs, click on the **ID** of the SOW you wish to review. You should be able to review all the relevant information before you respond.

The table below shows the name and description of the tabs in the SOW page.

Statement of Work Tabs	
SOW Tab Name	**Description**
Details	This tab contains detailed information about the SOW such as PO Number, SOW Owner, Cost Objects, etc.
Activity Items	This displays activity items. For SOWs, no action is required from the Supplier.
Clauses	The Clauses tab indicates the legal and contractual information of the SOW.
Characteristics	This tab contains information about events and fees.
SOW Workers	This tab displays the list of workers defined as SOW Workers, including rules, rates, and roles.
Related	This tab displays all the documents related to the SOW (e.g. Time and Expense Sheets).

4. During the review of the SOW, as a Supplier, you may be able to do the following:
   a. Manage the Characteristics – You can either edit (by clicking on the pencil) or remove (by clicking on the X) the line item.

      To add: Click on **Add New Event** or **Add New Fee.** The **Add New Event/Fee** pane will show on the right side of the page. Add at least the **Name** and the **Amount** of the event, and add the **Name**, **Rate** and **Unit** of the fee. For Fees, please ensure to complete the **Maximum Units** field as well.



b. Manage the SOW Workers – if there are SOW Workers defined in the SOW, you may add the SOW Workers at this stage. Click on **Add SOW Worker** or **Submit an Existing Workforce** to add. You will need to choose the roles for the SOW Worker and complete the required fields, including the rate.

5. The last page is the Review page, where in the summary of the SOW details is enumerated. Click on **Submit** once final for Buyer review and approval. If you need to make changes, click **Back**. Click **Cancel** if you need to delete the changes made, or **Complete Later** to save the SOW Response as a draft and return to it later.

10.4. Accepting a Statement of Work

Once all the details have been finalized and this has been fully approved by the Buyer, you may now accept the SOW. If the SOW is defined by the Buyer, you will not be able to negotiate the terms of the SOW and will only be able to accept or decline.

1. On the Fieldglass Homepage, click on the **Work Items** icon on the upper right corner.
2. Under the **Statement of Work Section**, click on **Accept**. You will be directed to the Statement of Work page.
3. From the list of SOWs, click on the **ID** you wish to accept.
4. Click **Accept.** You will be going through the details of the SOW and be able to update the Primary Contact Person and add Attachments, if necessary.
5. Click **Continue**.
6. Click **Submit** to send the accepted SOW to the buyer.

10.5. Declining a Statement of Work

You can also decline an SOW.

1. Click on the **Work Items** icon.
2. Under the **Statement of Work Section**, click on **Accept**. You will be directed to the Statement of Work page.
3. From the list of SOWs, click on the **ID** you wish to respond to.
4. Click **Decline.**
5. A dialog box will appear. Select a **reason** and add comments, if any.
6. Click **Decline**. The buyer will be notified that you declined the SOW.

10.6. Creating a Fee

Fees are submitted when items are used and are consumption-based. In this case, Fees are set up to be charged either by Day, Activity Unit or Hour. As a Supplier, once the item is used, you may submit these through Fieldglass.

1. On the View menu, click **Statement of Work.**
2. Select the SOW by clicking on its ID.
3. In the SOW, click on Actions and select **Create Fee**.
4. Enter the required information about the fee:
    a. Select the **Effective Date** of the Fee.
    b. In the Fees section, click on **Add Fee** (you can also select **Add Multiple Fees** if there are different fees to be charged on a specific date) and select the name of the Fee to be charged. You may add a description, if needed.
    c. Enter the number of **Units**. The system will automatically calculate the units times the rate of the fee to get the Amount.
    d. You may **Add Attachments** as supporting documents, if any.
5. Click **Continue** and you will be directed to the Review and Submit page.
6. Once all details are reviewed and finalized, you may click on **Submit** for this to be sent to the Buyer for approval.

10.7. Submitting an Event

Events are milestones completed by the Supplier.

1. On the View menu, click **Statement of Work**.
2. Select the SOW by clicking on its **ID**.
3. In the SOW, go to the **Characteristics** tab for the Events.
4. Select the **Event** for completion and click on **Mark as Complete**.
5. Enter the required information for the Event:
    a. Enter the **Completed Date** of the Event.
    b. Under the Accounting section, confirm the **Final Terms** (amount) for the Event.
    c. You may **Add Attachments** as supporting documents, if any.
6. Click **Continue** and you will be directed to the Review and Submit page.
7. Once all details are reviewed and finalized, you may click on **Submit** for this to be sent to the Buyer for approval.

10.8. Submitting Rejected Line Items

There are instances wherein the Buyer will reject the submitted SOW Line Item for various reasons and you will need to resubmit this for approval.

1. In your Work Items, you select the Line Item (Fee, Event, Time or Expense Sheet) under **Resubmit Rejected**.
2. Select the **ID** of the rejected Line Item to retrieve the details.
3. Click on **Edit** to update the Line Item accordingly. Note that you will be able to see the reason for the rejection in the Comments of the Details tab.
4. Update the Line Item’s details and click on **Continue**.
5. On the Review and Submit page, confirm all the details are correct and click on **Submit** for approval of the Buyer.

10.9. Submitting SOW Worker Time Sheets

As a supplier, you can submit time sheet on behalf of the worker.

1. On the Fieldglass homepage, click on the **View** menu.
2. Select **Worker** under the **Worker** section.
3. From the list of Workers, click on the **ID** of the worker for whom you want to submit a time sheet.
4. You should be directed to the Summary tab of the Worker's page. Click on the **Time & Expense** tab. You should see the list of time sheets under that work.
5. Click on the **ID** of the time sheet you want to submit. You should be directed to the Details tab of the worker's time sheet.
6. Click **Edit.** You might be asked to select task codes to enter against the time sheet.
7. Complete the required fields.
8. Click **Submit**.

10.10. Submitting SOW Worker Expense Sheets

You may also submit the SOW Worker's Expense Sheets.

1. On the SOW Worker's Work Order, click on **Actions** to **Create Expense Sheet**.
2. You will be able to select the **Expense Code** for the type of expense.
3. Enter the **Date**, **Merchant**, **Description** and **Expense Amount**.
4. You may also **Add Attachments** for supporting documents, if any.
5. Click on **Submit** to send for Buyer approval.

11. Fieldglass Administration

11.1. Reference Library

The Reference Library is a source of documents the different Fieldglass users can access for help in Fieldglass processes or reference for their policies.

11.2. Profile and Preferences

The Profile page contains all the user's account information, which include username, email addresses, employee ID, role, feature access, primary business unit, primary supervisor, account, labor type, proxies, and delegates. Only an administrator user can edit the information found on this page.

The Preferences page contains all the information that refers to Locale, Home Page and Application Settings, and Messaging. The Locale includes the currency, time zone, date and time format, and language. The Messaging section contains the email format, system messages, and email messages. Only an administrator user can edit the information found on this page.

11.3. Updating User Account Information

Supplier Account Managers can update account information as needed, including primary business unit, primary supervisor, and account.

1. On the Fieldglass homepage, click on the **Admin Configuration** icon on the upper right corner.
2. Under the User section, click **User.** You will be directed to the User List.
3. Click on the **User Account** you wish to make changes to.
4. To update account information, click **Edit.**
5. Once information is update, click **Update.**

11.4. Resetting Password

Password can be reset by Supplier Account Managers through the Admin Configuration.

1. On the Fieldglass homepage, click on the **Admin Configuration** icon on the upper right corner.
2. Under the User section, click **User.** You will be directed to the User List.
3. Click on the **User Account** you wish to make changes to.
4. To update account information, click **Reset Password.**
5. A dialog box will appear. Click **Reset.** An email will be sent to the user's account to reset the password.

11.5. Message Center and Work Items

Messages are the different notifications Fieldglass users receive. Messages are used to alert approvers for items that need to be worked on and inform other relevant users on the current step of the Statement of Work, SOW Bid or Line Item. These messages can be sent to the Message Center, or directly to a user's email address.

The Work Items refer to the transactions which require action from the user in Fieldglass. The Work Items can be found on the upper right corner, on the menu bar of the Fieldglass home page.