



Fieldglass Supplier Process Manual Professional services

Overview and accessing Fieldglass



1 SAP FIELDGLASS SERVICES

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OVERVIEW

Fieldglass SOW, also known as SAP Fieldglass Statement of Work, is the SAP Fieldglass solution that focuses specifically on managing statements of work (SOW) for project-based work engagements.

The procurement of external services and SOW-based engagements represent a significant proportion of Nedbank's spend on its external workforce, and SAP Fieldglass is used to support the entire services procurement lifecycle to source, manage, engage and pay providers for the professional-services commodity.

Benefits

The process represented in this document was specifically designed for Nedbank's operations to create efficiencies and ensure a seamless experience.

Going forward, you (as the supplier) must first receive a bid from Nedbank in order to do business with us. The new process offers a lot more advantages, including making you more visible to all our business units. Over time, the process will also be rolled out to the Nedbank Africa Regions, giving you the opportunity to leverage this exposure.

Statement of work

A SOW is a formal document that outlines the specific tasks, deliverables, timelines and other essential details of a project or engagement, and acts a contract or an agreement between a client and a service provider like a contractor, consultant or vendor.

SOW end-to-end process

This diagram details the end-to-end SOW process.



Summary of SOW process

The SOW process starts with a bid, which is an opportunity for multiple suppliers to give us competitive quotes. We have procurement policies that dictate how many quotes we must receive before we can make a fair selection, and through Fieldglass, suppliers have equal opportunity to be considered.

In the diagram above the Fieldglass system is represented by the swimlanes in blue.

The bid

- The first step is when a SOW contract owner creates a SOW bid with minimal information. It will include dates, an estimated budget (for our internal use only you will not be able to see it) and enough details so that you can respond with a bid in an adequate way.
- The SOW bid is then sent to us for approval. If it is approved, the bid will go out to suppliers and the Central Desk (CD) will ensure that the bid is in the correct module, eg 'contingent' or 'SOW'.
- If the bid has been approved and you received it, you will have the opportunity to market your services and must give us as much information as possible.
- With Fieldglass you can add information like your financial details, milestones and fixed schedules. If there is 'time' or 'material', you can include those details as well.
- Once you have completed this step, you must return your bid to the contract owner or project manager at Nedbank, who, in collaboration with Procurement, will assess and review your bid.
- They may need more information from you. If they do, they will return the bid to you with a request for more info.
- If your bid is unsuccessful, it will be rejected.

To ensure that the contract is accurate before finalisation, the bid can be a 'back and forth' process between you and us, and it is imperative that you check all the information to ensure that is correct. The bid process goes via the CD, who plays an important role in the approval process, ensuring that PIMS are processed for all workers. The CD will also generate a one-pager for Legal (LRL) and send it to all approvers for final approval of the contract.

Legal

- If your bid is successful and accepted, it will be approved and converted into a contract. That is why it is so important to ensure that the information captured in Fieldglass is correct. **The contract will be legally binding**.
- During this process the transaction document (TD) is also created and attached, which is used to create the purchase order (PO) at the end of the process.
- The TD will keep you within the boundaries of the PO value or budget of the contract.
- Other important information contained in the contract will include the roles of workers recoursed to us.
 - A big difference between a SOW contract and a 'contingent' contract is that a SOW contract contains only the roles of workers not their names. For example, when an engineering lead must be supplied to us at a maximum of R1 000 per hour if they are managed according to 'time' and 'material'.
 - Because this factor is not always evident upfront, you can always add workers to the SOW contract at a later stage.
 - Depending on the project, the requirements of these roles may change, and the system enables you to modify these details within the approved contract parameters.
- If the contract is approved, it goes to Ariba where the PO is created, and you will have access to it in Ariba.
- The contract is then sent to you via Fieldglass to be signed and accepted. The CD will send you the TD for signature using the Docusign functionality. During this process, the CD is your first point of contact for support.
- At this stage you can workers to the contract, but they will still need approval. If the workers are added and approved, they will receive access to our domain.
- If more workers are added at a later stage, PIMS must first be done for them.

Important

Every new worker has to sign a Nedbank non-disclosure agreement (NDA) and, if they are managed in terms of time sheets, they will need to register in Fieldglass. Workers, depending on their role, may require CC numbers if they need access to our domain or buildings, and Nedbank Human Resources will create and allocate these numbers to them.

The process above applies only to workers who require time sheets. However, not all workers require time sheet management, as not all contracts are managed according to time and material. SOW has different contract options. It can be milestone-based payments or fixed-schedule payments, and can include time sheets.

ACCESSING THE FIELDGLASS SYSTEM

BETA MODE (038)		ENGLISH (UNITED STATES) 🔻
	SAP Fieldglass 🎊	
	Username* Password*	
	Need login assistance? Help Center Sign In	
	•	

To access SAP Fieldglass, complete the following compulsory fields:

Field name	Description
Username	Enter your username.
Password	Enter your SAP password.

You and your contractors will each have your own login details to access the Fieldglass system.

ick on 👘	n	to continue. You w	vill then see the follo	wing screen.	
Fieldglass Beta Mode Home View Create Ana	lytics	Search by	ID or text	۵	≇ ⊚ 🚰 û [©] ଡ 🛐
Welcome Supplier -	Name Test	- Surname			ع
My Work Items	a,	SAP Fieldglass Release Communication	ation - Click here to see what's new		×
E Summary	159	Create your Storefront - Click here t	to view / edit Storefront		×
😤 Job Posting	3				
Statement of Work	5	Company Setup Wizard			
SOW Response	1	Use the wizard to help guide you throu	igh the steps to update and maintain your co	mpany setup.	
SOW Revision	1	2 Click here to open the Wizard			
🐝 Schedule	106				
Hevent	14	My Active Job Postings			×
8 Worker Activity	6		Manage Job Postings in a Single Vie Increase your productivity and monitor cy	ew vole times across all of your Job Postings. Our new interf	ace simplifies the management of your Job Posting work
Workers (13)			items and makes critical information crys You can also access this dashboard from	tal clear! the "View" menu above.	
Statements of Work (37)			View My Dashboard		

You can then select the relevant sections for completion.

Field name	Description	
17 October 2023	SAP Fieldglass Services Supplier Manual	Page 5

My Work Items	Any actionable items will show in the My Work Items section.
Workers	This is the section where you complete the details of workers.

Alternative ways to view the Work Area

the t view Area	op right of your so the items in the N a.	creen Work	to	
~	-0- -0-	\$	999 1	
	Job Posting		-	
	Respond	3		
	Statement of Wo	ork		
	Review	5		
	SOW Bid			
	Respond	23		
	SOW Response			Description
	Edit	1		
	SOW Revision			
	Review	1		
	Schedule			
	Respond	106		
đ	Event		bbl	
	Mark as Complete	14		
	and the second second			
	Worker Activity			
Butt	on	-		

You can also click on view at the top of your to view the following **My Work Items**:

Welco My Items Contingent Labor Worker Payments My Word My Active Job Postings Job Posting Worker Invoice Image: Sund Posting Starred Job Seeker Work Order Credit/Debit Memo Image: Sund Posting Starred Job Seeker Work Order Credit/Debit Memo Image: Sund Posting Job Seeker Work Order Change Request Miscellaneous Invoice Image: Sund Posting Statement of Work Workforce Buyer State SOW Bid Offboarding Activity Item Supplier Qualification Form Solv SOW Line Item Offboarding Activity Item Supplier Improvement Plan Milestone Firme Sheet Expense Sheet Expense Sheet	ome Vie	Create Analytics			
My Worl My Active Job Postings Job Posting Worker Invoice Starred Job Seeker Work Order Credit/Debit Memo Interviews Services Work Order Change Request Miscellaneous Invoice Image: Statement of Work Statement of Work Buyer Statement of Work Sow Bid Sow Bid Offboarding Activity Item Sow Sov Sow Line Item Milestone Supplier Improvement Plan Milestone Time Sheet Expense Sheet Statement Sheet	Velco	My Items	Contingent Labor	Worker	Payments
Starred Job Seeker Work Order Credit/Debit Memo Interviews Miscellaneous Invoice Interviews Services Statement of Work Workforce Statement of Work Activity Item Statement of Work Sol Bid Sol Sol Sol Bid Sol Sol Sol Line Item Sol Sol Sol Sol Sol Line Item Sol	My Work	My Active Job Postings	Job Posting	Worker	Invoice
Interview Services Work order change request Missettaneous invoice Image: Solution of Work Supplier Qualification Form Supplier Qualification Form Image: Solution of Work Supplier Qualification Form Supplier Qualification Form Image: Solution of Work Solution Item Offboarding Activity Item Supplier Improvement Plan Image: Solution of Work Solution Item Milestone View Buyers Image: Solution of Work Expense Sheet Expense Sheet	🔳 Sun	Starred	Job Seeker	Work Order	Credit/Debit Memo
** SOV SOW Line Item Supplier Improvement Plan ** SOV SOW Line Item Milestone ** SOV Time Sheet ** Sch Expense Sheet	H Job		Services Statement of Work SOW Bid	Workforce Activity Item	Buyer Supplier Qualification Form
SOV Time Sheet Sch Expense Sheet Absence	🐕 sov		SOW Line Item	Milestone	Supplier Improvement Plan
Sch Expense Sheet Absence	😤 sov			Time Sheet	
Physelles	券 Schi			Expense Sheet	

Viewing a summary of various categories

nen you click on	View	you will see the	My Wor	k Items label, disp	playing the Items R	equiring Action pop-up box.
Fieldglass Beta Mode		5	earch by ID or text		Q	🔹 🕸 🚰 Ç <mark>0</mark> 🖉 🗿 🛐
ome View Create Anal	ytics					
Velcome Supplier - I	Name Tes	st - Surname				e,
My Work Items	æ	SAP Fieldglass Release C	ommunication - Clic	ck here to see what's new		×
Summary	159	Items Requiring Action		lit Storefront		×
Bob Posting	3	Job Posting - Respond Statement of Work - Review	3	in Storenom		
Statement of Work	5	SOW Bid - Respond	23 -	(
SOW Response	1	SOW Revision - Review	1	is to update and maintain your company	iy setup.	
SOW Revision	1	Schedule - Respond Event - Mark as Complete	106 14			
Schedule	106	Worker Activity - Mark as Comple	te 6			
Event	14		View More Items			×
8 Worker Activity	6	Go to W	ork Item Manager	e Job Postings in a Single View e your productivity and monitor cycle tir	mes across all of your Job Postings. Our new	v interface simplifies the management of your Job Posting work
Workers (13)			You ca	and makes critical information crystal cle an also access this dashboard from the "\	earl View" menu above.	
Statements of Work (37)			View	v My Dashboard		

In the example above, the SOW Bid - Respond listed item was selected, displaying a list of bids:

ne View Create Analytics			
our Work Items All Work Items			
our Work Items SOW Bi	d		🗉
ived Within Action			
how All] Y Respond (23)	✓ Apply Fitters		23 Items Fo
			Doug 5 Y
			ROWS 5
Received ID Name		Buyer	Submitte
Received ID Name Enter Criteria Enter Criter	ia -	Buyer Enter Criteria	Submitte
Received ID Name Enter Criteria Enter Criteri 2023-08-05 NDBKTC90000496 raining BID	ia	Buyer Enter Criteria Nedbank Limited	Submitter 2023-08-0
Received ID Name Enter Criteria Enter Criteria Enter Criteria 2023-08-03 NDBKTCG00004930 Taining BID 2023-08-09 NDBKTCG00000411 SOW Bid 1	ia	Buyer Enter Criteria Nedbank Limited Nedbank Limited	Submitter 2023-08-0 2023-06-0
Received ID Name Enter Criteria Enter Criteria 2023-08-05 NDBKTC00000495 Taining BID 2023-08-09 NDBKTC00000415 SOW Bid 1 2023-07-14 NDBKTC00000475 End to End To	ia est Scenario GB 1407	Buyer Enter Criteria Nedbank Limited Nedbank Limited Nedbank Limited	2023-08-0 2023-06-2 2023-07-1
Received ID Name Enter Criteria Enter Criteria 2023-08-05 NDBKTC00000495 raining BID 2023-08-09 NDBKTC00000411 SOW Bid 1 2023-07-14 NDBKTC00000465 Ina 2nd require 2023-07-13 NDBKTC00000455 Ina 2nd require	ia est Scenario GB 1407 est	Buyer Enter Criteria Nedbank Limited Nedbank Limited Nedbank Limited Nedbank Limited	2023-08-0 2023-08-0 2023-07-1 2023-07-1
Received ID Name Enter Criteria Enter Criteria 2023-08-09 NDBKTC00000499 raining BID 2023-08-09 NDBKTC00000411 SOW Bid 1 2023-07-14 NDBKTC00000467 End to End T 2023-07-13 NDBKTC00000464 Ina 2nd requ 2023-07-12 NDBKTQ00000464 Ina 2nd requ	ia est Scenario GB 1407 est est	Buyer Enter Criteria Nedbank Limited Nedbank Limited Nedbank Limited Nedbank Limited Nedbank Limited	Submittee 2023-06-0 2023-06-2 2023-07-1 2023-07-1 2023-07-1

Click on the bid for which you would like to see the details.

Bid response tab

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Home View Create Analytics			
♂ SOW Bid List			
Training BID			Submit Edit Decline 🗉 🚖
B SOW Bid			
Status SOW Bid ID Period B	Buyer		
Draft NDBKTQ00000496 2023-08-01 to 2023-12-31	Nedbank Limited		
Rid Response Details Clauses Characteristics SOW Workers	Questions Related		h.
Accounting (ZAR)		SOW Bid Details	
No Accounting information available		Supplier Reference	
Posting Information			
Supplier Primary Contact Person Supplier Name and	i Sumame		
Characteristics			
Items			Final Amount (ZAR)
Totai			0.00

When the bid, or at a later stage, the contract is received, you must respond to it and confirm the details. At the top of the screen you will see the following, which gives you the estimated period of the contract:

Draft NDBKTQ00000496 2023-08-01 to 2023-12-31 Nedbank Limited

Initially the **Bid Response** tab details will be blank. However, when you click on **Details** you will see the information of the bid that you have received.

Details tab

Draft NDBKTQ00000496 2023-08-01 to	2023-12-31 Nedbank Limited				
Bid Response Details Clauses Characteristics	SOW Workers Questions Related				Q
Accounting (ZAR)			SOW Bid Details		
Cost Allocation		96	Buyer Reference		
TEST_DFL - RPA (CNGT10112)	10	000.000	Billable?	Yes	
Tota	10	000.000	Master SOW?	No	
Posting Information			Site	TEST_CONSTANTIA KLOOF ROODEPOO (4025382054)
Quiner	Gen HiringManager		Location	TEST_CONSTANTIA KLOOF ROODEPOO (4025382054)
Creater	Con HistorManager		Default Remit-to Address		
Greate Date	2022.09.00		Business Unit	Group Procurement (1000)	
Cultaria Data	2022-00-05		Description:		
Solutine Date	2022-00-09		Put in as much information as necessary for the supplier to be	able to quote you effectively.	
PO Number	2023-00-11		Defined By	Buyer and Supplier	
Time	SOW BIA		Characteristics	Schedules	
ppe Sovie big OW Coverinatore Team Central Deck		Events SOW Workers			
SOW Coordinators	SOW Coordinators Team, Central Desk		Evaluators	HiringManager, Gen (X-EG, HIRING, MANAGER)	
Billing Information				Busineder, active a contraction and active	
Buyer Information					

Field name	Description
Accounting (ZAR)	The details of the Nedbank internal cost centre against which the PO will be
	generated.
	Owner
	The details of the Nedbank project or contract owner with whom you should liaise
	if you have any questions. This is the person initiating the work and making the
	decisions in the Nedbank process.
	Creator
	Generally, the creator and the contract owner are the same person, but
	sometimes an administrator captures the detail on their behalf.
	Create Date and Submit date
	These dates tie back to when the bid was created.
Posting Information	SOW Bid Respond By Date
	This date is important – it is the date by which you need to respond.
	PO Number
	The purchase order number will be added later in the process.
	Туре
	Shows that this is a SOW bid.
	SOW Coordinators
	The CD is your point of contact. You can contact them in you need help at any
	stage during the process.
	High-level information about this bid, including the location, characteristics,
	evaluators etc.
SOW Bid Details	Description
	In the Description field, we will give you as much information as possible about
	the bid so that you can respond.

When you scroll down, you will see the following screen:

Training BID B SOW Bid			Submit Edit Decline 🖃 🚖
SOW Coordinators	Team, Central Desk		Events SOW Workers
Billing Information		Evaluators	HiringManager, Gen (X-FG_HIRING_MANAGER)
Buyer Information			
Bill To Nedbank Ltd:			
135 Rivonia Road Sandton ZAF, 2196			
Tax Number	4320116074		
SOW Rules			
Auto Calculate Maximum Budget		No	
Maximum Budget Entered By defaults to		Buyer	
Add Attachment to Statement of Work		No	•
Enable SOW Headcount Cap		No	
Allow Assistance For SOW Creation		No	
Allow Additional Invoice Currency		No	
Discounts can be defined on the SOW		No	<u>^</u>
Display Spend Allocation Details		No	

Field name	Description
Billing Information	The buyer and Nedbank's billing information.
SOW Rules	These are default rules that we set up, so you do not need to complete this section.

At the bottom of your screen, you will see the following:

SOW Worker Rules

Allow changes to Site and Location on the SOW Work Order/Worker		Worker	Buyer	
Allow Supplier to C	lose SOW Worker		No	
Supplier must subm	it Resume/CV		Yes	
SOW Worker Spend estimation based on number of positions and period		and period	Yes	
Disallow Supplier to add SOW Worker until SOW is completely Approved		ly Approved	No	
Comments (SC	W Bid)			
Entered	Name	Comment		
2023-08-09 02:36				

PM	Gen_HiringManager	Please provide quote on work stipulated above.
----	-------------------	--

Field name	Description
SOW Worker Rules	Part of the default rules that we will set up.
Comments (SOW bid)	The person capturing the bid can add comments here.

Clauses tab

Train B sow	ing BID				Submit Edit Decline 🗐 🚖
Status	SOW Bid ID	Period	Buyer		
Draft	NDBKTQ00000496	2023-08-01 to 2023-12-31	Nedbank Limited		
Bid Resp	onse Detaits Clauses	Characteristics SOW Workers	Questions Related		Q
✓ Exp	band All				
↑ In St	nportant Note atus: Pending Owner Review				Actions ~
Compar	e Versions 2 (Supplier Name	and Surname) 🗸	~		
≏ Dr	aft TD Template				Read Only Yes Mandatory No
Restri	icted Clause E familiarise yourself with the a	ttached draft contract template which cont	ains the standard terms and con	rditions.	
THE BE	ST RUN				<u>^</u>
Last Login	Time: 2023-08-25 01-09 PM S	AST			SAP Fieldstass 2308 I 038

The state mainly consists of a draft TD. At this stage of the bid it very important that you read and understand the TD, as it will form part the final SOW contract. If you do not agree with the terms and conditions or if you would like to add anything, it is important to raise it at this stage.

Once the contract has been approved, you will receive it for signature (electronic signature) and it will be legally binding.

TD example

le Edit View Sign Window Help				
Home Tools [Document_name] × Process Flow SOW (2)	1	L	Sigr	ln .
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TRANSACTION DOCUMENT: CONSULTING SERVICES				-
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NEDBANK LIMITED			٩	₽
				1-
and				B
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				Po

ile Edit View Sign Window Help Home Tools [Document_name] × Process Flow SOW	?		Sigr	ı In
		Q.		0
Page 3 WHEREBY THE PARTIES AGREE AS FOLLOWS -			1	
1 INTERPRETATION In this Transaction Document (and any Annexes hereto), unless the context indicates a contrary intention, the following words and expressions bear the meanings assigned to them and cognate expressions bear corresponding meanings -			٩	
1.1 "Commencement Date" shall mean [Start Date], being the commencement date of this Transaction Document, the date of signature hereof notwithstanding, it being specifically recorded that the definition of Effective Date in the Services Agreement shall not apply to this Transaction Document;				26 Ca Ca Ca Ca Ca

Characteristics tab

SAP Fieldglass Beta Mode		Search by ID or text	٩	≇ @ [∰] Ω ⁰ ⑦ ST
Home View Create Analyti	cs			
Training BID B SOW Bid				Submit Edit Decline 🗉 😭
Status SOW Bid ID	Period	Buyer		
Draft NDBKTQ00000496	2023-08-01 to 202	3-12-31 Nedbank Limited		
Bid Response Details Clauses	Characteristics	W Workers Questions Related		Q
Characteristics				
From 2023-08-01 💾 to 2023-	12-31			Apply Fitters
All Event Schedule				
				0 Items Found
Status Type	Line Item ID	Revision Name		Due On Requested Amou
All Y All	← Enter Criteria	Enter Criteria		

Once you have received the bid, the Characteristics tab will be blank. You need to complete the details, including how you will charge us.

SOW Workers tab

SAP Fieldglass Beta Mode	Search by ID or text	Q. 蒜 @	🚰 🗘 🔍 🖓 💭
Home View Create Analytics			
→ SOW Bid List			
Training BID B SOW Bid		Submit Edit	Decline 🗉 🚖
Status SOW Bid ID Period Bu	uyer		
Draft NDBK1Q00000496 2023-08-01 to 2023-12-31 N	ledbank Limited		
Bid Response Details Clauses Characteristics SOW Workers C	Questions Related		Q
No Active Workers Listed		h .	
SOW Worker Rules		Time Sheet Rules	
SOW Workers	Yes	Time Sheet Type	Standard
Auto Register SOW Worker	No	Time Sheet Frequency	Weekly and Monthly
		Hours per Day	8
Expense Sheet Rules		Hours per Week	40
Give Workers access to all Expense Codes for the Cost Centers	No	Allow Worker to submit Time Sheets	Yes
		Allow Time Capture in Hundredths of Hours	Yes

The sourcers tab should be completed only if the bid has 'time' and 'material' contractors or workers.