



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.

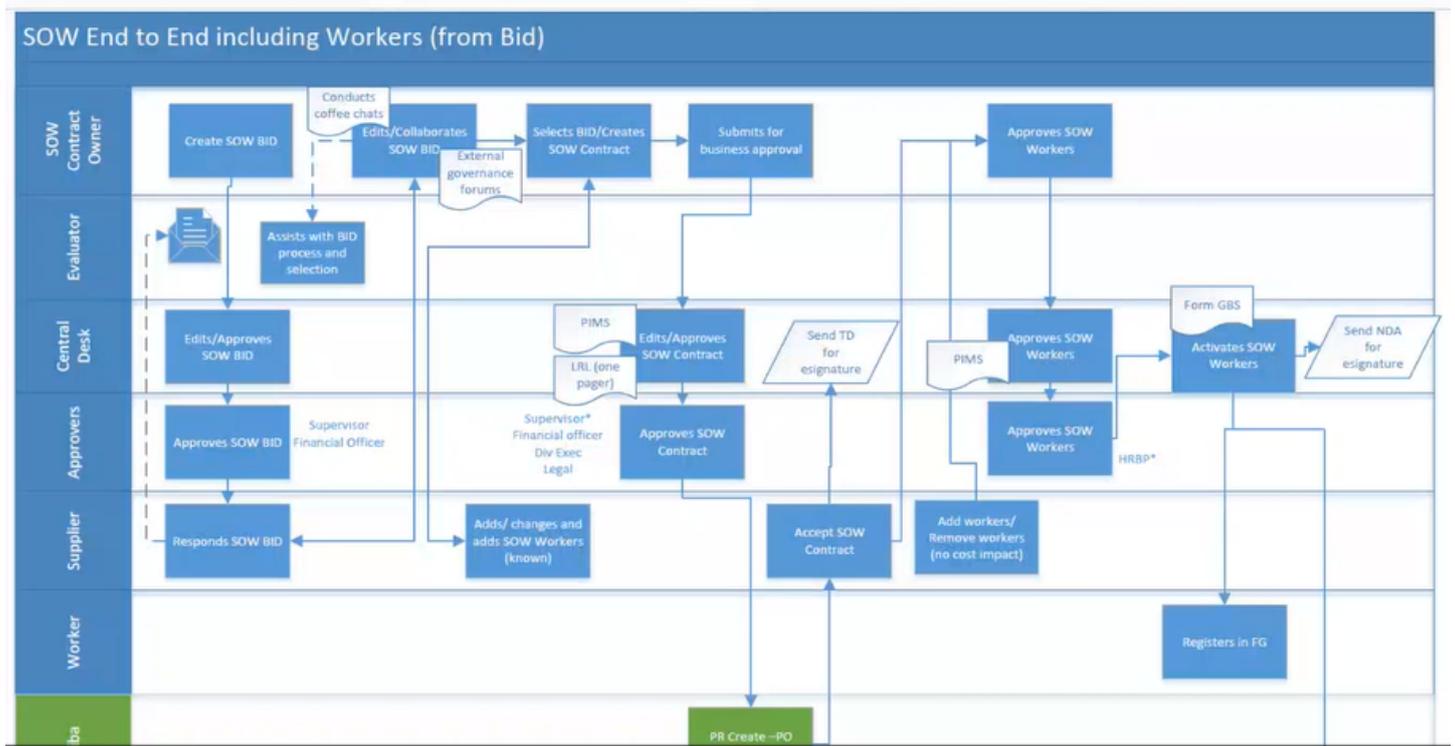
Going forward, you (as the supplier) must first receive a bid from Nedbank in order to do business with us. The new process offers a lot more advantages, including making you more visible to all our business units. Over time, the process will also be rolled out to the Nedbank Africa Regions, giving you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

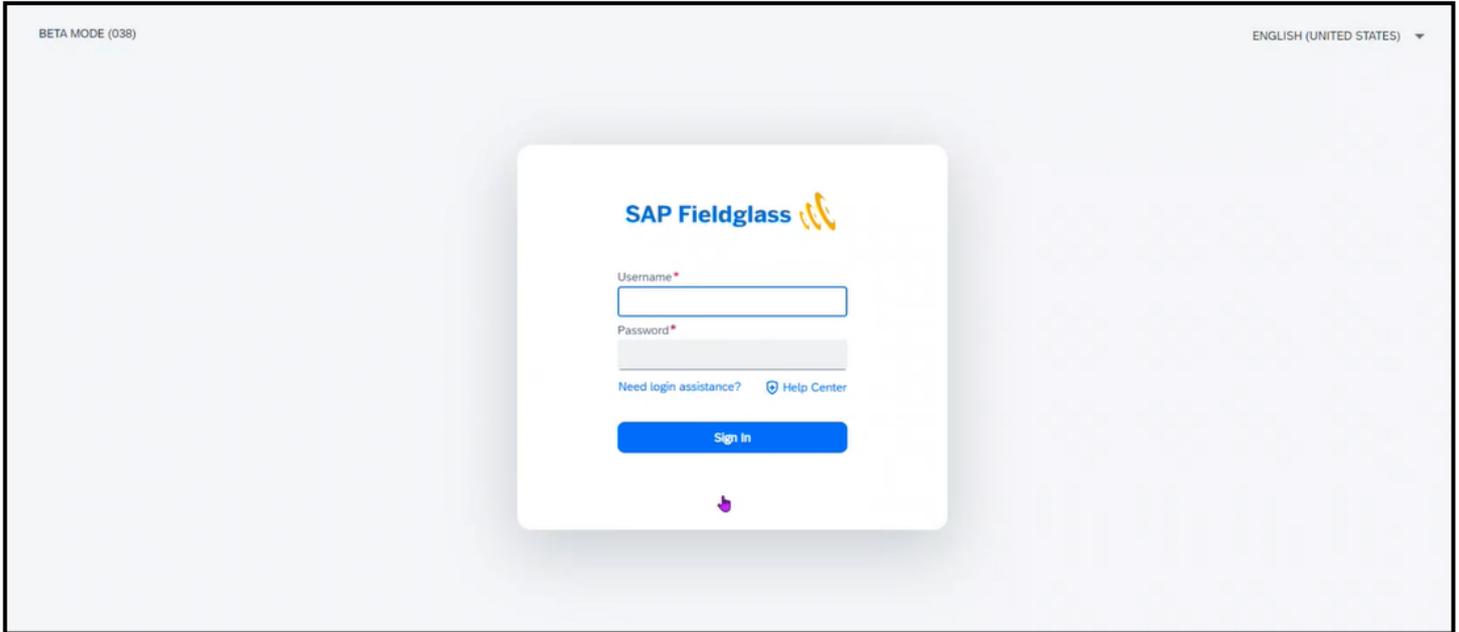
- If your bid is successful and accepted, it will be approved and converted into a contract. That is why it is so important to ensure that the information captured in Fieldglass is correct. **The contract will be legally binding.**
- During this process the transaction document (TD) is also created and 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 resourced 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 add 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

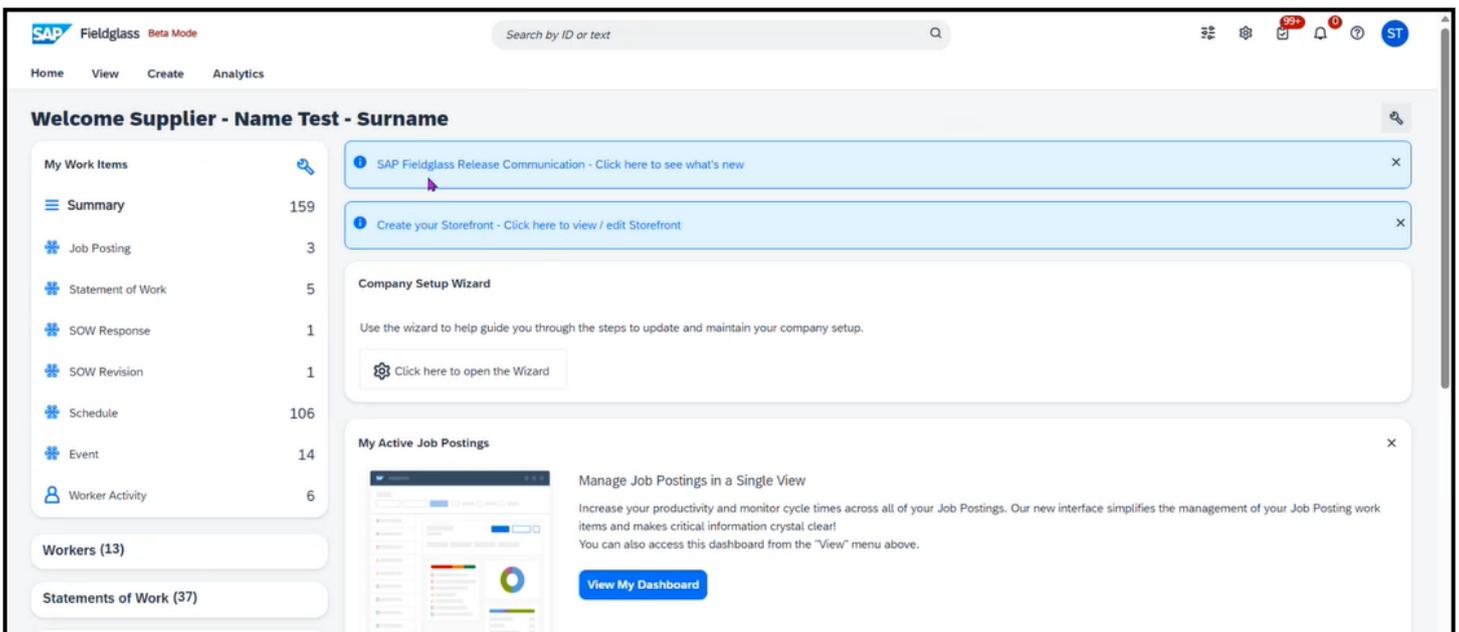


To access SAP Fieldglass, complete the following compulsory fields:

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.

Click on  to continue. You will then see the following screen.



You can then select the relevant sections for completion.

Field name	Description
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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

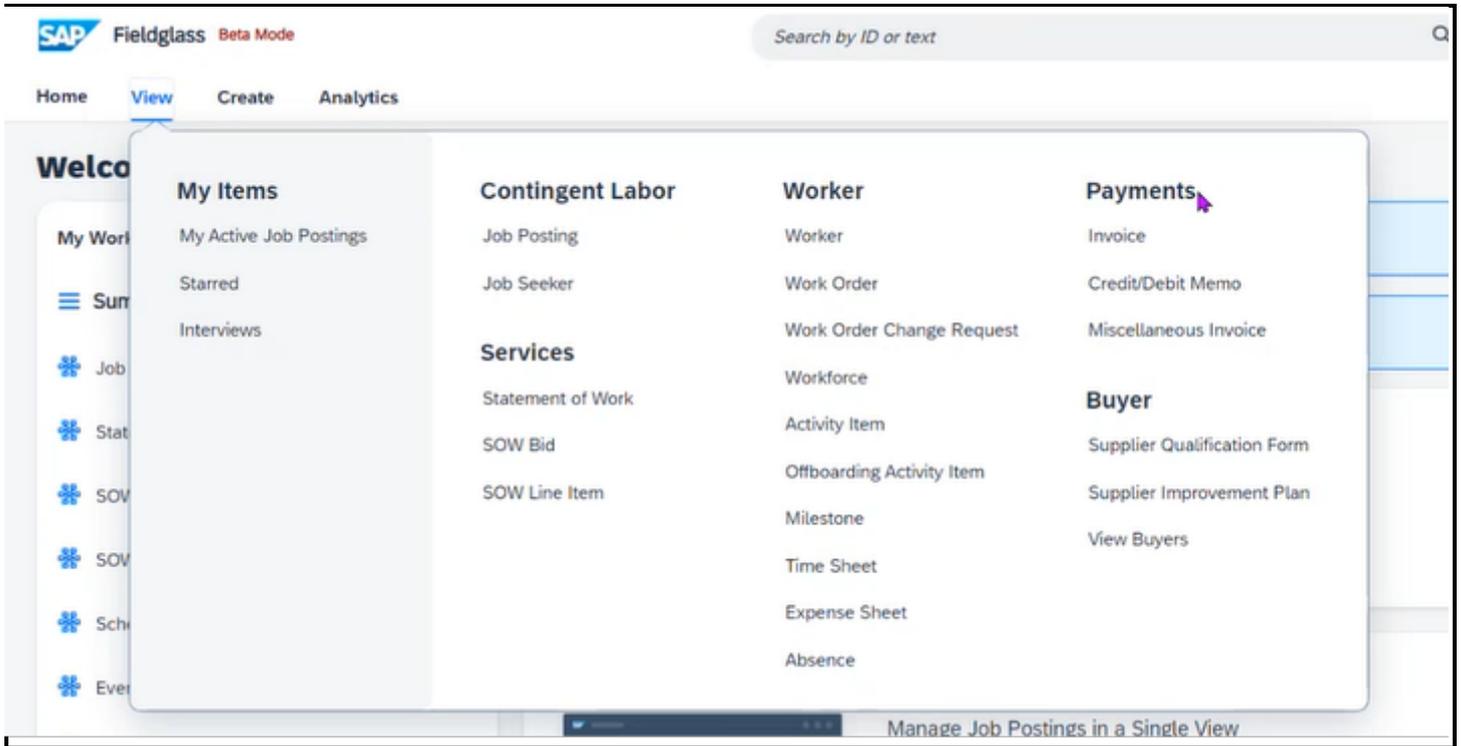
You can also use this button at the top right of your screen to view the items in the Work Area.



Button

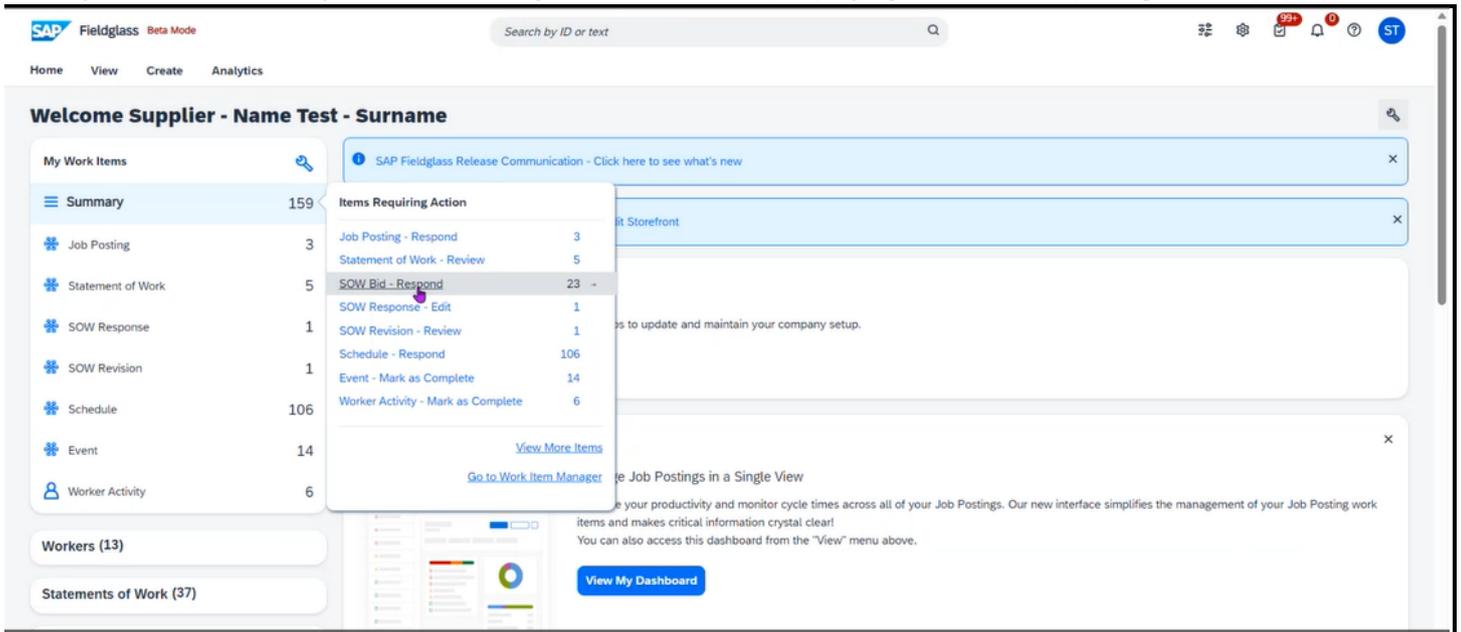
Description

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

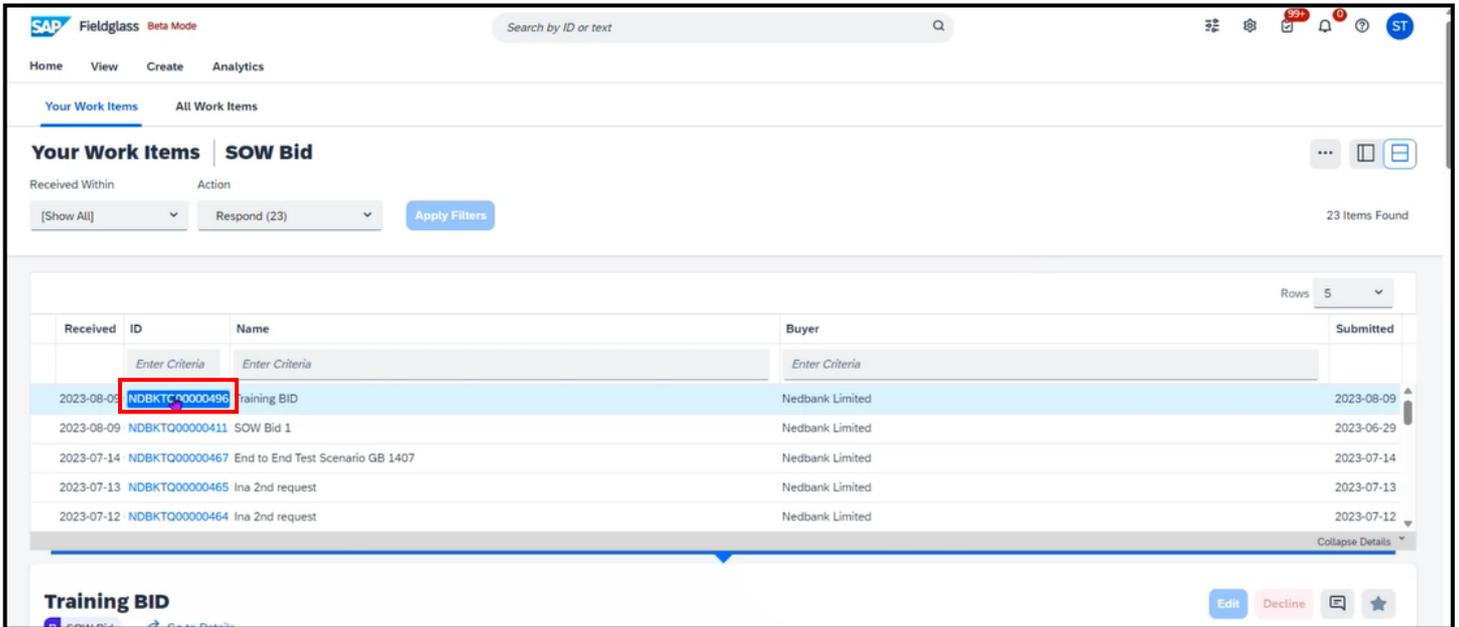


Viewing a summary of various categories

When you click on [View](#) you will see the **My Work Items** label, displaying the **Items Requiring Action** pop-up box.

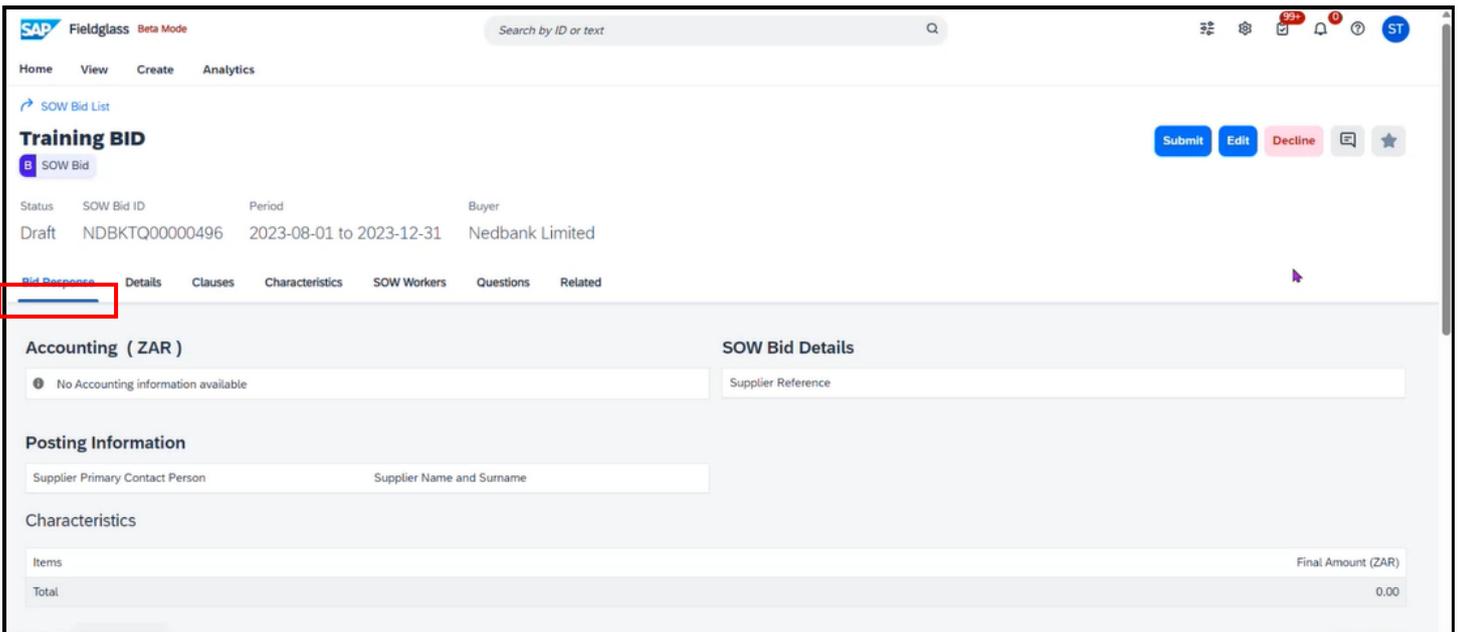


In the example above, the **SOW Bid - Respond** listed item was selected, displaying a list of bids:



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

Bid response tab



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 NDBKTQ0000496 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

Accounting (ZAR)

Cost Allocation	%
TEST_DFL - RPA (CNGT10112)	100.000
Total	100.000

Posting Information

Owner	Gen_HiringManager
Creator	Gen_HiringManager
Create Date	2023-08-09
Submit Date	2023-08-09
SOW Bid Respond By Date	2023-08-11
PO Number	
Type	SOW Bid
SOW Coordinators	Team, Central Desk

Billing Information

Buyer Information

SOW Bid Details

Buyer Reference	
Billable?	Yes
Master SOW?	No
Site	TEST_CONSTANTIA KLOOF ROODEPOO (4025382054)
Location	TEST_CONSTANTIA KLOOF ROODEPOO (4025382054)
Default Remit-to Address	
Business Unit	Group Procurement (1000)
Description:	Put in as much information as necessary for the supplier to be able to quote you effectively.
Defined By	Buyer and Supplier
Characteristics	Schedules Events SOW Workers
Evaluators	HiringManager, Gen (X-FG_HIRING_MANAGER)

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

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

The screenshot shows the 'Training BID' interface. At the top right, there are buttons for 'Submit', 'Edit', 'Decline', and a star icon. Below the header, there are two tabs: 'SOW Bid' (selected) and 'SOW Bid'. The main content area is divided into several sections:

- SOW Coordinators:** Team, Central Desk
- Events:** SOW Workers
- Evaluators:** HiringManager, Gen (X-FG_HIRING_MANAGER)
- Billing Information:**
 - Buyer Information
 - Bill To Nedbank Ltd:
 - 135 Rivonia Road
 - Sandton
 - ZAF, 2196
 - Tax Number: 4320116074
- SOW Rules:** A table of rules with columns for the rule name and its value.

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
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:

The screenshot shows the 'SOW Worker Rules' and 'Comments (SOW Bid)' sections. The 'SOW Worker Rules' section contains a table of rules:

Allow changes to Site and Location on the SOW Work Order/Worker	Buyer
Allow Supplier to Close SOW Worker	No
Supplier must submit Resume/CV	Yes
SOW Worker Spend estimation based on number of positions and period	Yes
Disallow Supplier to add SOW Worker until SOW is completely Approved	No

The 'Comments (SOW Bid)' section shows a table with columns for 'Entered', 'Name', and 'Comment':

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

Training BID Submit Edit Decline ? ★

SOW Bid

Status: Draft SOW Bid ID: NDBKTQ00000496 Period: 2023-08-01 to 2023-12-31 Buyer: Nedbank Limited

Bid Response **Details** **Clauses** Characteristics SOW Workers Questions Related

Expand All

Important Note
Status: Pending Owner Review Actions

Compare Versions: 2 (Supplier Name and Surname)

Draft TD Template Read Only Yes Mandatory No

Restricted Clause
Please familiarise yourself with the attached draft contract template which contains the standard terms and conditions.

THE BEST RUN **SAP**

Last Login Time: 2023-08-25 01:08 PM SAST SAP Fieldglass 2308.1.03R

The [Clauses](#) tab 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

ie Edit View Sign Window Help

Home Tools [Document_name] x Process Flow SOW ... ? 🔔 Sign In

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TRANSACTION DOCUMENT: CONSULTING SERVICES
(VENDOR RESOURCE ROLE)

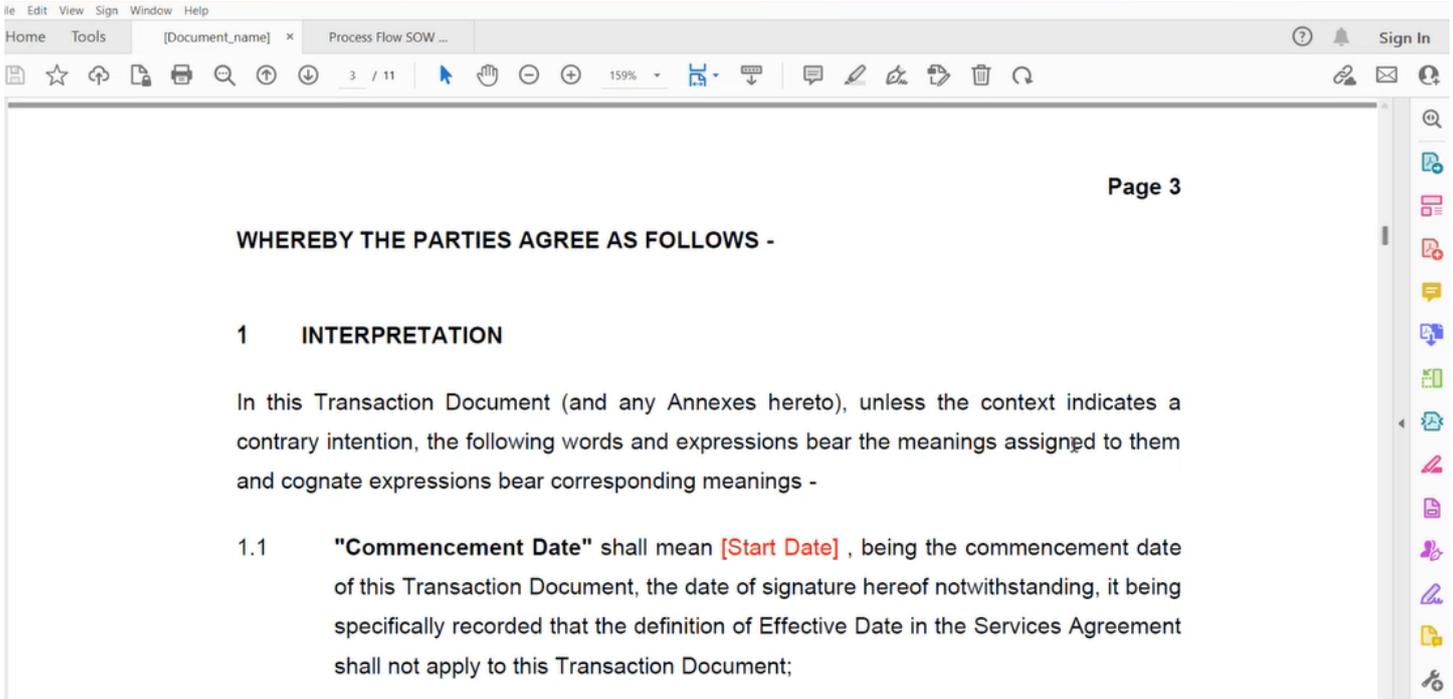
between

NEDBANK LIMITED

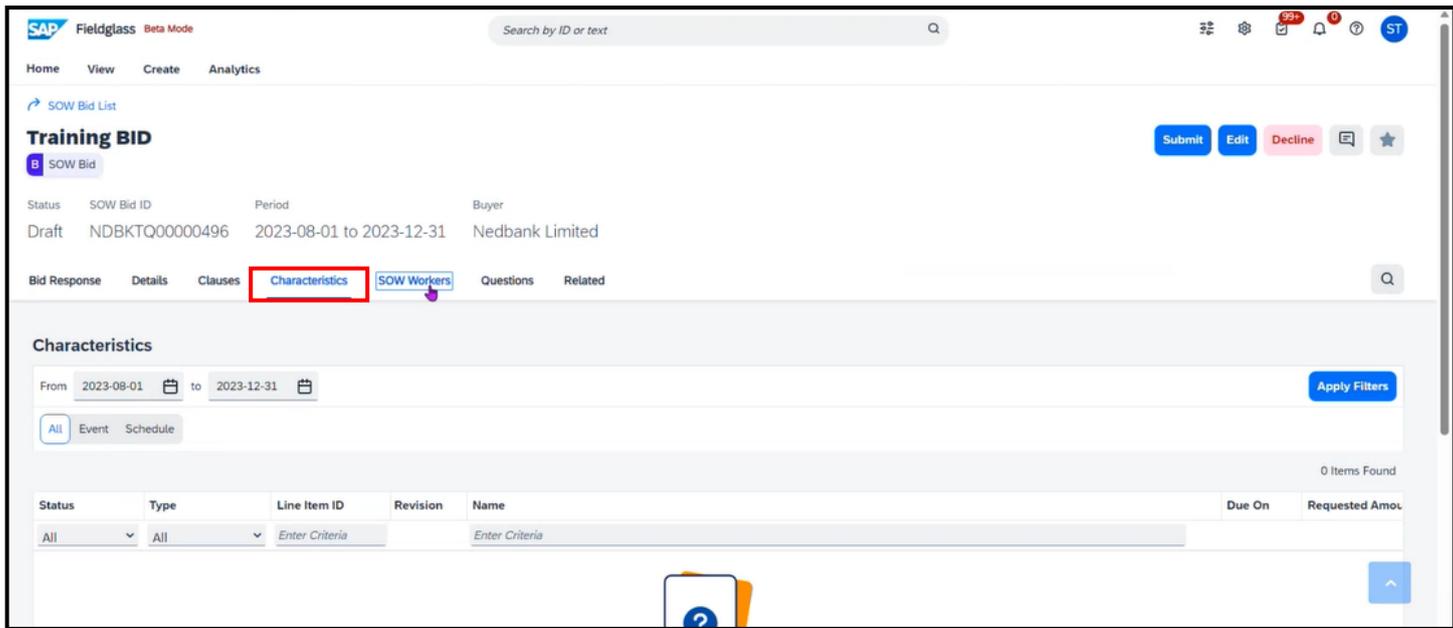
and

VENDOR (PROPRIETARY) LIMITED

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Characteristics tab



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

The screenshot shows the SAP Fieldglass interface for a 'Training BID'. The 'SOW Workers' tab is highlighted with a red box. The main content area displays 'No Active Workers Listed'. Below this, there are three sections: 'SOW Worker Rules', 'Expense Sheet Rules', and 'Time Sheet Rules', each with a table of settings.

SOW Worker Rules

SOW Workers	Yes
Auto Register SOW Worker	No

Expense Sheet Rules

Give Workers access to all Expense Codes for the Cost Centers	No
---	----

Time Sheet Rules

Time Sheet Type	Standard
Time Sheet Frequency	Weekly and Monthly
Hours per Day	8
Hours per Week	40
Allow Worker to submit Time Sheets	Yes
Allow Time Capture in Hundredths of Hours	Yes

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