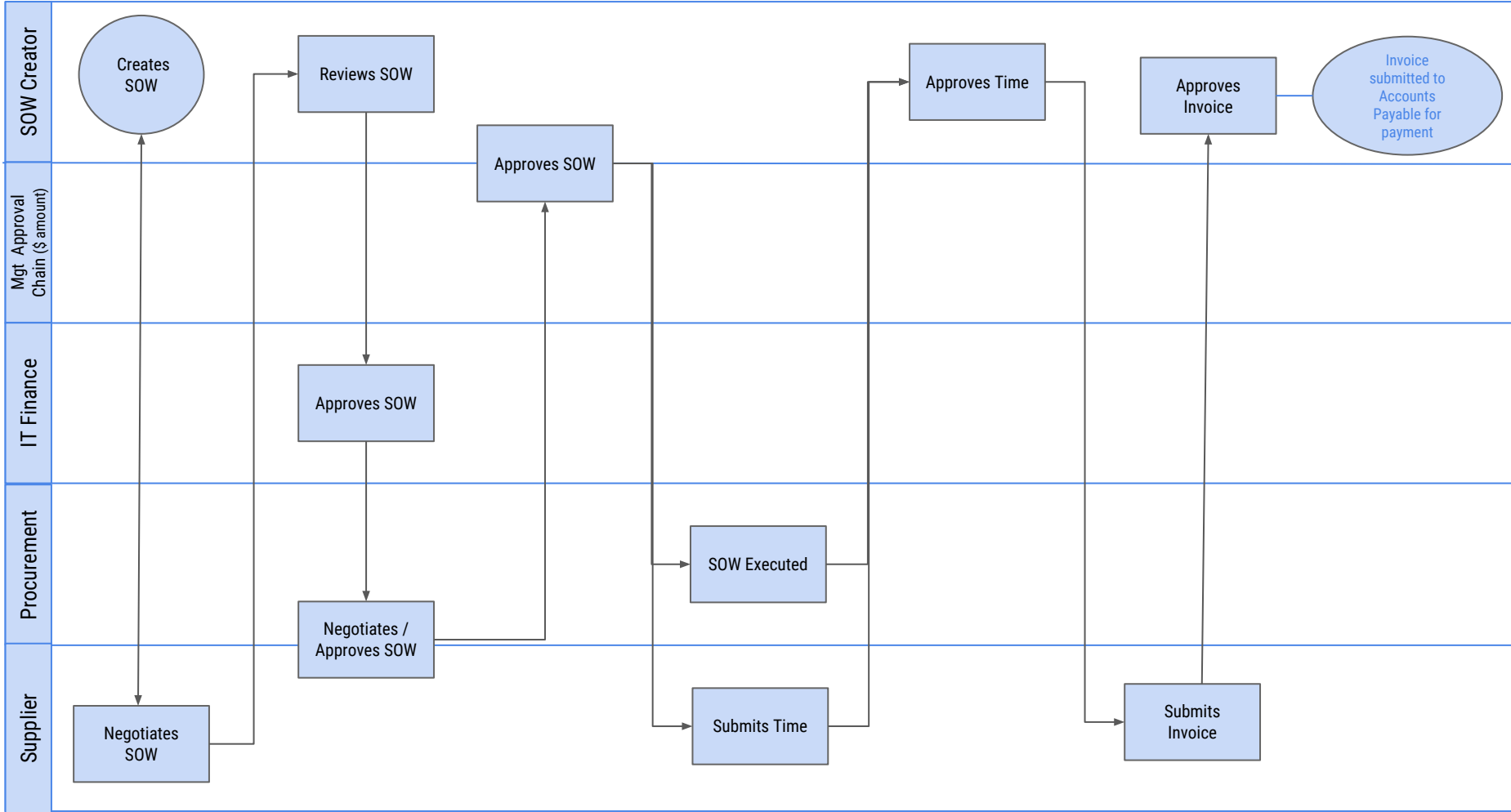# Fieldglass
# IT SOW Automation

Workflow Diagrams

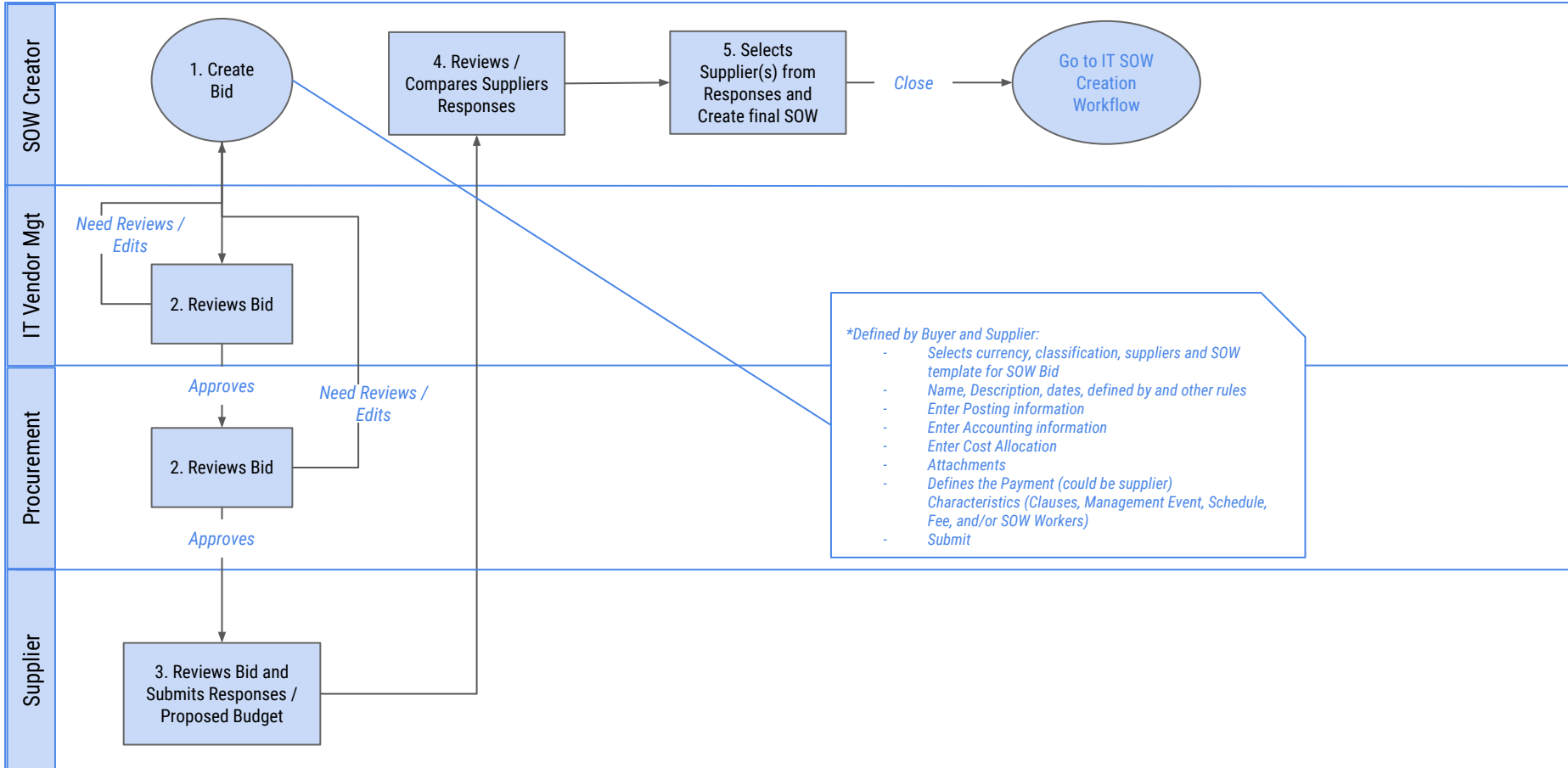# IT Services High-level Process Overview

Blue shapes = *via Fieldglass system*
Grey shapes = *Outside Fieldglass system, other process*

**SOW Creator**

Creates SOW → Reviews SOW → Approves Time → Approves Invoice → Invoice submitted to Accounts Payable for payment

**Mgt Approval Chain ($ amount)**

Approves SOW

**IT Finance**

Approves SOW

**Procurement**

Negotiates / Approves SOW → SOW Executed

**Supplier**

Negotiates SOW → Submits Time → Submits Invoice

# IT SOW Bid Creation

**SOW Creator**

1. Create Bid

4. Reviews / Compares Suppliers Responses

5. Selects Supplier(s) from Responses and Create final SOW

*Close*

Go to IT SOW Creation Workflow

**IT Vendor Mgt**

*Need Reviews / Edits*

2. Reviews Bid

*Approves*

*Need Reviews / Edits*

**Procurement**

2. Reviews Bid

*Approves*

*\*Defined by Buyer and Supplier:*
- *Selects currency, classification, suppliers and SOW template for SOW Bid*
- *Name, Description, dates, defined by and other rules*
- *Enter Posting information*
- *Enter Accounting information*
- *Enter Cost Allocation*
- *Attachments*
- *Defines the Payment (could be supplier)*
- *Characteristics (Clauses, Management Event, Schedule, Fee, and/or SOW Workers)*
- *Submit*

**Supplier**

3. Reviews Bid and Submits Responses / Proposed Budget

# IT SOW Creation

**SOW Creator**

1. Create SOW

3. Reviews & Submits SOW

4. Finalizes SOW / Submits for Approval

*Edits/Supplier re-review needed*

6.1 Edits/ Closes?

*Close*

11. Activates Worker / Work Order

Go to SOW Payment Characteristics Activity Item or SOW Worker T&E

*Edits/Submits for approval*

**Mgt Approval Chain ($ amount)**

*Sent for Approval*

*Rejects*

*Rejects*

8. Approve /Reject?

*Payment Characteristics include: Management Event, Schedule, or Fee*

**IT Finance**

*Collaborate*

*Reviewed*

*Send back to Supplier*

5. Reviews & Submits SOW

6. Approve /Reject?

*Approves*

**Procurement**

*Approves*

*Rejects*

7. Approve /Reject?

*Approves*

Procurement enters SOW into Apttus outside the Fieldglass system to obtain Legal approvals prior to approving in Fieldglass.

**Supplier**

*Rejects*

2. Reviews SOW

9. Approve /Reject?

10. Submits Response. Adds Workers

# IT SOW Management Event Process Flow (milestones/deliverables)

# IT SOW Revision

**SOW Creator**

1. Create SOW Revision

3. Reviews & Submits SOW

4. Finalizes SOW / Submits for Approval

6.1 Edits/ Closes?

*Close*

11. Activates Worker / Work Order

Go to SOW Payment Characteristics Activity Item or SOW Worker T&E

*Payment Characteristics include: Management Event, Schedule, or Fee*

**Mgt Approval Chain ($ amount)**

*Sent for Approval*

*Rejects*

8. Approve /Reject?

**IT Finance**

*Collaborate*

*Reviewed*

*Send back to Supplier*

5. Reviews & Submits SOW

6. Approve /Reject?

*Approves*

*Approves*

**Procurement**

*Rejects*

*Approves*

7. Approve /Reject?

**Supplier**

2. Reviews SOW

*Rejects*

9. Approve /Reject?

10. Submits Response. Adds Workers

# IT SOW Invoice (automatically generated)

Blue shapes = via Fieldglass system
Grey shapes = Outside Fieldglass system, other process

**SOW Owner**

2.
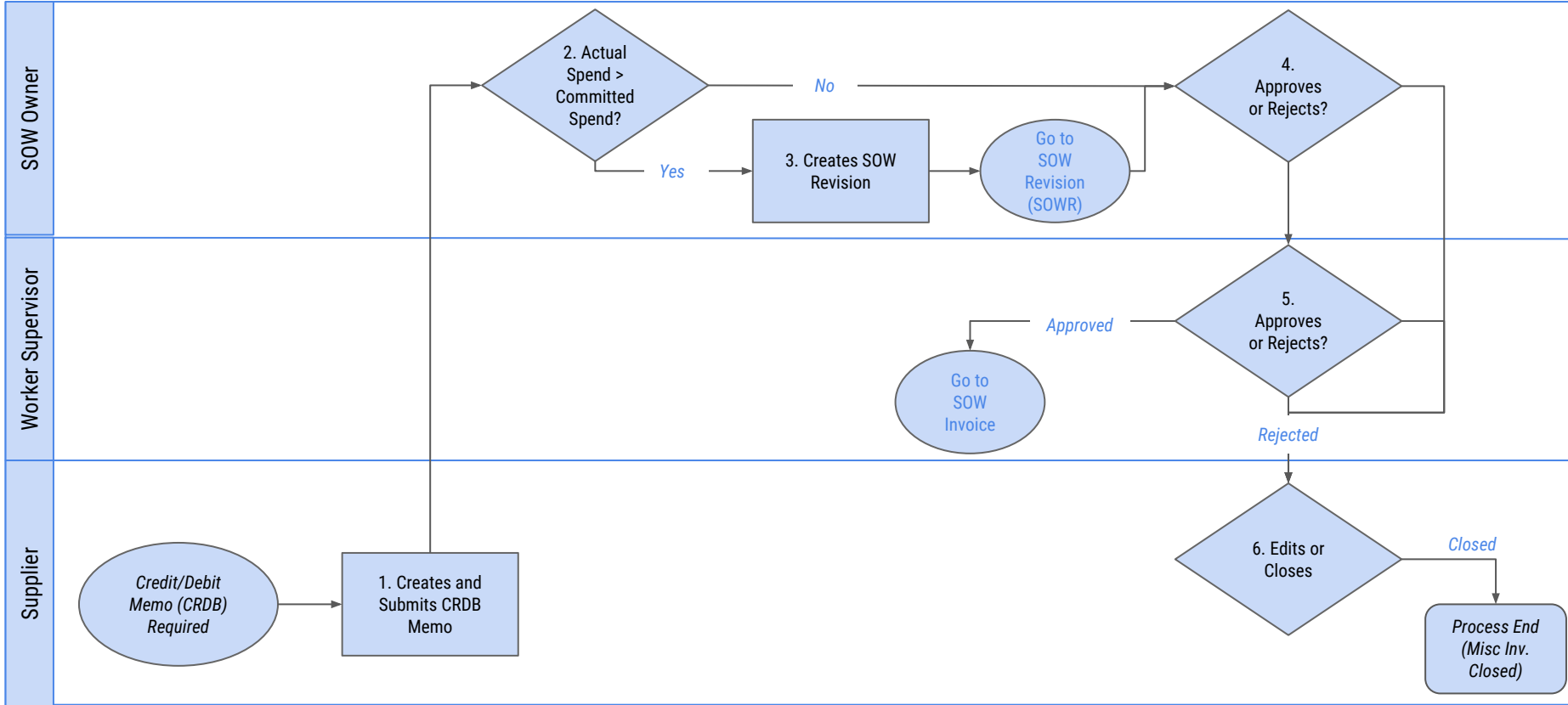Approve
/Reject?

Fieldglass System generates invoice file

Invoice File delivered to Accounts Payable SFTP Server

Approve

**Accounting**

Reject

3. Remits Payment to Suppliers

4. Remits Payment to Suppliers

**Supplier**

From Payment Characteristics (system)

1. Submits / Edits SOW Milestones & Deliverables

5. Remits Payment to SAP Fieldglass

End

# Credit/Debit Memo Process Flow

Blue shapes = *via Fieldglass system*
Grey shapes = *Outside Fieldglass system, other process*

**SOW Owner**

2. Actual Spend > Committed Spend?

No

4. Approves or Rejects?

Yes

3. Creates SOW Revision

Go to SOW Revision (SOWR)

**Worker Supervisor**

5. Approves or Rejects?

Approved

Go to SOW Invoice

Rejected

**Supplier**

Credit/Debit Memo (CRDB) Required

1. Creates and Submits CRDB Memo

6. Edits or Closes

Closed

Process End (Misc Inv. Closed)

# IT SOW Team Member Onboard Activity Checklist Process Flow
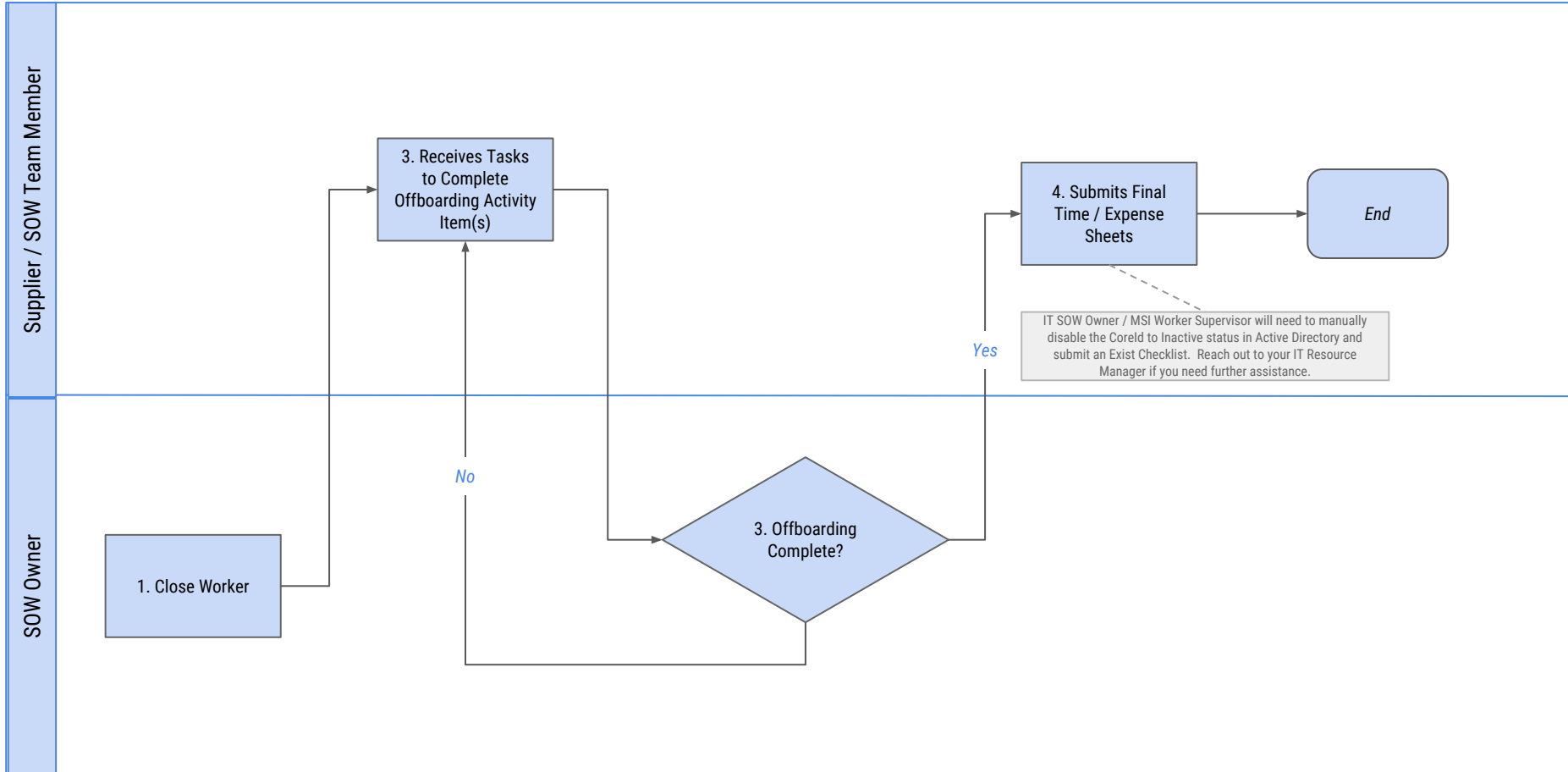
Blue shapes = via Fieldglass system
Grey shapes = Outside Fieldglass system, other process

**Supplier / SOW Team Member**

From SOW

1. Receives Tasks to Complete Activity Items(s)

3. Receives Registration Email

4. Registers in SAP Fieldglass

Go to Team Member T&E

*Fieldglass will auto-retrieve a CoreId & Email for new workers*

Yes

**SOW Owner**

No

2. Activity Item(s) Complete?

# IT SOW Team Member Offboard Activity Checklist Process Flow

**Supplier / SOW Team Member**

3. Receives Tasks to Complete Offboarding Activity Item(s)

4. Submits Final Time / Expense Sheets

*End*

*Yes*

IT SOW Owner / MSI Worker Supervisor will need to manually disable the CoreId to Inactive status in Active Directory and submit an Exist Checklist. Reach out to your IT Resource Manager if you need further assistance.

**SOW Owner**

*No*

1. Close Worker

3. Offboarding Complete?

# IT SOW Team Member Timesheet Process Flow

**Supplier/SOW Team Member**

Starts from Team Member Onboarding

1. Edits and Submits Timesheet

1. Edits and Submits Timesheet or Expense Report

**SOW Owner**

*If the Actual Spend exceeds the Committed Spend, the Hiring Manager Cannot approve the Timesheet until the SOW Revision (SOWR) is created by the SOW Owner and approved.*

2. Actual Spend > Committed Spend?

Yes → 3. Creates SOW Revision (SOW) → Go to SOW Revision (SOWR)

No

*Rejects*

**Team Member Supervisor**

4. Reviews Timesheet

5. Approves or Rejects?

*Approves* → Non-billable (Reporting/ Tracking purposes only)

**Supplier**