SAP Fieldglass Services User Guide

Creating an Invoice & Fieldglass FAQ

August 2024

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OVERVIEW

This guide outlines the steps needed to submit an Invoice into Fieldglass as well as outlines some answers to Frequently Asked Questions (FAQ).

The Fieldglass Statement of Work (SOW) must be fully approved, including any required internal financial approval and, if applicable, DocuSign execution before any work can begin or invoices generated.

All questions about an SOW before, during, and after approval can be directed to the AgileOne onsite team: contractor.ts@mheducation.com

NOTE: When submitting an invoice, please ensure that **Auto Invoice is always marked Yes.** If not marked Yes, a delay in payment should be expected.

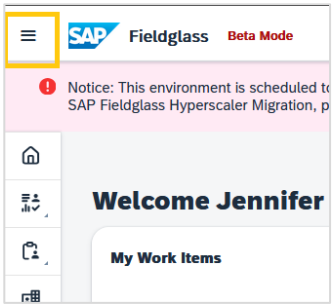
Effective October 2020, there is a 2.2% administrative fee applied to all invoices process in the Fieldglass system. This fee will be deducted from the total value of the invoice before payment is made to the Supplier.

HOW TO INVOICE IN FIELDGLASS

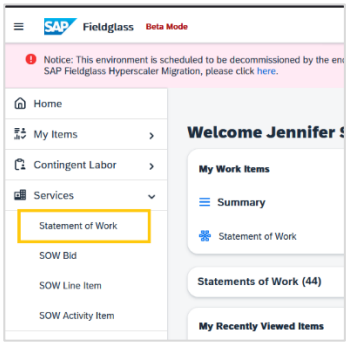
- Creating an **invoice** is known as creating a **Deliverable/Milestone or Fee**.
- **Fees** can be generated for all or a partial amount of **Units**. If a partial amount is billed, additional invoices (Fees) can be submitted up to the maximum amount allowed in the SOW.
    - Example: The SOW has 100 available **Units**. You may invoice for all 100 units as one Fee, or you may invoice 4 **Fees** of 25 units each.
- A Video Tutorial on Invoice Creation is available here.

Deliverable/Milestone or Fee Creation

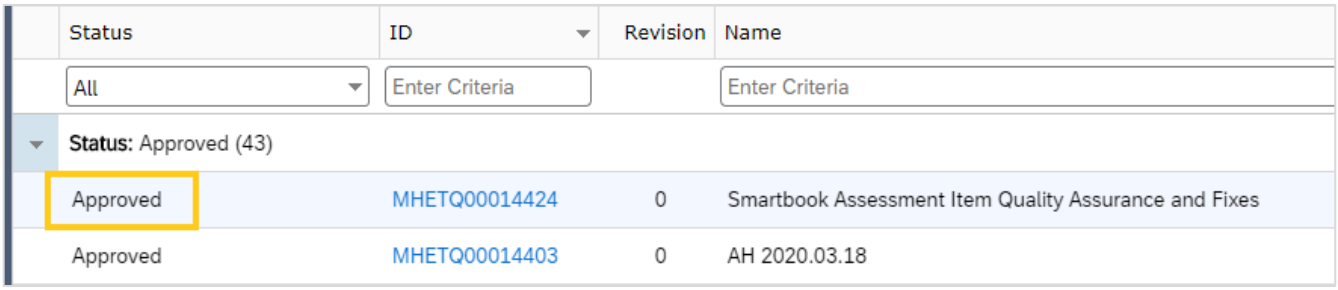
1. Login to Fieldglass using the username and password created upon initial registration.
2. Click the **Menu Icon** at the top left of the page to open the menu items.



3. Select **Services** then **Statement of Work**. The list of SOWs associated to the logged in supplier will be listed.



Items that are in the status **Approved** are active and ready for Fee creation.

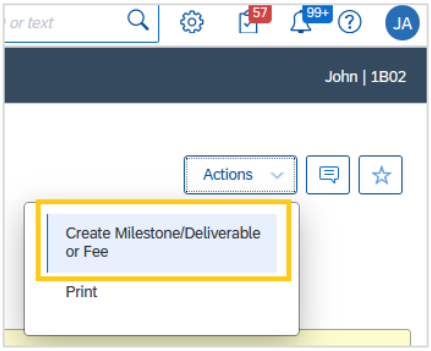


Status	ID	Revision	Name
All	Enter Criteria		Enter Criteria
Status: Approved (43)			
Approved	MHETQ00014424	0	Smartbook Assessment Item Quality Assurance and Fixes
Approved	MHETQ00014403	0	AH 2020.03.18

4. Click on the **Statement of Work ID** for the item to be viewed. The **SOW ID** is a 12-digit code that begins with MHETQ (MHETQXXXXXXXX).

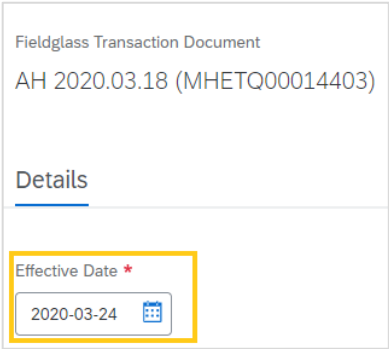
   Note: The dates in the **Period** fields can be ignored. Fieldglass auto-populates these fields based on your active SOWs.

5. Click **Actions**. A menu will load.

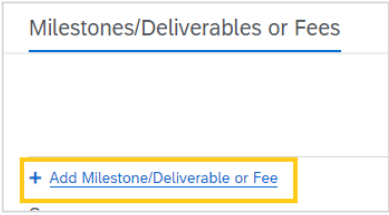


6. Select **Create Milestone/Deliverable or Fee**.

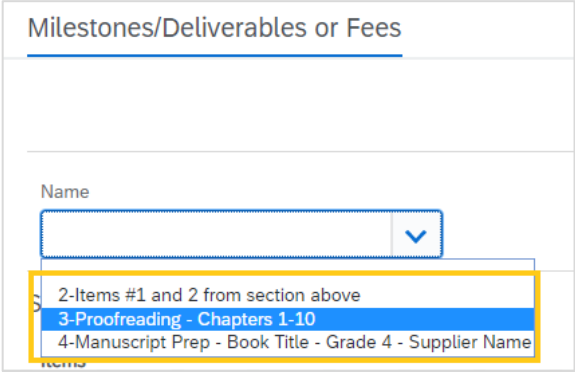
7. Enter the **Effective Date** of your invoice.



8. Scroll to the **Milestones/Deliverables or** Fees section. Select **+Add Deliverable/Milestone or Fee.**

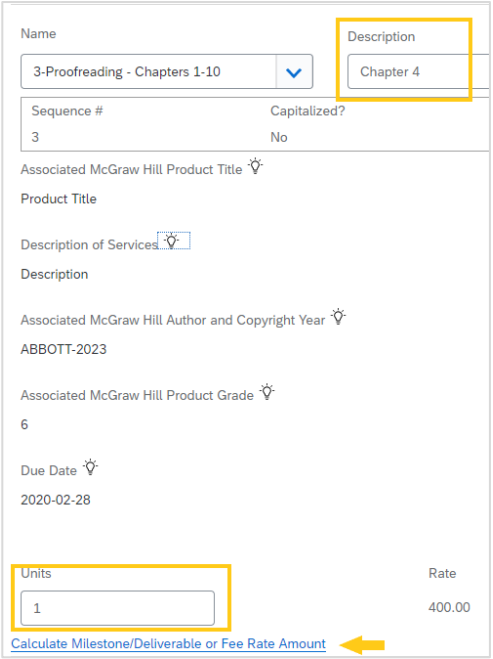


9. From the drop-down menu that appears, select the item to which the Fee is being charged.



10. Enter the **Description** of the services performed.

11. Enter the number of **Units** to be charged. To confirm the total dollar amount being charged, click Calculate Deliverable/Milestone or Fee Amount.



12. Click **Continue**.

13. Review the displayed information. If correct, select **Submit**. If changes are necessary, click **Make Changes**.

Viewing Submitted Fees and SOW Detail

1. Login to Fieldglass.

2. Select View then Statement of Work.

    a. Click on the Statement of Work ID for the item to be viewed. The SOW ID is a 12-digit code that begins with MHETQ (MHETQXXXXXXXX).

3. Review the SOW information using the tabs listed under the SOW title and ID.

Tab Label	Description
Details	The tab contains the **description** of the project, the total budget summary, and the attachment that contains the signed SOW. The signed SOW can be downloaded as many times as necessary. Upon revision, a new attachment will appear in addition to the original.
Manage	This tab contains activity items related to the document generation. **No action** is needed from you on this tab.
Clauses	This tab contains the **legal clauses** agreed to

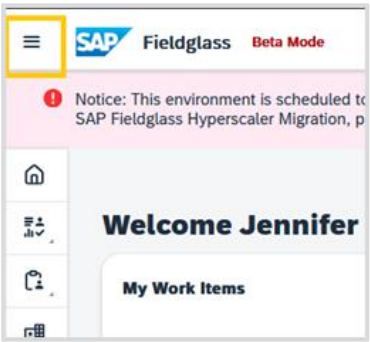
Tab Label	Description
	upon signature of the Statement of Work. The clauses viewed here are the same as those in the document attached in the **Details** tab.
Deliverables/Milestones, Due Date & Fees	This tab contains the list of individual **Milestones/Deliverables (Fees)** associated with the project. The Fee detail can be viewed by clicking on the Name of the Fee. This tab also contains the list of **Invoices** already charged to the SOW and the Invoice status.
Related	This tab contains the list of items that are related to this **Statement of Work**. Typically, only the invoices charged against the Statement of Work will appear in this tab.

Revising an Invoice/Fee

In the event an invoice has been submitted with incorrect information and already approved, you may **Revise** the invoice to correct the values.

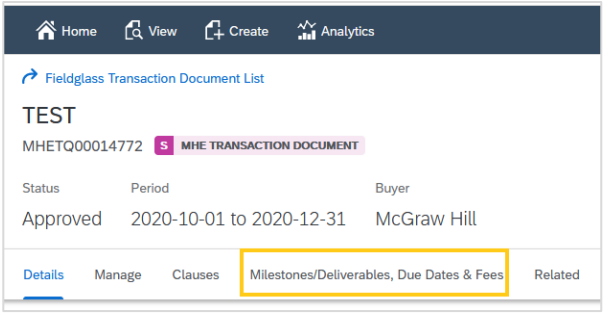
1. Login to Fieldglass using the username and password created upon initial registration.

2. Select **Services** then **Statement of Work**. The list of SOWs associated to the logged in supplier will be listed.

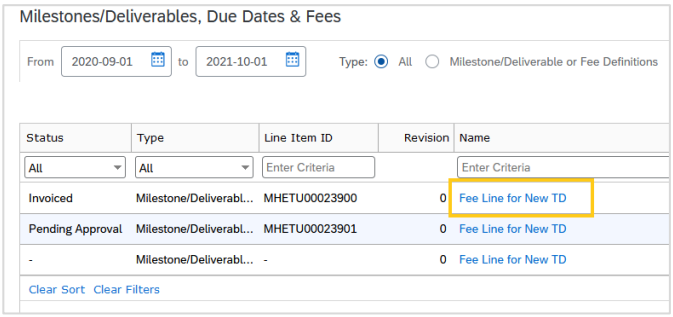


3. Click on the Statement of Work ID for the Project the invoice was applied to. The SOW ID is a 12-digit code that begins with MHETQ (MHETQXXXXXXXX).

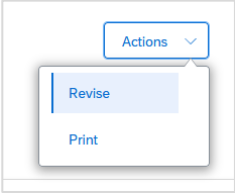
4. Select the **Milestones/Deliverables, Due Dates & Fees** tab.



5. In the **Milestones/Deliverables, Due Dates & Fees** section, click the **Fee Name** for the item to be revised.



6. Select the **Actions** button, then **Revise**.



7. Confirm the **Effective Date** of the invoice is still correct. In the **Milestones/Deliverables or Fees** Section make the necessary changes. You may change which Fee the item is allocated to, or you may change the amount of the invoice.

8. Select a **Reason** for the revision and add any comments to be shared.

9. Click **Continue**. Review the information to be submitted, then **Submit**.

The Fee will be sent for **Approval** by the **Owner**. Once approved, it will be processed on the normal invoice payment schedule.

GENERAL FIELDGLASS TIPS

Changing Your Password

Your Fieldglass password can be updated at any time.

1. Click on the people icon in the top right of the page. Select **My Profile**.
   The **Personal Settings** page will open, with the **My Profile** tab displayed.

2. Click **Change Password** in the Account Information section. The Change Password dialog box is displayed.

3. Enter new password information, then click **Change**.

Updating Your Contact Information

You can change your Fieldglass contact email address and set up a list of email addresses to be included in the Cc: field of all email notifications sent from Fieldglass.

1. Click on the people icon in the top right of the page. Select **My Profile**.
   The **Personal Settings** page will open, with the **My Profile** tab displayed.

2. Click **Edit** in the section where your name is displayed.
   The **My Profile – Basic Information** page is displayed.

3. In the **Email** field, enter the email address where all email notifications from Fieldglass should be sent.

4. In the **Cc: Email Addresses** field, enter any email addresses that should be included in the Cc: field of all Fieldglass notifications. Separate each address with a comma or a semicolon.

5. Click **Update** to save your changes.

Updating Your Fieldglass Preferences for Email Notifications

1. Click on the people icon in the top right of the page. Select **My Preferences**.
   The **Personal Settings** page will open, with the **My Preferences** tab displayed.

2. Click **Edit** to the right of **Locale** to change time zone.

3. Scroll down to **Messaging** section. Click **Edit**.

4. On the **My Preferences – Messaging** page, you may indicate whether you want **Notification, Work Item, Alert, Broadcast, Chat (Contingent), Chat (services)** or **Starred** messages sent to your email address.

FIELDGLASS FAQ AT MCGRAW HILL

Q: I have forgotten my Fieldglass User ID and/or password, how do I retrieve?
A: The Fieldglass Helpdesk is the only party with access to assist. The Fieldglass Helpdesk is open 24x7. When contacting them, be sure to identify yourself as a Supplier in Fieldglass so they can best assist you.

Email: fieldglasshelp@sap.com
Phone: US (toll-free) 866-467-4833

Q: I have reviewed the invoicing instructions but I still need assistance, who do I contact?
A: Please contact the AgileOne team at Contractor.TS@mheducation.com. A dedicated team is available to assist you with the process. The team is available from 8 AM – 5 PM Central Time.

Q: I have submitted my Fieldglass invoice (fee). Do I need to take action in any other system(s)?
A: No. Submitting the invoice in Fieldglass is the last required action.

Q: I have submitted my Fieldglass invoice (fee) but I changed Auto-Invoicing to "No". What should I do?
A:
1. From your Fieldglass homepage, click **Create**, then **SOW Invoice.**
2. Click the SOW to be charged against.
3. Fill out the required information on the setup page. The code will be for your own records.
4. In the **Details** page, add any adjustments or attachments.
5. Review, then **Submit**.

Please contact the AgileOne team at Contractor.TS@mheducation.com for additional assistance.

Q: I have questions about the Fieldglass notifications I am receiving. Who can I contact?
A: Please contact the AgileOne team at Contractor.TS@mheducation.com.

Q: Will I receive direct deposit or a live check from AgileOne for the project worked at McGraw Hill that was invoiced via Fieldglass? If I receive a live check, how do I update my address with AgileOne for future payments or tax statements?
A: When registering with AgileOne, you were given the option to set up direct deposit. If you need to confirm payment method or make changes to your payment method, accounts, or physical address, please contact the AgileOne team at Agile1MHEBilling@agile1.com.

Q: Will I receive remittance details?
A: Yes. You will receive an email from AgileOne with remittance information. If you need confirmation of the email address where the remittance is being sent, or need to update the email address, please

contact the AgileOne team at Agile1MHEBilling@agile1.com.

Q: What are my payment terms? What do I do if I believe my payment is missing and/or late? Who can I contact?
A: Please refer to this the information provided on the McGraw Hill Supplier Accounts Payable page. The table is located near the bottom of the page.

Please note the payment clock starts once McGraw Hill approves the Fieldglass invoice "Fee". If you have not received payments within the correct timeframe, please contact the AgileOne team at Contractor.TS@mheducation.com. AgileOne will only release payment to suppliers once they have received payment from McGraw Hill.