SAP Fieldglass Services User Guide

Statement of Work (SOW)

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Run Simple

COMPANY INFORMATION

Disclaimer

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USING THIS GUIDE

This guide is intended to be used as a general aid for customer end users creating a statement of work (SOW) in SAP Fieldglass. The instructions support the process for locating the services modules, submitting an SOW to suppliers, and managing the SOW throughout its lifecycle.

This guide does not provide the Administrator permissions and processes required to set up the SOW module. However, when administration information is applicable, it is noted in this document and often refers the reader to the Services Administration Guide for additional information.

This guide provides a full overview of the available settings for the SOW module. Please note that, depending on the customer's company configuration settings, the pages of the SOW may appear differently than what is documented in this guide.

SERVICES: STATEMENT OF WORK (SOW)

Introduction

A **Statement of Work** (SOW) is a formal document that captures and defines the work activities, deliverables, and timeline a vendor must execute in performance of specified work for a customer.

Creating and maintaining SOWs in the SAP Fieldglass application allows organizations to:

- Monitor budgets (estimated spend against actual spend)
- Track worker headcount
- Track time submitted by workers
- Monitor the end dates of SOWs and workers
- Ensure change control processes are followed
- Automate invoicing

This user guide provides all of the SOW lifecycle activities from the initial SOW creation to the invoicing options available.

In this guide, the following topics are discussed:

- SOW Creation
- SOW Buyer Collaboration
- SOW Communications
- SOW Supplier Response
- Manage SOW Workers
- SOW Updates without a Revision
- SOW Revisions
- SOW Additional Actions
- SOW Invoicing

SOW CREATION

Objectives

To create an SOW, the following tasks are completed:

- Create Statement of Work
- Complete SOW Details
- Add SOW Clauses
- Add SOW Characteristics
- Add SOW Workers
- Complete SOW Review
- Submit an SOW
- Approve an SOW
- Copy an SOW

Create SOW

The SOW module may be accessed by creating a new SOW from the **Create** menu, from the home page under **My Statements of Work**, by creating an SOW from a **Decision Form or Wizard**, or by creating an SOW from an **RFX**. **In this document, we will be only creating SOW from the Create menu or My Statement of Work.**

To create a new SOW:

1. Click the **Create** menu and select **Statement of Work.**

   Or

   Click the **Create a new Statement of Work icon** on the home page.

   Users will first be prompted to select a **Classification** upon creating an SOW.

To complete the **Create Statement of Work** page:

1. Select the SOW mandatory details.

Field Name	Description
Ask the Expert	If enabled, this allows your buyer users to ask other buyer users questions related to statements of work. This is not available should the SOW be created from an SOW Bid.
Classification	The selected Classification will appear and the selection may be changed via edit. Only the Suppliers and SOW templates associated to the selected Classification will be available.
SOW Owner	The **SOW Owner** will default to the logged in user. If creating an SOW on behalf of another user, select the **SOW Owner** from the list. The **SOW Owner** list only contains users that have user role permissions to create SOWs. If an owner is selected, and that owner has different business unit associations than the creator, the creator can only associate the business units available to them. The owner selected will drive the SOW templates and existing SOWs visible under the **Create Statement of Work from** section. The owner will receive enabled SOW notifications during the lifecycle of

Field Name	Description
	the SOW.
SOW Billing Currency	The **SOW Billing Currency** will default to the logged in user's default currency. If creating an SOW for a different currency, select the **SOW Billing Currency** from the list. Only company-enabled currencies are available for selection. The currency selected will drive the SOW templates and existing SOWs visible under the **Create Statement of Work from** section.
Billable?	Under **Billable?**, select **Yes** if the SOW requires invoicing or **No** if the SOW will not require invoicing. If selected, only SOW templates that have the **Can be used to create non-billable Statement of Work** setting enabled will appear in the **Template List** under the **Select Source** section. **Note**: When selecting a non-billable statement of work template, the **Maximum Budget** on the SOW will be $0 and only **Clauses**, **Management Events**, and **SOW Workers** can be used. Refer to the Services Administration Guide for additional details.
Create SOW Bid?	The **Create SOW bid?** Field will default to **No.** To create an **SOW Bid**, choose **Yes** in the **Create SOW Bid?** field. This filters the list to only show templates that have the **Can be used to create SOW Bid** flag set to **Yes**, and creates a new **SOW Bid** when a template is selected. **Note**: The **Create SOW Bid?** field is hidden if the **Billable?** field is set to **No**.

2. Select Source

Card View:

The default upon first viewing to **Cards** view, which will display cards with frequently used template, supplier, and classification combinations. Users can select any of the cards to create an SOW with that template, supplier, and classification combination. Users may also decide to only search by a specific supplier, once selected, the card view will update to options available for only that supplier.

List View:

Users can switch to **List** view by clicking on the link in the upper right corner of the **Select Source** section. The most recently selected view will display for that user going forward. This view will then require the User to first select a supplier, which will then allow them to select any associated templates to both that supplier and the previously selected Classification.

More Information:

Within either view, users can access more information about an SOW template by clicking the **More info** link for a template. This opens a modal that provides template information in five tabs: **Usage**, **Details**, **Rules**, **Worker Rules**, and **Active SOWs**.

3. Under **Create Statement of Work from,** select **SOW Template** or **Master SOW**.

Field Name	Description
SOW Template	Select **SOW Template** to search for a template that matches the SOW that will be created. Templates are created for different SOW request types by Administrators, and templates help pre-define business rules. Templates can be customized by the creator depending on company configurations and template rules. The templates visible under the **Template List** are dependent on the classification, Owner, and currency selected. With **SOW Template** chosen, select a template from the **Template List**. If there is only one template available, the template name will appear under the **Template List** without requiring a radio button to select it. SOW templates that are established as **Master SOW** (MSOW) templates will appear in this list as well. Under the **Master SOW** column to the right, a **Yes** will be displayed if it is a MSOW. The purpose of the MSOW functionality is to give the buyer the ability to create a master contract with a supplier. The MSOW includes all the agreed upon contractual terms that will be in effect throughout each Child SOW (CSOW) created from the MSOW. MSOW templates can include Clauses, Management Events, Fees, and SOW Workers. This gives a buyer the ability to include all the negotiated rates and roles for a supplier on a MSOW. When a CSOW is created from the MSOW, it inherits information from the MSOW. An SOW created from a Master SOW Template can be used to create other SOWs that are children of the Master. SOWs created from templates that are not Master Templates can be copied if the **Copy SOW** company configuration is enabled. Please see the **Copy an SOW** section below for additional information.
Master SOW	Select the **Master SOW** (MSOW) source to search for MSOWs that were previously created from a Master SOW template. This source enables the user to copy an existing MSOW and create a Child SOW (CSOW). The CSOW will default values and rules established on the MSOW with the option to customize sections and update values as necessary. A CSOW created from a MSOW must be for the same supplier as the MSOW. With the **Master SOW** source chosen, select an existing MSOW from the **Statement of Work List**. The **Master SOW** source only appears under **Create Statement of Work from** when an SOW has been previously submitted from a Master SOW template with the supplier selected from the **Supplier List**.

	The **Statement of Work List** shows SOW requests that the owner has created in the past from an MSOW template. There are caveats to which MSOWs will be available to copy based on company configurations and the status of the MSOW: • If the setting **Statement of Work can be created for Master SOW before final approval** is enabled, the MSOW does not require final approval or acceptance of the MSOW by the supplier in order to create a CSOW from the MSOW. However, the MSOW must be reviewed by the supplier first if the supplier has a review step and then approved by the buyer if SOW approval is applicable before the MSOW is available for copying. • If the setting **Statement of Work can be created for Master SOW before final approval** is not enabled, the MSOW must be accepted by the supplier before the MSOW is available for copying. The final approval is completed by the supplier accepting the MSOW. If the Owner has not created any previous SOWs from a Master SOW, no SOWs will appear, and the source option **SOW Template** must be used instead. If the Owner has only created one SOW previously from a Master SOW, the MSOW name will appear under the **Statement of Work List** without requiring a radio button to select it.

4. Click **Continue**.

SOW Details

This section contains sections; **Statement of Work**, **Posting Information, Accounting, Cost Allocation, Rules, Attachments** sections.

Note: Some sections or fields may not appear on your page due to company configuration settings or SOW template settings. Please refer to the Services Administration Guide for additional details.

1. **Statement of Work**:

Field Name	Description
Name	Enter the **Name** of the SOW. The name will be reflective of the request type. If creating the SOW using an SOW template, the name will default from the template. If creating the SOW by copying a previous MSOW, the name from the prior MSOW will default. Name can be modified from the defaulted data.
Description	Enter a **Description** of the SOW. Description might contain details regarding the purpose of the SOW, the description of the project or program, a description of the services required, the amount budgeted, the type of contract, qualifications, etc. It is optional to fill in a description of less than 10,000 characters. If a description was pre-populated on the SOW template, it will default on the SOW. Description can be modified from the defaulted template data. Companies may wish to add descriptions that will help users determine the correct SOW template to select.

Field Name	Description
Start Date	Enter the **Start Date** for the project or work or use the calendar to select a date. **Note**: If workers will be associated to the SOW and will submit time sheets in Fieldglass, worker start dates must be on or after the SOW start date.
End Date	Enter the **End Date** for the project or work or use the calendar to select a date. To auto-calculate a fixed period of time after entering the **Start Date,** click **Enter job duration** to enter the length of time and select **Days**, **Weeks**, **Months**, or **Years** from the list. Click **Calculate end date** to have the system calculate the end date. **Note**: If workers will be associated to the SOW and will submit time sheets in Fieldglass, worker end dates must be on or before the SOW end date.
Defined By	Select one of the three **Defined By** options: **Buyer**, **Supplier**, or **Buyer and Supplier**. Defined By indicates who will enter the SOW characteristics. The default value pulls from the SOW template. The SOW creator has the option to change the selection unless the **Defined By locked on SOW** setting is enabled on the SOW template, and the radio buttons are read-only. If the SOW characteristics/clauses are defined by the **Buyer**, only the buyer will be able to add the terms and the supplier may not make any edits to the characteristics. If the SOW characteristics are defined by the **Supplier**, only the supplier will be able to define the terms. The supplier is only allowed to add details to characteristic types but will not be able to add or remove characteristics created by the buyer. If the SOW characteristics are defined by **Buyer and Supplier**, then both the buyer and supplier can define the terms. When submitting an SOW, the **Defined By** will drive the review and acceptance process by a supplier. Please see the section **Submit SOW** below for additional information.
Enforce Date Duration of Master Statement of Work when creating Child Statement of Work (Will only appear during creation of MSOW)	Select the **Enforce Date Duration of Master Statement of Work when creating Child Statement of Work** if future SOWs created from the Master SOW should align with the dates defined on the Master SOW. For example, the start date of the Child SOW must be on or after the start date of the Master SOW. The end date of the Child SOW must be on or before the end date of the Master SOW. Only when a Master SOW template is selected to create an SOW will this field appear on the SOW.

Field Name	Description
Child Statements of Work created from this Master Statement of Work (Will only appear during creation of MSOW)	Select one of the three **Child Statements of Work created from this Master Statement of Work** options: • Must use all Fees, Rates, and Roles defined on Master Statement of Work • Can select a subset of Fees and Roles, but not alter the Rates (new Rates can be added) • Can select a subset of Fees and Roles, alter the Rates and add new Fees and Roles When selecting **Must use all Fees, Rates, and Roles defined on Master Statement of Work**, the items established on the MSOW are automatically included on the CSOW and cannot be removed and additional characteristics cannot be added. When selecting **Can select a subset of Fees and Roles, but not alter the Rates (new Rates can be added)**, all the items needed are established on the MSOW. When creating the CSOW, the user can select a subset of the fees and roles established on the MSOW but cannot add other fees or select roles that were not on the MSOW. The rates established on the MSOW are automatically included on the CSOW and cannot be removed. However, other rates not on the MSOW can be added. When selecting **Can select a subset of Fees and Roles, alter the Rates, and add new Fees and Roles**, the items established on the MSOW can be included on the CSOW and other items can be added. Only when a Master SOW template is selected to create an SOW will this field appear on the SOW.

2. **Posting Information**:

Field Name	Description
Buyer Reference	Enter a **Buyer Reference**. A buyer reference provides another name or ID for the SOW and it offers an additional search criteria. The **Buyer Reference** is visible to the buyer and supplier. Buyer users with **Edit Reference** user role permissions are permitted to modify references. The supplier has the option to enter a **Supplier Reference** for their internal naming and search purposes on the SOW. The **Supplier Reference** is visible to the buyer and supplier.
Site	Select a **Site**. The site is where the project or work will be performed. If work will be done at more than one site, select the main site. The available sites depend on the following: the owner's associated sites, the creator's sites if the creator differs from the owner, and the supplier's association to the sites. When invoicing events and schedules, the supplier can modify the site for the work if the statement of work template rule, **Allow Supplier to specify Site on Line Item** is enabled. Please refer to the SOW

Field Name	Description
	Invoicing section later in this document for additional information.
Location	Select a **Location** if applicable. The location is a dependent on the site selected above and may default to the same **Site** if locations are not configured for the customer.
Business Unit	Select a **Business Unit**. The available business units depend on the following: the owner's associated business units, the creator's business units if the creator differs from the owner, and the business units associated to the SOW template. SOW approval workflows can be designed to use business units to define the approval routing.
Comments to Supplier	Enter **Comments to Supplier**.
Custom Fields	Custom fields will display after **Comments to Supplier** in the **Posting Information** section. Custom fields associated to the **Details** section appear first and then custom fields associated to the **Posting Information** section appear next. **Note:** If copying an SOW and the **Do Not Copy Value From Source SOW** setting is enabled on the custom field, then the value from that custom field is not copied to the SOW being created. Please see the Services Administration Guide for additional details.

3. **Accounting**:

Field Name	Description
Maximum Budget	For billable SOWs, enter a **Maximum Budget** value if a target budget amount is known. A $0 amount is permitted. Or select the **To Be Entered by Supplier** option to allow the supplier to define the budget. If an amount is entered by the buyer, including a zero amount, the supplier cannot modify the budget. To allow the supplier to define the budget, select **To Be Entered by Supplier**. Transactions such as time sheets, fees, and schedules generate invoices which deduct from the total budgeted amount. Miscellaneous invoices and credit/debit memos will also draw from the total budget amount. When considering the budget total value, the sum of the **Requested Amount**, which includes **Schedules** and **Events** defined on the **Characteristics** page, cannot exceed the **Maximum Budget**. For this reason, the **Maximum Budget** reappears on the **Characteristics** page of the SOW in case it needs to be modified to support the total requested amount. When defining the **Maximum Budget**, the **MSP Service Fee** may be applied to invoices if the customer is using the **Buyer Funded MSP Service Fee**. Please see the **MSP Service Fee %** below for additional information. Up to 14 numeric characters are supported in this field.
MSP Service Fee %	Enter the **MSP Service Fee %**. The MSP Supplier Administrator may

Field Name	Description
	default a value to apply to statements of work. An **MSP Service Fee %** is applicable for customers that have the company setting **Does Buyer Have MSP?** enabled. Administrators will designate services suppliers with an **MSP Service Fee** of either **Supplier-funded** or **Buyer-funded**. For customers using the **Supplier-funded** model, the MSP fee is subtracted from the bill-to-buyer amount to arrive at the pay-to-supplier amount. The MSP fee is part of the invoice created by the supplier but the supplier receives less than the amount on the invoice. For customers using the **Buyer-funded** model, the MSP fee is added to the pay-to-supplier amount to derive the bill-to-buyer amount for SOWs. The MSP fee is listed separately from the pay-to-supplier amount on the invoice. Please see the Services Administration Guide for additional details. If there are multiple MSP fee values per services supplier, the buyer can use the admin object, **Custom Lookup** to define the format of the MSP rates lookup table. Once the custom lookup is created, the Pick List Value upload file is used to upload the suppliers and MSP fee percentages. These fees will be pulled in at the time the SOW is distributed. **Note**: If an MSP supplier is selected for the SOW, the **MSP Service Fee %** is not applicable and the field is grayed out.
Custom Fields	Custom fields added under the SOW **Accounting** section will display after **MSP Service Fee %**. **Note:** If copying an SOW and the **Do Not Copy Value From Source SOW** setting is enabled on the custom field, then the value from that custom field is not copied to the SOW being created. If a default value is included on the custom field, it is applied to the SOW being created.

4. **Cost Allocation**:

Field Name	Description
Cost Center	Select the **Cost Center**. More than one cost center can be added. The available cost centers depend on the owner's associated cost centers. Cost Centers require an **Allocation %** if more than one cost center is selected. The **Allocation %** must total 100%. If more than one cost center is added, the **Primary Cost Center** must be selected. The **Allocation %** and **Primary Cost Center** values are used primarily for reporting purposes and do not limit charges to cost centers if spend incurred is above the allocation thresholds. If a cost center is not defaulted on the user profile, a list view is displayed and only the last 5 used cost centers will appear in the list. Use the **Add or remove cost centers** link to select a different cost

Field Name	Description
	center or add additional cost centers. If a cost center is defaulted on the user profile, the default value appears on the page but can be changed by using **Add or remove cost centers**. When using **Add or remove cost centers**, a **Statement of Work Cost Allocation** dialog box appears. Select **Used** or **Unused** to search for the cost center. After filtering, select the cost center check box(s) and click **Add Selected**. Ensure the **Selected Cost Centers** are correct and click **Update**.
Task Code	Select the **Task Code**. **Task Codes** are associated to cost centers, and the list will depend on the cost center(s) selected above. The **Task Code** field only appears when the company level configuration **Approver can specify Cost Center and Task Code on SOW Characteristics** is enabled. If this field is enabled, when a schedule, event, or fee is being approved, the approver must specify the cost center and task code for the characteristic. Please refer to the Services Administration Guide for additional details.
General Ledger	Select the **General Ledger**. **Note:** The **General Ledger** field only appears when the customer is using this functionality.

5. **Rules**:

   Note: Only company-level. SOW Type and Template rules enabled will appear. If the SOW is created from a Master SOW, more rules may be applicable for creating Child SOWs. Please refer to the Services Administration Guide for additional details on each rule. For rules that work with SOW Edits or Revisions, please refer to the section titled SOW Revisions below for additional information.

6. **Attachments**:

Field Name	Description
Attachment	Click **Add Attachment** to upload a document to the SOW. In the **Attach Document** dialog box, click **Choose File** to select the document and click **Attach** to add the document to the SOW. Attachments added to the SOW will display a **File Name**, a **Description**, a **Size (Compressed)**, and a **Visibility** selection. **Public** visibility indicates that all buyers and suppliers can view the attachment. **Private** indicates that only buyer users can view the attachment. **Restricted** indicates that only users with the **View Restricted Attachments** permission enabled can view the attachment. To remove an attachment, click **X** at the far right. The total maximum attachment size per SOW is 50 MB.

7. Click **Continue**.

Clauses
Clauses contain the legal terms for standard regulatory governance policies and conditions, and clauses outline the contractual language or agreement between a buyer and a supplier. Administrators can pre-define clauses in the **Clause Library** under **Services**. Clauses from the Clause Library can be associated to SOW Templates.

On the SOW template, Clauses may be set as **Mandatory**, **Optional**, or **Do Not Use**. If Administrators add clauses, the clauses will default on the SOW.

When Clauses are set as **Mandatory** on the SOW template, they are enforced as such on the created SOW.

If the **Optional** setting is enabled on the SOW template, the Clauses section can be omitted from the SOW. When creating the SOW, select the **Define Clauses** check box if clauses are required.

If the **Do Not Use** setting is enabled on the SOW template, Clauses are not available when creating SOWs from the selected template
If the SOW is created from a Master SOW template, the clauses defined on the Master SOW can be changed. However, if the SOW is a Child SOW of a Master SOW, the clauses defined on the Master SOW are locked on the Child SOW and cannot be changed. However, additional clauses may be added.

To add SOW **Clauses**:

1. Select the **Define Clauses** check box, if not preselected.

Define Clauses section:

If there are no predefined Clauses assigned, the user will see new fields for completion

Field Name	Description
Section	Enter a **Section** title for the clause section. A section can contain multiple categories and clauses, and multiple sections can be added.
Collaborator	Select a **Collaborator** to review the clause if applicable. The SOW owner will default as the collaborator. Only users with **Collaborate** user role permissions, business unit visibility, cost center visibility, and site visibility will be available to select. See the **SOW Buyer Collaboration** section in this document for more information.
Category	Enter a **Category** title for the clause. A category can have multiple clauses.
Read Only	If clause(s) have been defined by an Administrator on the SOW template, the clause may be set to **Read Only**.
Mandatory	If clause(s) have been defined by an Administrator on the SOW template, the clause may be set to **Mandatory**.
Add Clause	Click the **Add Clause** link to enter the clause text. The **Add Clause** dialog box will appear. Enter the text and click **Add**.
Add Category	Click the **Add Category** link to add a new **Category** to the clause section. A new category area will display below the previous category.
Add Section	Click the **Add Section** link to add a new **Section** to the **Clauses** page.
Clause Documents	Click **Add Document** under the **Clause Documents** section to upload a document to the SOW clause section. In the **Attach Document** dialog box, click **Choose File** to select the document and click **Attach** to add the document to the SOW. Attachments added to the SOW will display a **File Name**, a **Description**, a **Size (Compressed)**, and a **Public** flag. The public flag controls viewing by the supplier. Clauses added on the SOW template can include **Clause Documents**, which will default on the SOW if added. Documents provide clients an opportunity to add clause information or record all of the verbiage, since some agreements may be very lengthy. Click **View** to download the attachment. Click **Remove** to remove an attachment. The total maximum attachment size per SOW is 50 MB.
Copy Section	User may select from any Clauses the Administrator has made available via the Clause Library.

2. If the SOW has more than one clause category or section, the order in which they appear on the SOW can be ordered. Move the cursor over the clause **Category** or **Section** to enable the action buttons to **Remove**, **Expand/Collapse**, **Move Up**, or **Move Down**.

3. To enable the action buttons on the clause text, move the cursor over the text to enable the options to **Remove Clause**, **Re-order**, or **Edit Clause**.

   Note: If a clause is marked as **Mandatory**, the **Remove Clause** option is not available. If a clause is marked as **Read Only**, the **Edit Clause** option is not available.

4. Click **Continue**.

Characteristics
Characteristics define events, invoicing schedules, and payment components of the SOW. Radio buttons can be selected to create and view the necessary **Characteristic** Types: Events, Schedules, Fees, and/or Management Events. All characteristic types set to Mandatory or Optional on the underlying template are available as radio buttons.

A characteristic grid displays within the Characteristics step on SOW, SOW Response, SOW Revision, and SOW Revision Response documents. It is visible on Buyer, Buyer & Supplier, and Supplier defined SOWs.
The grid provides a simplified workflow, especially when working with a large number of line items. Some notes about editing the characteristics:

- The grid is read-only to the supplier if the underlying template is Defined By Buyer.
- Line items can be edited by the buyer and supplier if the underlying template is Defined By Buyer & Supplier.
- The grid is read-only to the buyer if the underlying template is Defined By Supplier. (The buyer can edit buyer-entered custom fields for line items added by the supplier.)

Some sections or fields may not appear on this page due to company configuration settings, SOW Type, or SOW template settings.

On the SOW template, Characteristics may be set as **Mandatory**, **Optional**, or **Do Not Use**.

When Characteristics are set as **Mandatory** on the SOW template, they are enforced as such on the created SOW.

If the **Optional** setting is enabled on the SOW template, the Characteristic type can be omitted from the SOW. When creating the SOW, select and add characteristics to the grid as required.

If the **Do Not Use** setting is enabled on the SOW template, Characteristics are not available when creating SOWs from the selected template.

It is important to note that characteristics may be unknown at the time of creation. If the SOW template rule **Allow addition of Management Events, Schedules, and Events after Statement of Work is created** is enabled, the SOW Creator can create the SOW without defining the Management Events, Schedules, and Events at the time of creation. Later, the characteristics can be added to the SOW without a revision. If the rule is not enabled on the SOW template, a revision is required to add these characteristics later. Please refer to the **SOW Updates without a Revision** section and **SOW Revision** section below as well as the Services Administration Guide for additional information.

Add SOW **Characteristics**:
1. Select the appropriate characteristic **Type** from the radio buttons at the top of the grid.

2. Click **Add** to create a new characteristic of the selected type, or click **Copy** to copy a characteristic of that type from the appropriate library.

SOW **Characteristics** page:

1. **Management Events**.

   Select this option if certain management events or deliverables are required during the course of the project but are not directly tied to a payment. Management events do not result in invoices. Examples may include a kick-off meeting, a mid-point review, or a status report from a supplier illustrating principal activities completed during a reporting period. Management events may be initiated by suppliers or buyers, and they display as work items on the actor's desktop at the appropriately scheduled times.

   Management events may be entered manually by clicking **Add Management Event**.

   Alternatively, if management events are pre-defined by an Administrator, they may be copied from the **Management Event Library** by clicking **Copy Management Events**. When the **Copy Management Event** dialog box appears, select the applicable events and click **Add Selected**. Please refer to the Services Administration Guide for additional details on the set up of the **Management Event Library**.

   Note: When the **Defined By** option for the SOW is set to **Supplier**, and **Management Events** are applicable to the SOW, the buyer does not define the events nor is the **Copy Management Events** available in this case.

Field Name	Description
Type	Under **Type**, select **Single** or **Recurring**. Single events require a **Due On** date. Recurring events require a **Frequency** and **Period** to be selected.
Actor	Under **Actor**, select **Supplier** or **Buyer**. The actor will be responsible for completing the work item at the scheduled time of the event.
Name	Enter a **Name** for the event.
Due On	If **Single** is selected under **Type**, enter a **Due On** date or use the calendar to pick a date for when the event is due by the actor. The date must fall between the start and end date of the SOW.
Frequency	If **Recurring** is selected under **Type**, enter a **Frequency** to define the rate of recurrence for when this event is due by the actor. Options for **Frequency** include: **Daily**, **Weekly**, **Twice Monthly**, **Monthly**, and **Yearly**. If a **Weekly** frequency is selected, the day of the week is required. If a **Twice Monthly** frequency is selected, the day of the month, either 1 or 16, is required. If a **Monthly** frequency is selected, either the start or end of the month must be selected. If a **Yearly** frequency is selected, either the start or end of the year must be selected.
Period	If **Recurring** is selected under **Type**, enter a **Period** and **To** date or use the calendar to pick a date when the recurrence will end.
Custom Fields	Custom fields added under the **SOW Management Event** module will display after the **Due On** or **Period** field.

Field Name	Description
	Line item custom fields display and can be populated during creation of an SOW. Line item custom fields display and can be populated during the creation of an SOW. Some custom fields may be mandatory to complete during creation of the SOW (depending on the custom field setting.) If the custom fields are populated during SOW creation, then that value is populated during approval of the line item. If the custom fields are not populated during SOW creation, the approver must enter a value when approving the line item.

2. **Schedules**

Select this option if payments will be made to the supplier according to a pre-set schedule set for the course of the project. Examples may include monthly payments, a final payment, or set fees to be paid on specific dates. The supplier can only submit invoices on these dates for agreed upon transactions.

Schedules may be entered manually by selecting **Add Schedule**. Alternatively, if schedules are pre-defined by an Administrator, they may be copied from the **Schedule Library** by clicking **Copy Schedules**. When the **Copy Schedule** dialog box appears, select the applicable schedules and click **Add Selected**. Please refer to the Services Administration Guide for additional details on the set up of the **Schedules Library**.

Note: When the **Defined By** option for the SOW is set to **Supplier**, the buyer will only indicate an option under **Can Supplier change amount prior to invoicing the Schedule?** The buyer does not define the schedules nor is the **Copy Schedules** available in this case.

Field Name	Description
Can Supplier change amount prior to invoicing the Schedule?	Select **No**, **Can Reduce**, or **Can Reduce/Increase**. The default value pulls from the SOW template, but the SOW creator has the option to change the selection. When the supplier invoices the customer on the scheduled date, the supplier is permitted to only invoice the amount specified without any adjustments, or invoice a reduced amount, or invoice any amount above or below the amount specified depending on the selection made here.
Type	Under **Type**, select **Single**, **Recurring**, **Single Fee**, or **Recurring Fee**. **Single** schedules require a **Due On** date and an **Amount**. **Recurring** schedules require a **Frequency**, a **Period**, and an **Amount**. A **Single Fee** schedule requires a **Due On** date, a **Rate**, and a **# of Units**. A **Recurring Fee** schedule requires a **Frequency**, a **Period**, a **Rate**, and a **# of Units**. Fee schedules may be created for arranged payments that will be made upon the completion of a specific milestone, the delivery of a certain work product, or the payment of consumables. Fee payments are calculated by multiplying the **Rate** by the **# of Units**.
Name	Enter a **Name** for the schedule.
Due On	If **Single** is selected under **Type**, enter a **Due On** date or use the calendar to pick a date for when the schedule can be invoiced.

Field Name	Description
Frequency	If **Recurring** is selected under **Type**, enter a **Frequency** to define the rate of recurrence for when the schedule can be invoiced. Options for **Frequency** include: **Daily**, **Weekly**, **Twice Monthly**, M**onthly**, and Yearly. If a **Weekly** frequency is selected, the day of the week is required. If a **Twice Monthly** frequency is selected, the day of the month, either 1 or 16, is required. If a **Monthly** frequency is selected, either the start or end of the month must be selected. If a **Yearly** frequency is selected, either the start or end of the year must be selected.
Period	If **Recurring** is selected under **Type**, enter a **Period** and **To** date or use the calendar to pick a date define the time period the schedule can be invoiced.
Capitalized?	Select **Yes** or **No** if the item should be capitalized. When an SOW is created, or edited, this flag will indicate if the item should be capitalized. Suppliers can set the flag when collaborating on an SOW or when adding a line item ad hoc. The Capitalized flag is for reporting purposes only.
Amount	If **Single** or **Recurring** is selected under **Type**, enter the **Amount** that can be invoiced. Up to 14 characters are supported.
Rate	If **Single Fee** or **Recurring Fee** is selected under **Type**, enter a **Rate** and select the Unit Type. **Units Types** are defined by Administrators under **Financial Data**.
# of Units	If **Single Fee** or **Recurring** Fee is selected under **Type**, enter the **# of Units**.
Custom Fields	Custom fields added under the **Schedules** module will display after the **Due On** or **Period** field. Line item custom fields display and can be populated during the creation of an SOW. Some custom fields may be mandatory to complete during creation of the SOW (depending on the custom field setting.) If the custom fields are populated during SOW creation, then that value is populated during approval of the line item. If the custom fields are not populated during SOW creation, the approver must enter a value when approving the line item.

3. **Events**

Select this option if payments will be made upon the completion of specific milestones or the delivery of certain work products. Events can be associated to pre-defined dates; however, the supplier can submit invoices before or after the dates established.

Events may be entered manually by selecting **Add Event**. Alternatively, if events are pre-defined by an Administrator, they may be copied from the **Event Library** by clicking **Copy Events**. When the **Copy Event** dialog box appears, select the applicable events and click **Add Selected**. Please refer to the Services Administration Guide for details on the set up of the **Event Library**.

Note: When the **Defined By** option for the SOW is set to **Supplier**, the buyer will only indicate an option under **Can Supplier change amount prior to invoicing the Event?** The buyer does not define the events nor is the **Copy From** available in this case.

Field Name	Description
Can Supplier change amount prior to invoicing the Event?	Select **No**, **Can Reduce**, or **Can Reduce/Increase**. The default value pulls from the SOW template, but the SOW creator has the option to change the selection. When the supplier invoices the customer on the event date, the supplier is permitted to only invoice the amount specified without any adjustments, or invoice a reduced amount, or invoice any amount above or below the amount specified depending on the selection made.
Name	Enter a **Name** for the event.
Description	Enter a **Description** for the event.
Due On	Enter the **Due** on date or use the calendar to select a date for when the event is expected to be completed. **Note:** The supplier can submit invoices before or after this date.
Amount	Enter the **Amount** to be paid to the supplier upon the completion of the event. Up to 14 characters are supported.
Capitalized?	Select **Yes** or **No** if the item should be capitalized. When an SOW is created or edited, this flag will indicate if the item should be capitalized. Suppliers can set the flag when collaborating on an SOW or when adding a line item ad hoc. The Capitalized flag is for reporting purposes only.
Custom Fields	Custom fields added under the **Event** module will display after the **Due On** or **Period** field. Line item custom fields display and can be populated during creation of an SOW. Line item custom fields display and can be populated during the creation of an SOW. Some custom fields may be mandatory to complete during creation of the SOW (depending on the custom field setting.) If the custom fields are populated during SOW creation, then that value is populated during approval of the line item. If the custom fields are not populated during SOW creation, the

Field Name	Description
	approver must enter a value when approving the line item.

4. **Fees**

Select this option if payments will be made for units delivered by the supplier at an agreed-upon rate. Fees are additional costs that the supplier will need to invoice as a part of the SOW. Examples may include a certain product to be delivered by a supplier or consumables used by the supplier.

Fees are manually entered by selecting **Add Fee** and they require **Unit Types** to be created by Administrators to support the rate per unit to be defined. Please refer to the Services Administrator Guide for additional Details.

Click **Add or Remove Fields** to add custom fields to the fees.

Note: When the **Defined By** option for the SOW is set to **Supplier**, the buyer does not define the fees.

Field Name	Description
Name	Enter a **Name** for the fee.
Description	Enter a **Description**.
Fee Rate Type	This will default to **Defined on Fees** because the Fee is being defined at the Fee level on the SOW.
Rate / Unit	Enter a numeric **Rate** and select a **Unit**. **Unit Types** are defined at the Administration level under **Financial Data**.
Product	The **Product** is defined on the Unit Type. Unit Types can be defined as a **Product** as opposed to a unit of time. **Unit Types** are defined at the Administration level under **Financial Data**.
Maximum Units	Enter the **Maximum Units** that will be produced.
Capitalized?	Select **Yes** or **No** if the item should be capitalized. When an SOW is created or edited, this flag will indicate if the item should be capitalized. Suppliers can set the flag when collaborating on an SOW or when adding a line item ad hoc. The Capitalized flag is for reporting purposes only.
Owner	Select a **Fee Owner**. When the user has permission, the field is a drop-down and a different owner can be selected for the Fee. The available owners display based on visibility. (Fee Owner defaults to the SOW Owner.)
Amount	The system will calculate the total amount of Fees (Rate/Unit multiplied by the Maximum Units) by selecting the **Calculate Fee Rate Amount** link.

Field Name	Description
Prevent Fee Submission	Select **Yes** or **No**. If **Prevent Fee Submission** is set to **Yes**, the Supplier will not be able to select this Fee Definition when submitting a Fee.

When creating a Child SOW (CSOW) from a Master SOW (MSOW), a **View Fees** link appears. Upon clicking, a **View Fees** dialog box displays the fees from the latest approved MSOW. If the setting **Must use all Fees, Rates, and Roles defined on Master Statement of Work** is enabled, fees are defined on the MSOW and the latest fee from the MSOW is viewable only.

5. **Accounting** section.

The **Maximum Budget** appears first on the **Details** page of the SOW and is available on the **Characteristics** page to modify as necessary.

Field Name	Description
Maximum Budget	For billable SOWs, enter a **Maximum Budget** value when a target budget amount is known. A $0 amount is permitted. Or, select the **To Be Entered by Supplier** option to allow the supplier to define the budget. **Note:** If an amount is entered by the buyer, including a zero amount, the supplier cannot modify the budget. To allow the supplier to define the budget, select **To Be Entered by Supplier**. Transactions such as time sheets, fees, and schedules generate invoices which deduct from the total budgeted amount. Miscellaneous invoices and credit/debit memos will also draw from the total budget amount. When considering the budget total value, the sum of the **Requested Amount**, which includes **Schedules** and **Events** defined on the **Characteristics** page, cannot exceed the **Maximum Budget**. For this reason, the **Maximum Budget** reappears on the **Characteristics** page of the SOW in case it needs to be modified to support the total requested amount. When defining the **Maximum Budget**, the **MSP Service Fee** may be applied to invoices if the customer is using the **Buyer Funded MSP Service Fee**. Please see the **MSP Service Fee %** on the **Details** page for additional information. Up to 14 numeric characters are supported in this field.

6. Click **Calculate Totals** to summarize the total cost resulting from the payment characteristics defined on the SOW.

7. Click **Continue** or you may go back and edit, delete or add any necessary characteristics

SOW Workers
SOW Workers can be added to the SOW to track headcount, submit time sheets, or submit expense sheets during the course of a project. Time sheets and expense sheets can be invoiced if the SOW is billable. On non-billable SOWs, workers can be tracked for headcount reporting.

The buyer defines the parameters and roles allowed for the SOW Workers. The supplier adds the SOW workers.

The **SOW Workers** page contains a **Define SOW Workers** section and an **Accounting** section. Some sections or fields may not appear on this page due to company configuration settings or SOW template settings. For example, the **Time Sheet** module and the **Expense Sheet** module must be enabled at the company level to allow for time sheet or expense sheet options on the SOW. Please refer to the Services Administration Guide for additional details.

On the SOW template, SOW Workers may be set as **Mandatory**, **Optional**, or **Do Not Use**. If Administrators add SOW Workers, the selection will default on the SOW.

When SOW Workers are set as **Mandatory** on the SOW template, they are enforced as such on the created SOW.

If the **Optional** setting is enabled on the SOW template, the SOW Workers section can be omitted from the SOW. When creating the SOW, select SOW Workers as required.

If the **Do Not Use** setting is enabled on the SOW template, SOW Workers are not available when creating SOWs from the selected template.

To add **SOW Workers**:

1. Select the **Define SOW Workers** check box.

   The SOW Workers page contains a **Define SOW Workers** sub-section, an **Expense Sheet Parameters** sub-section, a **Time Sheet Parameters** sub-section, a **Rules** sub-section, and a **Rates for Spend Calculations** sub-section.

   Note: Some sections or fields may not appear on this page due to company configuration settings or SOW template settings. Please refer to the Services Administration Guide for additional details. For example, **Expense Parameters** will only appear if the Expense module is enabled for the buyer. Also, the **Time Sheet Parameters** sub-section, **Rules** sub-section, and **Rates for Spend Calculations** sub-section does not appear until Yes is selected for **Track Time Sheets**.

2. **Define SOW Workers**:

Field Name	Description
Auto Activate SOW Worker	Select **Auto Activate SOW Worker** if workers will not require activation by the buyer.
Auto Register SOW Worker	Select **Auto Register SOW Worker** if workers will not be required to register in Fieldglass to log their time sheets or expense sheets.
Require Approvals on SOW Workers added during SOW Response	When a supplier submits a worker during collaboration or as part of their response, the application triggers approval on both the response and the SOW worker.

Field Name	Description
and SOW Revision Response	When this rule is enabled, the buyer can approve an SOW worker separately from the SOW Response when the worker is submitted as part of the response. If this rule is not enabled, SOW workers submitted as part of the response will not individually route through the SOW worker approval group.
SOW Worker Headcount Cap	Enter the maximum number of active SOW Workers allowed on the SOW. **Note**: The field is only available on buyer defined SOW templates. This field only appears when the setting **Enable SOW Headcount** cap is enabled on the SOW template. Warnings and conditional approval routing can be enforced when the headcount cap is exceeded on an SOW Work Order. Users with the SOW **Manage** user role permission will see an action of **Change Headcount Cap** on active SOWs with no revisions pending.
Track Time Sheets	Select **Track Time Sheets** if the Fieldglass time sheet functionality will be used. By selecting this option, the **Time Sheet Rules** section is expanded and the **Rates for Spend Calculations** section is displayed.
Estimated Expenses	Enter the **Estimated Expenses** per worker. This field is used to help determine the total estimated spend. Leaving this field blank or entering 0 is acceptable if additional spend is not required or unknown.

8. **Rules for SOW Workers**:

   Rules associated to the SOW workers via the company configuration and template, examples are items such as:

Field Name	Description
Track Time Sheets	Determines if timesheets will be generated for worker submittal.

4. **Expense Sheet Rules**:

Field Name	Description
Allowing Invoice from Approved Expense Sheets	Select **Allowing Invoice from Approved Expense Sheets** if invoices can be generated from approved expense sheets.
Give Workers access to all Expense Codes for the Cost Centers	Select **Give Workers access to all Expense Codes for the Cost Centers** if workers should have access to all of the expense codes associated to the cost centers assigned to them. **Note**: This rule will only display if the **Give Workers access to all Expense Codes for the Cost Centers** company configuration is enabled.

5. **Time Sheet Rules**:

Field Name	Description
Estimated Additional Spend	Enter the **Estimated Additional Spend** per worker. This field is used to help determine the Total Estimated Spend of the SOW. Leaving this field blank or entering 0 is acceptable if additional spend is not required or unknown.
Time Sheet Type	Select the **Time Sheet Type**. Time Sheet Type options may include: **Standard** or **Time In/Time Out** depending on the company configuration enabled by Administrators for types permitted. The default value from the company level configuration will be selected but may be changed by the SOW creator. If **Standard** time sheets are selected, total hours per day are tracked. If **Time In/Time Out** time sheets are selected, the time the worker started and ended their day is recorded along with any applicable breaks. Total hours per day are tracked.
Time Sheet Frequency	Select the **Time Sheet Frequency**. Time Sheet Frequency options may include: **Weekly**, **Biweekly**, **Semimonthly**, or **Monthly** depending on the company level configuration enabled by Administrators for frequencies permitted. The default value from the company configuration will be selected but may be changed by the SOW creator.
Hours per Day	Enter the standard **Hours per Day**.
Hours per Week	Enter the standard **Hours per Week**.
Allow Per Diem	Select this rule if per diem will be paid to workers as a daily allowance for living and traveling expenses.
Give workers access to all Task Codes for the cost centers	Select this rule to give workers access to all task codes that are associated to all of the cost centers assigned to the worker. **Note**: This rule will only display if the **Give Workers access to all Task Codes for the Cost Centers** company configuration is enabled.
Allow Worker to Submit Time Sheet	Select this rule to allow workers to submit time sheets through the User Interface (UI). This rule only applies when **Give workers access to all Task Codes for the Cost Centers** is enabled.
Issue warning if Hours per Day are exceeded on Time Sheet	Select this rule to issue a warning to a worker when submitting a time sheet that exceeds the hours per day.
Allow Time Capture in Hundredths of Hours	Select this rule if workers are permitted to submit time in hundredths of hours. For example, the worker could enter 8.15 hours of time if they worked 8 hours and 9 minutes.
Allow invoicing from approved Time Sheets	Select this rule if invoices may be generated from approved time sheets.
Allow Supplier Review on Time Sheet	Select this rule to direct worker time sheets to the worker's supplier upon submission. The supplier has the ability to edit or reject the

Field Name	Description
	worker's time sheet. Time sheets that are being reviewed by suppliers will show in a status of **Pending Review** to the buyer and worker. After the time sheet is submitted by the supplier, it will go through any company approval processes required on the buyer side. **Note**: Any changes by the supplier do not show up in the audit trail.

4. **Roles, Sites and Rates**

The **Roles, Sites and Rates** section appears when **Track Time Sheets** is enabled. At least one **SOW Worker Role** and **Site** must be selected before a rate can be added. All are required to submit the SOW.

To add a your **SOW Worker Roles**, **Sites** and **Rates**, select **Add Worker Roles and Rates** and then select your **SOW Worker Role** and **Site**. Next, click **Add or Remove Rates**. In the **Manage Rates** dialog box, search for rates and click **Add Selected**. Click **Update** when finished.

Note: Rates are set up by Administrators. Please see the Services Administration Guide for additional information.

Once a rate has been added, select the **Committed Spend** check box to include the rate in the estimated spend calculation. Multiple rates can be selected to create a blended rate for calculating the estimated spend per worker.
This field appears when **Allow invoicing from approved Time Sheets** is selected.

Note: When the SOW company rule **Supplier must enter % on the rates for SOW Workers** is enabled, the supplier will indicate the rate percentages and this allocation will be used to calculate the estimated spend per worker.

To add a Worker Role, Site, and Rate, select from the drop-down lists, and click **Add**. Multiple worker roles can be added. Click **X** to remove a worker role from the SOW.

Field Name	Description
SOW Worker Role	Select an **SOW Worker Role** from the list. Every worker on a SOW is associated with a role. Roles are used for reporting purposes and help ensure the worker's rate is accurate. Workers can only be assigned to roles that are associated with the SOW, and roles can be limited by the supplier selected. Roles can be added to an SOW after the SOW has been created. Worker roles can also be created for tracking equipment usage. Equipment can have rate cards, where the cost of using it varies by site, and it can have the equivalent of on and off boarding tasks, such as making sure licenses and permits are up to date. Time sheets can be used to track and bill for the time the equipment was in use. Expense sheets can be used to track mileage, parts, or repairs. On the other hand, equipment differs from human workers in that it should not be included in headcounts or in worker spend when computing the total against the cap. When viewing the list of SOW Worker Roles on an SOW, an **Equipment** column indicates roles that apply to equipment.

Field Name	Description
	When a worker is hired to a role with the equipment flag enabled: • The worker is auto-registered with the worker ID as the username • Security ID and Security Information Custom Fields are not populated and not required • Onboarding tasks that apply to SOW workers are generated. Those tasks where the actor is the worker are sent to the supplier • Time sheets are completed by the supplier • A workforce record is created for the worker that can later be used by the supplier to add the equipment to additional SOWs • The equipment workers are listed with the other SOW workers on the SOW Worker tab. The Equipment column can be used to sort the list of workers by type if needed • Amounts incurred on time sheets and expense sheets for equipment will not be counted against the Cap on worker spend
Site	Select a **Site** from the list. Rates can vary across sites and can be associated to Rate Grids to support different rates for different sites.
Rate Category/UOM	Based on the rate selected, the **Rate Category** will display. The Unit of Measure (UOM) may include **Hourly**, **Daily**, or **Monthly**. Select the **UOM** from the list. Rates must be created by Administrators with the UOM in order for the option to be added. Different UOMs can be assigned to workers on the same SOW.
Rate from Grid	If the company setting **Use Rate Grid for SOW Workers on Statement of Work** is enabled, rate grids may be set up by Administrators and associated to SOW workers. Rate grids allow buyers to create rate cards where rates are grouped together and can vary across sites and suppliers. This field appears when **Allow invoicing from approved Time Sheets** is selected.
Factor	The **Factor** will populate if a rate was created to be multiplied by a base rate to calculate the bill rate. For example, an overtime rate may have a factor of 1.5 which is calculated against the standard time base rate. This field appears when **Allow invoicing from approved Time Sheets** is selected.
Rate	Enter a **Rate** for the worker role. This field appears when **Allow invoicing from approved Time Sheets** is selected. **Note**: When an SOW Worker Role is associated to a rate grid, the SOW creator will not be permitted to enter a rate above the rate grid maximum rate.

5. **Accounting**.

   The **Maximum Budget** appears on the **Details** page and the **Characteristics** page of the SOW and is available on the **SOW Workers** page to modify as necessary.

Field Name	Description
Adjustment Group	The adjustment group to be used on the SOW and associated workers.
Maximum Budget	For billable SOWs, enter a **Maximum Budget** value when a target budget amount is known. A $0 amount is permitted. Or, select the **To be entered by Supplier** option to allow the supplier to define the budget. **Note:** If an amount is entered by the buyer, including a zero amount, the supplier cannot modify the budget. To allow the supplier to define the budget, select **To be entered by Supplier**. Transactions such as time sheets, fees, and schedules generate invoices which deduct from the total budgeted amount. Miscellaneous invoices and credit/debit memos will also draw from the total budget amount. When considering the budget total value, the sum of the **Requested Amount**, which includes **Schedules** and **Events** defined on the **Characteristics** page, cannot exceed the **Maximum Budget**. For this reason, the **Maximum Budget** reappears on the **Characteristics** page of the SOW in case it needs to be modified to support the total requested amount. When defining the **Maximum Budget**, the **MSP Service Fee** may also be applied to invoices if the customer is using the **Buyer Funded MSP Service Fee**. Please see the **MSP Service Fee %** on the **Details** page for additional information. Up to 14 numeric characters are supported in this field.
Cap on Worker Spend	When the SOW contains both SOW workers and any other payment characteristic, a **Cap on Worker Spend** field is enabled. The **Cap on Worker Spend** is entered by the user who defines the budget amount, either the buyer or the supplier, and appears depending on the selection under **Maximum Budget**. Select **Use Maximum Budget** or define a different amount to cap worker spend. The amount can be set up to the maximum budget on the SOW. The amount entered in the field controls the maximum amount of the SOW budget that can be consumed by time sheets, expense sheets, and miscellaneous invoices. This preserves the rest of the budget for line item spend.

6. Click **Continue**.

   Note: Click **Complete Later** to save a draft of the statement of work.

Review and Submit

The last step of the SOW creation process is to review the SOW in its entirety. The **Review** page offers the creator an opportunity to ensure the SOW is complete before proceeding to the next step in the SOW process.

To complete the SOW review:

7. Ensure each section from the preceding steps is correct. If modifications are required, click **Make Changes** to right of the section needing changes.
8. At the bottom of the Review page, click **Submit**. Or, click **Complete Later** to save the SOW in **Draft** status and modify it prior to submitting it.
9. Select an option on the **Submit Statement of Work** dialog box, and click **Submit**. Please refer to the **Submit an SOW** section below for additional details.

   Note: Once you have passed the **Details** page of the **Create Statement of Work** process, the SOW will be auto-drafted. Click **Cancel** to be taken to the Draft SOW.

Submit an SOW

An SOW owner may submit an SOW from the **Review** page during the initial creation of the SOW or on SOWs in **Draft** or **Pending Buyer Review** status.

To submit an SOW:

1. Click the **View** menu and select **Statement of Work**
2. Click the **ID** link of the desired SOW in a Pending Buyer Review status.
3. Click **Edit**.
4. Review the pages of the SOW and make modifications if applicable.
5. On the **Review and Submit** page of the SOW, click **Submit**.
6. On the **Submit Statement of Work** dialog box, based on company configurations or the current status of the SOW, the designated next step will appear at the top: **Submit for Approval**, **Submit for Supplier Review**, or **Submit to Collaborator for Review**. Choose **Submit**.

Field Name	Description
Submit For Approval	**Submit for Approval** applies if an SOW approval workflow is configured for the customer, and the approval option is enabled. When initially submitting the SOW, the SOW may need to be reviewed by the supplier prior to the SOW routing for approval. **Submit for Supplier Review** will display in this case. This action will be only be displayed after the supplier has reviewed the SOW. If **Defined By** is set to **Buyer**, the supplier does not review the SOW, and this option is displayed. Please proceed to the following topic, **Approve an SOW**, for additional information.
Submit for Supplier Review	**Submit for Supplier Review** applies if the SOW is ready to route to the supplier to review and negotiate the terms of the SOW. The **Submit for Supplier Review** action is only applicable when the **Defined By** is set to **Supplier** or **Buyer and Supplier**. A review of the SOW is not necessary when the terms are **Buyer** defined. **Submit for Approval** will display in this case.

Field Name	Description
Submit to Collaborator for Review	**Submit to Collaborator for Review** applies if Clause sections need to be reviewed internally by collaborators prior to releasing the SOW to the supplier. When a collaborator is assigned on a clause section(s), the SOW will be routed to **Submit for Collaborator Review**. The other submittal routing only becomes applicable after the clauses have been reviewed. Please proceed to the following topic, **SOW Buyer Collaboration**, for additional information.

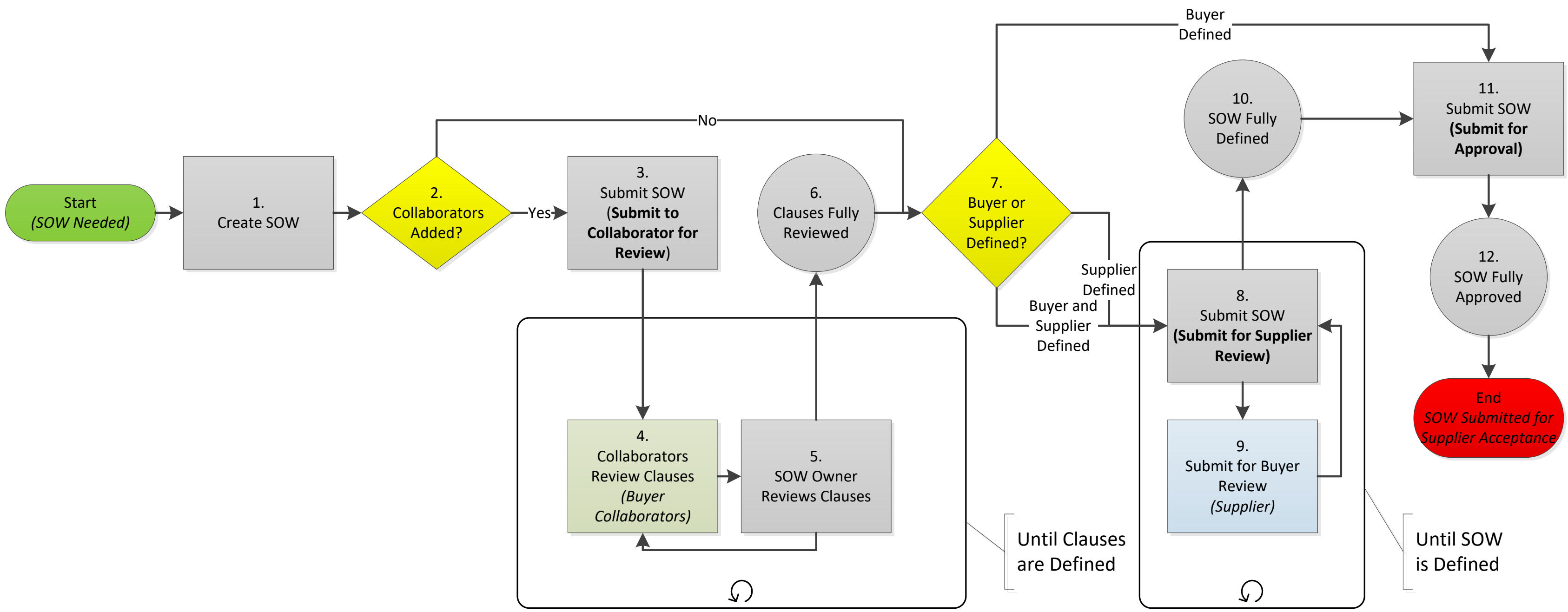
7. Click **Submit**.

Withdraw an SOW
When an SOW or SOW revision is in **Pending Approval or Approval Paused** status, buyer users with the withdraw the SOW from the approval process. When the withdraw action is performed, the SOW goes back to the status it was in prior to being in Pending Approval or Approval Paused status.

To submit an SOW:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **More Actions**, then click **Withdraw**.
4. Select the appropriate **Reason**. Reasons are created by the buyer Administrator.
5. Enter Comments as necessary and click **Withdraw**.

Below is a high-level process illustration of the possible **Submit Statement of Work** options (**Submit for Approval**, **Submit for Supplier Review**, or **Submit to Collaborator for Review**):



Approve an SOW

An SOW may require approval depending on company workflow design for SOW approval. In the event there is an approval process, the approver may also have an **Editor** permission. An **Edit** button appears in addition to the **Approve** and **Reject** button for approvers with an **Editor** permission.

SOW approval is typically required prior to the SOW being sent to the supplier. However, there is an option to permit SOW visibility to suppliers prior to approval. The **Allow supplier to view SOW and SOW Revisions in Pending Approval** permission is granted at the supplier company level by Administrators. Please refer to the Services Administration Guide for additional details.

To approve an SOW:

1. Click **Work Items** and select **Approve** under **Statement of Work**. Alternatively, click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **Edit** if you have **Editor** permissions and desire to modify the SOW.

   Note: Editors have the ability to make changes to clauses on the SOW. If the Editor adds or modifies clauses, the Editor is enforced as the Collaborator. If the Editor approves the SOW, the clauses will be systematically marked as **Reviewed**.
4. Click **Approve**.

   The SOW status will remain in a **Pending Approval** status or change to a **Pending Response** status depending on the customer SOW workflow design.

Copy an SOW

The Copy Statement of Work feature allows buyers to create a new SOW by copying an existing one. A new SOW start date and SOW Owner is required to initiate this action, and then all other information from the existing SOW is copied, including all active workers, associated activity items, and line items. The copied SOW can then be edited as needed and submitted as a new SOW.

The **Copy Statement of Work** company configuration must be enabled to use this feature. This feature cannot be enabled unless the **Suppress SAP Fieldglass Activities and Offboarding Activities and auto-register when transferring Worker to another SOW** company configuration is also enabled. Please refer to the Services Administration Guide for additional information.

When worker records are created from copying an SOW, the worker's supervisor can be retained from the original worker record, or the worker can inherit the new SOW owner as the supervisor. Please refer to the Services Administration Guide for additional information.

To copy a statement of work from a previously created SOW:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW that will be used to create the new SOW.

   Note: The source SOW must be in **Approved** status without any pending revisions and the terms cannot be defined by the supplier in order to be permitted to copy the SOW.

3. Click **Copy Statement of Work** from the **Actions** list.
4. Complete the required fields in the **Copy Statement of Work** dialog box.

Field Name	Description
Maintain SOW Duration	If **Yes** is selected, the **End Date** is automatically calculated from the **Start Date** and duration. Otherwise, an **End Date** will need to be entered.
Start Date	**Start Date** of the new SOW.
End Date	**End Date** of the new SOW, if duration is not maintained.
Copy SOW Workers	**Yes** or **No** to copy all active SOW workers into the new SOW.
Owner and Supervisor for copied SOW Workers	Select **Existing Owner and Supervisor** or **New SOW Owner**
Owner for new SOW	Select the **New SOW Owner** for the SOW. The SOW Owner defaults to the original Owner, but may be changed. The users who display in the list are users with visibility to the original SOW's business unit, cost center, and site. The new Owner is also applied to management events, schedules, events and workers.

5. Click **Copy Statement of Work**.
6. Click **Edit Statement of Work** in the **Copy Statement of Work** dialog box.

   Note: The new SOW is created, and the SOW ID and status display in the dialog box. If the source SOW is **Buyer** defined, the status of the new SOW will be **Draft**. If the source SOW is **Buyer and Supplier** defined, the status of the new SOW will be **Pending Buyer Review**.

7. Review and edit the SOW pages (Details, Clauses, Characteristics, SOW Workers, and Review) as described in the preceding sections.

   Note: When a new SOW is created as a result of the copy process, the field values are populated based on various factors. It is important to review the copied SOW and update all values that do not apply to the new SOW. The types of changes that can be made to the copied SOW when it is in **Draft** status or **Pending Buyer Review** status are part of the standard SOW edit process. As part of this process, some fields may not be editable during the review. A revision may be required to perform certain changes to the SOW.

   When copying workers, information from existing worker records is copied to new worker records and **Draft** work orders are created.

   The table below describes how the values on a copied SOW are derived or calculated and the changes that can be made during the review and edit process.

Field Name	Description
SOW Setup Information	The user who initiates the copy process is the **Owner** of the new SOW. This value cannot be changed during the review/edit process. Standard SOW functionality that allows edits to the SOW setup can be used to change the Owner after the new SOW is approved. **Currency**, **Billable?**, and **Classification** are copied from the source

Field Name	Description
	SOW. These values cannot be edited during the review/edit process.
SOW Details	**Buyer Reference**, **Name**, and **Description** are copied from the source SOW and can be changed during the review/edit process. The **Start Date** was entered when the copy process was initiated. Update the **Start Date** if desired. Changing the start date will impact other areas of the SOW. Be sure to make all necessary updates if a change is made to the start date on the copied SOW. **Note**: If the start date is changed on the new SOW, it will not automatically update the generated work orders. The supplier will need to update the work orders with the correct start date. The **End Date** was calculated based on the start date entered. Enter a different end date if desired. **Note**: If the end date is changed on the new SOW, it will not automatically update the generated work orders. The supplier will need to update the work orders with the correct end date. **Defined By** – copied from the source SOW. This value cannot be changed during the review/edit process. Update the **Site** and/or **Location**, if desired. Changes to the site and location are not automatically updated on the associated work orders. The supplier will need to edit the work order with the correct site/location Update the **Business Unit**, if desired. Changes to the business unit are automatically updated on the associated work orders when the SOW status changes to **Response Pending Approval** or **Approved**. Update or enter the **Custom Field** values, if the copied values are not valid for the new SOW. **Note**: Custom fields that are flagged **Do Not Copy Value** are blank on the new SOW. Mandatory custom field values that did not copy from the source SOW must be entered. Update the **Maximum Budget**, if desired. **Note**: If the maximum budget is changed, it cannot be less than the total of the schedules, events, and fees, and the Cap on Worker Spend cannot exceed the Maximum budget. Update the **Cost Center**, if desired. Cost centers can be removed or added. Update the **Allocation %** and the **Primary Cost Center** as needed. The **Auto-Respond** option cannot be changed on the new SOW. If Auto-Respond is enabled, work order start and end dates must fall within the start and end dates of the new SOW. When editing SOW start and end dates, the following should be considered: • The SOW start date must be earlier than the earliest work order start date. If the start date is changed to a later date, an error message will display. • The SOW end date must be later than the latest work order end date. If the end date is changed to a later date, an error message will display.

Field Name	Description
	The Auto-Respond option can be disabled on the source SOW before the copy process is initiated. Add or remove **Attachments**, if desired.
Clauses	Copied from the source SOW. Clauses on the new SOW will have a status of **Reviewed**. Update, remove, or add new clauses, if desired. **Note**: Clauses that are marked read only and/or mandatory cannot be removed. Clause attachments can be removed during the review/edit process and new attachments can be added.
Characteristics	The Characteristics are copied from the source SOW. Characteristics can be changed or removed during the edit process, and new characteristics can be added. **Schedules -** The **Due On** date is calculated based on the new SOW start date. If the start date was changed during the edit process, the due on date is not recalculated. Update the due dates as needed. The due on date must fall between the new SOW start and end dates. **Events** - The **Date** was calculated based on the new SOW start date. If the start date was changed during the edit process, the due date is not recalculated. Update the due dates as needed The due date must fall between the new SOW start and end dates. **Fees -** The **Maximum Units** was copied from the source SOW. Update as needed. The units used count was reset to zero during the copy process.
SOW Worker Setup	Update the **SOW Worker Setup**, if desired. **Note**: The **Track Time Sheets** option was copied from the source SOW and cannot be changed on the new SOW. **Note**: The **Auto-Register SOW Worker** option was copied from the source SOW. This option only applies to new workers added to the SOW. Active workers copied from the source SOW are auto-registered even if this option is not selected. Update, remove, or add new **Rates**, if desired. **Note**: Changes made to rates are not automatically updated on the existing associated work orders. The supplier will need to update the work orders with the correct roles. Update, remove, or add new **Roles**, if desired. Roles were copied from the source SOW and can only be removed if workers are not assigned to them. **Note**: Changes made to roles are not automatically updated on the existing associated work orders. The supplier will need to update the work orders with the correct roles.

8. Click **Submit**.

Renew an SOW

The Renew Statement of Work feature allows buyers to copy an existing SOW and submit and SOW without making any edits to characteristics, updating only the dates of the new SOW. No information is required to create the new SOW; selecting **Renew Statement of Work** will complete the process. The new SOW will retain the fields and characteristics from the original SOW. The new start date will be set to the day after the original SOW end date, the end date will be calculated based on the new start date and original SOW duration, and the Owner will be set to the same Owner as the original SOW.

The **Renew Statement of Work** company configuration must be enabled to use this feature. This feature cannot be enabled unless the **Suppress Fieldglass onboarding and offboarding tasks and auto-register when transferring worker to another SOW** company configuration is also enabled. Please refer to the Services Administration Guide for additional information.

To renew a statement of work:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW that will be used to create the new SOW.

   Note: The source SOW must be in **Approved** status without any pending revisions and the terms cannot be defined by the supplier in order to be permitted to renew the SOW.
3. Click **Renew Statement of Work** from the **Actions** list.

SOW BUYER COLLABORATION

Introduction

SOW buyer collaboration facilitates internal review of SOW clause sections. By default, clause sections are assigned to the SOW owner. It is optional for customers to assign clauses to Collaborators for review.
When clauses are added to an SOW, the SOW Owner can assign clause sections to users with the SOW **Collaborate** user role permission. Only users with the SOW business unit visibility, cost center visibility, and site visibility are available to select as Collaborators. A Collaborator can be initially selected when defining clauses on the **Clauses** page of the SOW. Please refer to the preceding topic, **Add SOW Clauses** for additional information.

Once a Collaborator has been assigned, the SOW Owner may choose to reassign the section to another Collaborator. In addition, the Collaborator assigned to a clause on the SOW can reassign a clause to another Collaborator, provided that person has similar user role permissions and SOW visibility.

The Collaborator can add, modify, reorder, and remove **Categories** and **Questions** from their assigned **Section** provided it has not been marked **Read-only**. Read-only sections can be assigned to Collaborators; however they will only be able to mark the section as reviewed. No changes will be allowed.

After the Collaborator marks the section **Reviewed**, the status of the **Section** changes to **Pending Owner Review** and a notification is sent to the SOW owner. After all **Sections** are marked **Reviewed** by their assigned collaborator(s), a final notification will be sent to the SOW Owner indicating that all assigned sections are complete. At this point, the SOW is ready for approval or supplier review.

The SOW Owner may choose to submit the SOW after collaboration is complete and clause sections are marked as **Reviewed**.

Objectives
To use the collaboration feature, the following tasks must be completed:

- Reassign Section to Collaborator
- Compare a Section to a Previous Version
- Review a Section

Reassign Section to Collaborator
An SOW section Collaborator or an SOW Owner may reassign a section to a Collaborator. SOW Owners can reassign clauses when the section is in **Pending Collaborator Review** status.
To reassign a clause section on the SOW:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click the **Clauses** tab.
4. Under the **Section** to be reassigned to another collaborator, click **Reassign**.
5. On the **Reassign Section** dialog box, select a **Collaborator/Evaluator** from the list.
6. Enter **Comments**.
7. Click **Reassign**.

Compare a Section to a Previous Version

If previous versions of the clause section exist, a **Compare To** option displays on the section. SOW Owners and Collaborators are able to view previous versions and change history.

To compare a section:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click the **Clauses** tab.
4. Under the **Section** to be reviewed, select a previous version of the section from the **Compare To:** list.

   Note: The differences between the two versions being compared will appear as follows:

   - Deleted information shows in red with a strike-out
   - Added information shows in green

Review a Section

Assigned SOW Collaborators can add, modify, reorder, and remove categories and clauses from any section that has been assigned to them. After the Collaborator has finished their review and modifications on the assigned section, the Collaborator must mark the section as **Reviewed** to let the SOW Owner know that they finished their assignment. Alternatively, the Collaborator can reassign the section to another Collaborator for further modifications. See the preceding topic Reassign Section to Collaborator for information on reassigning sections to be reviewed by other Collaborators.

After the Collaborator marks the section as **Reviewed**, the status of the section changes to **Pending Owner Review** and the SOW Owner will then either submit the SOW for approval or supplier review or reassign a section for further collaboration.

To review an SOW clause section:

1. From the **Work Items** menu, click the **Review** link under **SOW Section**. If selecting the SOW from **Work Items**, the **Section** to be reviewed is displayed upon opening. Alternatively, click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click the **Clauses** tab.
4. For an assigned clause section, the Collaborator may modify the section by clicking **Edit**.

   Please refer to the former topic, Add SOW Clauses for additional details.
5. For an assigned clause section, click **Reviewed**.

   Note: The status of the SOW section changes to **Pending Owner Review**. Once all collaborators mark assigned sections **Reviewed**, the SOW owner is permitted to **Edit** the SOW.

SOW COMMUNICATIONS

Introduction
SOW communications serve the purpose of facilitating messages either between internal buyer users or between the buyer and supplier for answering questions and informing users of their responsibilities on the SOW.

Objectives
To communicate on an SOW, the following activities may occur:

- Communicate via Ask An Expert
- Communicate via Chat

Communicate via Ask an Expert
The **Ask an Expert** feature allows SOW creators the ability to ask for assistance from an SOW expert when creating an SOW. This is an internal communication between buyer users where the SOW Creator submits a question and it is sent to the designated Expert's Message Center. The user does not need to know who to contact; the system automatically directs their question to the appropriate user(s) who have the user flag **User will receive Ask an Expert (Services) questions** enabled. The

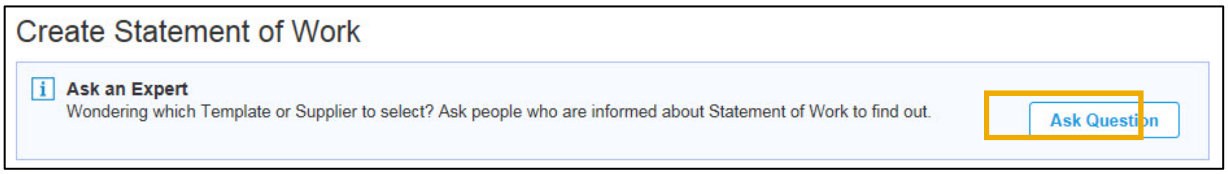
question is e-mailed if the message is enabled in Messaging and the recipient's Messaging Preferences are set to receive Questions via e-mail.

The Expert will answer the question, and the reply is sent to the person who asked the question in their Message Center. The reply is e-mailed if the message is enabled in Messaging and the recipient's Messaging Preferences are set to receive Questions via e-mail.

This feature is only available if the company configuration, **Enable Ask an Expert (Services)** is enabled. A user must be also be configured with the **User will receive Ask an Expert (Services) questions** selected on their user profile to receive questions.

To create an **Ask an Expert** question:

1. Click the **Create** menu and select **Statement of Work.**
2. Under **Ask an Expert**, click **Ask Question**.



3. In the **Ask an Expert** dialog box, type the question and click **Submit Question**.
4. Once the question is submitted, it will go to the designated expert. A success message is displayed and additional questions can be submitted.
5. The expert user will view the message in their **Message Center** and may also receive an associated email.
6. The expert user can reply to the question via Message Center and click **Send**, or can reply directly to the email notification if received.
7. The reply message is sent to the **Message Center** of the person who submitted the question and may also be sent via email depending on the user's email preferences.

Communicate via Chat

The **Chat** feature is a messaging board that enables buyer users to communicate information internally among users associated with the SOW or externally to the supplier that has received the SOW. For example, if there is a need to update a supplier, the Chat feature can be used to communicate a response quickly.

Only users with the **Chat Buyer (Services)** and **Chat Buyer Supplier (Services)** user role permissions will be authorized to communicate using the Chat feature on an SOW. A user may have **View**, **Submit**, or **Manage Other's Messages** permissions. Please refer to the Services Administration Guide for additional information.

When communicating internally using the Buyer chat, only company users that have visibility to the SOW will be able to view the chat message. When communicating with the supplier using the Supplier chat, the message is visible to those company users with visibility to the SOW and to the supplier on the SOW. System notifications can be delivered to the SOW owner, creator, and forum participants.

To create a chat message:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click the **Chats** (icon in the upper right corner.
4. To send a message to the buyer only, click the tab that displays **My Company**. Enter the message and click **Save**.
5. To send a message to the buyer and to the supplier who has access to the SOW, click the **Supplier** tab. Enter the message and click **Save**.

   When a Chat message is added, the buyer or supplier will be notified and can respond as appropriate. The Chats icon displays an arrow on the left corner () to indicate there are messages.

SOW SUPPLIER RESPONSE

Introduction

Suppliers will respond to the submitted SOW when terms are **Supplier** defined or **Buyer and Supplier** defined. During the review process, the supplier may negotiate the terms of the SOW with the buyer. After negotiations are complete by the buyer and supplier, suppliers will accept the terms of the SOW. For SOWs that will track workers, suppliers may submit the workers before the SOW has been approved, during the response, or after the SOW has been accepted.

In some cases, suppliers do not need to respond to an SOW when **Auto Respond** and/or **Skip Collaboration?** is enabled. For example, when an SOW is approved, the supplier response is automatically generated and the SOW goes into the next appropriate status such as **Approved** or **Response Pending Approval**. This configuration is enabled at the **SOW Type** level, and the SOW creator will control the setting when creating the SOW. Please refer to the **Complete SOW Details** section above for additional information.

Note: This section of this guide is designed as an overview to illustrate what a supplier will complete when responding or accepting an SOW for buyer users to understand the supplier process. This section does not provide end-to-end instructions for a supplier user. Please refer to the SAP Fieldglass Supplier Transactional Guide for additional information on supplier activities.

Objectives

To respond to an SOW, the supplier may perform the following activities:

- Supplier Reviews and Responds to an SOW
- Supplier Accepts an SOW
- Supplier Adds an SOW Worker
- Supplier Adds an Existing Worker
- Supplier Adds an Active Worker

Supplier Reviews and Responds to an SOW

Reviewing an SOW allows buyers and suppliers to negotiate the terms of the SOW.

Suppliers will only see the applicable payment characteristics and SOW Workers section if they are defined on the SOW created by the buyer.

When the terms are **Buyer and Supplier** defined, the buyer defines all of the payment characteristics but the supplier is permitted to modify them.
When the terms are **Supplier** defined, the buyer enables the payment characteristics that apply and the supplier defines the terms.

Suppliers will perform the following when responding to an SOW:

1. From the **Work Items** menu, click the **Review** link under **Statement of Work**. Alternatively, click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW in a **Pending Supplier Review** status.
3. Click **Respond**.
4. Complete the **Details** page of the SOW Response.

The following fields on the **Details** page are editable by a supplier:

Field Name	Description
Supplier Reference	Enter a **Supplier Reference.** A supplier reference provides another name or ID for the SOW and it offers an additional search criteria. The **Supplier Reference** is visible to the buyer. Additionally, if the buyer has added a **Buyer Reference**, it is visible to the supplier.
Primary Contact Person	Select the **Primary Contact Person** from the list. The list is populated with supplier users authorized to view the SOW.
Comments	Enter **Comments** for the buyer to review.
Maximum Budget	Enter the **Maximum Budget**. This field is only editable when the buyer has requested for the supplier to define the budget. If the buyer has defined the budget, this field will be read-only with the maximum budget displayed. This field does not display when the SOW in non-billable.
Attachments	Click **Add Attachments** to upload a document to the SOW. In the **Attach Document** dialog box, click **Choose File** to select the document and click **Attach** to add the document to the SOW. Attachments added to the SOW will display a **File Name**, a **Description**, a **Size (Compressed)**, and a **Public** flag. The public flag controls viewing by the buyer. To download and view an attachment, click **View**. To remove an attachment, click **Remove**. The total maximum attachment size per SOW is 50 MB.

5. Click **Continue**.
6. Complete the **Clauses** page, if applicable, of the SOW response.

   If the SOW is defined by both **Buyer and Supplier**, the supplier will have the option to edit, add, and remove clauses. At least one clause must be defined. Please refer to the Add SOW Clauses section above for additional information on how to manage clauses.

   If necessary, the supplier may select a **Collaborator** in each section. Collaborators are additional reviewers or editors for the statement of work.

   If the SOW is defined by the **Supplier**, the supplier will not have an option to edit, add, or remove clauses which were added by the buyer.
7. Click **Continue**
8. Complete the **Characteristics** page of the SOW response.

   If the SOW is defined by the **Buyer and Supplier**, the supplier will see each characteristic that has been selected by the buyer along with any defined terms. The buyer is not required to define any of the terms under **Define Management Events**, **Define Schedules**, **Define Events**, or **Define Fees** and can simply select which characteristics are applicable and request the supplier to define the terms. The supplier may add, update, or remove terms for each applicable characteristic. The supplier cannot remove a characteristic section if the buyer has selected it on the SOW. The review process can go back and forth between a buyer and supplier to negotiate terms as applicable.

If the SOW is defined by the **Supplier**, the supplier will see each characteristic allowed by the buyer. The buyer does not enter any of the terms under **Define Management Events**, **Define Schedules**, **Define Events**, or **Define Fees**. Rather, the supplier must enter and select the terms for each applicable characteristic. The supplier cannot remove a characteristic section if the buyer has selected it on the SOW.

Please refer to the Add SOW Characteristics section for additional information on how to define and manage characteristics.

9. Click **Continue**

10. Complete the **SOW Workers** page of the SOW response.

    Suppliers are always responsible for adding the SOW workers; the buyer does not perform this activity. Suppliers have the option to **Add SOW Worker** or **Submit an existing SOW Worker**. If SOW workers are applicable to the SOW, the supplier can add the workers when initially responding to the SOW or after the response has been submitted to the buyer.

    In the event the buyer permits suppliers to submit workers to unconfirmed SOWs, SOW workers can be added while the SOW is in the status of **Pending Buyer Review**, **Pending Approval**, or **Response Pending Approval**. The SOW template rule **Allow Addition of Workers During Approval** must be enabled to allow suppliers to submit SOW workers on unconfirmed SOWs.

    Note: Workers will not be able to register until the SOW is approved.

    Note: When adding an SOW Worker, the **Add SOW Worker** dialog box fields must be completed. Please refer to the Supplier Adds an SOW Worker section below for additional information.

11. Click **Continue**.

12. Complete the **Review** page of the SOW response.

13. Click **Submit**.

    Add any appropriate comments before submitting the response.

14. Click **Submit**.

Supplier Accepts an SOW

When an SOW has been finalized and the terms reviewed by the supplier and buyer, the SOW must be accepted by the supplier.

When the SOW is defined by the **Buyer**, the supplier does not negotiate terms and will only have permission to **Accept** or **Decline** an SOW. When terms are defined by the **Supplier** or by the **Buyer and Supplier**, the supplier will review and respond to an SOW prior to accepting the SOW. Please see the preceding section, Supplier Reviews and Responds to an SOW for additional details.

Suppliers will perform the following when accepting an SOW:

1. From the **Work Items** menu, click the **Accept** link under **Statement of Work**. Alternatively, click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **Accept**.

   Note: If the supplier choses to **Decline**, an SOW **Decline** reason must be selected. Declined SOWs have a status of **Declined** and require the buyer to **Resubmit** the SOW with modifications as required. The supplier Administrator configures SOW Decline reasons.

4. Complete the **Details** page of the SOW Response.

   The following fields on the **Details** page are editable by a supplier:

Field Name	Description
Supplier Reference	Enter a **Supplier Reference**. A supplier reference provides another name or ID for the SOW and it offers an additional search criteria. The **Supplier Reference** is visible to the buyer. Additionally, if the buyer has added a **Buyer Reference**, it is visible to the supplier.
Primary Contact Person	Select the **Primary Contact Person** from the list. The list is populated with supplier users authorized to view the SOW.
Comments	Enter **Comments** for the buyer to review.
Auto Invoice all Characteristics, Time Sheets and Expense Sheets	Select **Yes** if all characteristics and worker time sheets or expense sheets should be auto-invoiced upon approval.
Maximum Budget	Enter the **Maximum Budget**. This field is only editable when the buyer has requested for the supplier to define the budget. If the buyer has defined the budget, this field will be read-only with the maximum budget displayed. Note: If company configuration setting **Suppress Budget Amount from Suppliers is enabled**, supplier will not be able to view Maximum Budget.

Field Name	Description
Attachments	Click **Manage** on the right of the **Attachment** section to upload a document to the SOW. In the **Attach Document** dialog box, click **Choose File** to select the document and click **Attach** to add the document to the SOW. Attachments added to the SOW will display a **File Name**, a **Description**, a **Size**, and a **Public** flag. The public flag controls viewing by the supplier. To remove an attachment, click the X next to the file name. The total maximum attachment size per SOW is 50 MB.

5. Click **Continue**.

6. Review the **Clauses** page of the SOW response.

   During the acceptance process, the clauses cannot be modified; only during the review process are terms negotiated between the buyer and supplier. Please refer to the Supplier Reviews and Responds to an SOW section above for additional information. If terms require modification during the acceptance process, the supplier should **Decline** the SOW.

   Suppliers can only modify the clauses during the collaboration stage of the SOW and not during acceptance.

7. Click **Continue**.

8. Review the **Characteristics** page of the SOW response.

   During the acceptance process, the characteristics cannot be modified; only during the review process are terms negotiated between the buyer and supplier. Please refer to the Supplier Reviews and Responds to an SOW section above for additional information. If terms require modification during the acceptance process, the supplier should **Decline** the SOW.

9. Click **Continue**.

10. Complete the **SOW Workers** page of the SOW response.

    As a reminder, suppliers are always responsible for adding the SOW workers; the buyer does not perform this activity. Suppliers have the option to **Add SOW Worker** or **Submit an existing SOW Worker**. If SOW workers are applicable to the SOW, the supplier can add the workers when initially responding to the SOW or after the response has been submitted to the buyer. The supplier can add a new worker or search and find an existing worker to add to the SOW.

    In the event the buyer permits suppliers to submit workers to unconfirmed SOWs, SOW workers can be added while the SOW is in the status of **Pending Buyer Review**, **Pending Approval**, or **Response Pending Approval**. The SOW template rule **Allow Addition of Workers During Approval** must be enabled to allow suppliers to submit SOW workers on unconfirmed SOWs.

Note: Workers will not be able to register until the SOW is approved.

Note: When adding an SOW Worker, the **Add SOW Worker** dialog box fields must be completed. Please refer to the Supplier Adds an SOW Worker section below for additional information.

11. Click **Continue**.
12. Complete the **Review** page of the SOW response.
13. Click **Submit**.
14. Add any additional comments that the buyer user should see with your response. Click **Submit**.

Supplier Adds an SOW Worker

Workers can be added during the initial SOW response or any time in the lifecycle of an active SOW. Supplier users always add SOW workers; buyer users do not perform this activity.

In the event the buyer permits suppliers to submit workers to unconfirmed SOWs, SOW workers can be added while the SOW is in the status of **Pending Buyer Review**, **Pending Approval**, or **Response Pending Approval**. The SOW template rule **Allow Addition of Workers During Approval** must be enabled to allow suppliers to submit SOW workers on unconfirmed SOWs. **Note**: Workers will not be able to register until the SOW is approved.

To add an SOW worker, perform the following:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Select **Add SOW Worker** from the **Actions** list.

Note: If adding a worker during the SOW response, the **Add SOW Worker** section will expand for worker additions. Otherwise, an **Add SOW Worker** page appears when **Add SOW Worker** is selected from the **Actions** drop-down on the SOW.

4. Complete the **Add SOW Worker** dialog box when adding workers during the SOW response or complete the **Add SOW Worker** page when adding workers after the initial SOW response.

   Note: The fields on this page may appear differently based on company configurations and SOW template rules.

Field Name	Description
Role / Site / Unit of Measure	Select the worker's **Role / Site / Unit of Measure** from the list. Only roles associated to the SOW by the buyer will appear in the list.
Supplier Reference	Enter the worker's **Supplier Reference.** A supplier reference provides another name or ID for the worker and it offers an

Field Name	Description
	additional search criteria.
First Name	Enter the worker's **First Name**.
Last Name	Enter the worker's **Last Name**.
Email	Enter the worker's **Email** address.
Security ID	If the buyer company requires a security ID to be entered, instructions will display to define the format.
Worker Owner	The **Worker Owner** defaults from the SOW. If the SOW template setting **Worker Owner can be changed** is set to **Supplier**, the **Worker Owner** field can be modified by the supplier. Select the **Worker Owner** from the list if applicable.
Site	The **Site** defaults from the SOW. If the SOW template setting **Allow changes to Site and Location on the SOW Work Order/Worker** is set to **Supplier**, the **Site** field can be modified by the supplier. Select the **Site** from the list if applicable.
Location	The **Location** defaults from the SOW. If the SOW template setting **Allow changes to Site and Location on the SOW Work Order/Worker** is set to **Supplier**, the **Location** field can be modified by the supplier. Select the **Location** from the list if applicable.
Start Date	Enter the worker's **Start Date**. The worker **Start Date** must be equal to the SOW Start Date or after the SOW Start Date and before the SOW End Date.
End Date	Enter the worker's **End Date**. The worker **End Date** must be equal to the SOW End Date or before the SOW End Date and after the worker Start Date.
Time Sheet Start Date	Enter the worker's **Time Sheet Start Date**. This date cannot be before the worker Start Date defined above.
Resume/CV	Attach a Resume/CV. This is optional unless the **Supplier must submit Resume/CV** SOW Template rule is enabled.
Time Sheet Type	Select the Worker's **Time Sheet Type**. The **Time Sheet Type** will default to what was defined on the SOW by the Buyer.
Time Sheet Frequency	Select the worker's **Time Sheet Frequency**. **Time Sheet Frequency** options may include: **Weekly**, **Biweekly**, **Semimonthly**, or **Monthly** depending on the company level configuration enabled by Buyer Administrators for frequencies permitted.
Use Daily Verification	This option will only appear if **Use Daily Verification** is enabled in the company settings. When this configuration is enabled, workers that use weekly time sheets will be able to select verifiers for each day's hours.
Start Day of Week	Select the worker's **Start Day of Week**. When viewing the time sheet, the week day selected as the **Start Day of Week** will appear as the first day of the time sheet.
Hours per Day	Enter the standard Hours per Day.

Field Name	Description
Hours per Week	Enter the standard Hours per Week.
Allow Worker to submit SOW Line Items	Select **Yes** or **No** for **Allow Worker to submit SOW Line Items.**
Auto Invoice all Characteristics, Time Sheets and Expense Sheets	Select **Auto Invoice all Characteristics, Time Sheets and Expense Sheets**. If selected, upon time sheet or expense sheet approval, the items will be auto-invoiced.
Remit-to-Address	Select the **Remit-to-Address** if applicable.
Purchase Order Number	Enter the worker's **Purchase Order Number** if applicable.
Presented Rate	The **Requested** Rate from the Buyer will display as read-only. Enter the **Presented** Rate for the Worker.
Adjustments	Add any relevant **Adjustments**.

5. Click **Add**.

Supplier Adds an Existing Worker
Existing workers can be added during the initial SOW response or any time in the lifecycle of an active SOW. Supplier users always add existing SOW workers; buyer users do not perform this activity.

In the event the buyer permits suppliers to submit workers to unconfirmed SOWs, existing SOW workers can be added while the SOW is in the status of **Pending Buyer Review**, **Pending Approval**, or **Response Pending Approval**. The SOW template rule **Allow Addition of Workers During Approval** must be enabled to allow suppliers to submit SOW workers on unconfirmed SOWs. **Note**: Workers will not be able to register until the SOW is approved.

To add an existing SOW worker, perform the following:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Select **Submit Existing** from the **Actions** list.
4. Search for the existing worker using the search criteria fields under **Advanced Search: Workforce** and click **Search**.
5. Click the **ID** link of the desired existing worker.
6. Complete the required fields on the **Add SOW Worker** page.

   Note: Some fields will be pre-populated based on the existing worker data. Please refer to the Supplier Adds an SOW Worker section above for additional field information.
7. Click **Add**.

   Note: The worker will be added to the SOW with a new work order ID and worker ID, and the worker will be flagged as a potential match.

Supplier Adds an Active Worker

When the company configuration **Suppress Fieldglass onboarding and offboarding tasks and auto-register when transferring worker to another SOW** is enabled, any supplier providing SOW workers can submit active workers from one SOW to another SOW. Active workers can be added during SOW acceptance or any time after the SOW is approved and active.

To add an active SOW worker, perform the following:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Select **Add Active Worker** from the **Actions** list.
4. Click the **ID** link of the desired active SOW worker.
5. Complete the required fields on the **Add SOW Worker** page.

   Note: Some fields will be pre-populated based on the existing worker data. Please refer to the Supplier Adds an SOW Worker section above for additional field information.
6. Click **Add**.

   Note: The worker will be added to the SOW with a new work order ID and worker ID, and the worker will be flagged as a potential match.

MANAGE SOW WORKERS

Introduction

When a statement of work utilizing SOW workers is created and accepted by the supplier, workers may then be added. When a worker is submitted by a supplier, a work order is automatically created in SAP Fieldglass for the worker. The work order contains information such as the dates of the assignment, the rate of pay, site, worker role, and worker supervisor. Please see the preceding section **Supplier Adds an SOW Worker** for the additional worker data that is submitted for the worker.

SOW workers may require review and approval by the buyer based on a buyer's configuration. When approving SOW workers, it is the related work order that is approved and this approval automatically applies to the worker record. Approving the work order will notify the worker that they should create a user account in SAP Fieldglass. Once the worker registers in the SAP Fieldglass application, their worker record is activated in the system. SOW worker records in SAP Fieldglass will display with an S icon that indicates that they are associated with an SOW.

Note: Some organizations may use the SOW setting **Auto Register SOW Worker** which does not require the worker to register.

SOW worker management may include updates to worker supervisors, cost centers, task codes, expense codes, and roles. Workers can be updated by navigating directly to the worker using the Worker ID or by navigating to the statement of work and selecting the Worker ID from the list of assigned workers.

When a worker requires updates to their start date, end date, worker role, or rate, the supplier makes this amendment. The supplier will select **Revise** on the worker record for these types of revisions. This section discusses the management of an SOW worker record. The following topics, **SOW Updates without a Revision** and **SOW Revisions** discuss the update management of an SOW.

Objectives

In this section, the following topics are discussed:

- Approve an SOW Worker
- Activate an SOW Worker
- Change a Worker Supervisor
- Change a Worker Supervisor for Multiple Cost Centers
- Supplier Revise an SOW Worker
- Withdraw a Worker
- Edit and Resubmit a Withdrawn Worker
- Close a Worker
- Reopen a Closed Worker
- Reset a Worker Password

Approve an SOW Worker

For companies that require the SOW workers to be approved, the work order will route to the defined approver(s).

Note: When a buyer-entered custom field exists on an SOW worker, buyers are able to complete the custom fields at the time of approval.

To approve an SOW worker, perform the following tasks:

1. Click the **Work Items** menu and select **Approve** under **SOW Worker**.
2. Click the **ID** link of the desired SOW worker to approve.

   Note: When approving SOW workers, it is the related work order that is approved and this approval automatically applies to the worker record.
3. Click **Approve**.
4. In the **Approve Work Order** dialog box, enter **Comments** if applicable and click **Approve**.

   Note: Once the work order is approved, the status of the work order may change to **Accepted** or **Activated**. The **Next Step** for **Accepted** work orders is **Activate the SOW Worker**. The **Next Step** for **Activated** work orders is **Worker Register**. Please proceed to the following section Activate an SOW Worker for additional information on activating and registering the worker.

Activate an SOW Worker
In some organizations, SOW workers may require activation before the worker can register in Fieldglass. For example, companies may have an onboarding process that must be completed before they will allow a worker the ability to submit time sheets and expense sheets in the system.

When the **Auto Activate SOW Worker** setting is not enabled on an SOW, the SOW worker must be activated by a buyer user with **Activate Work Order** user permissions.

To activate an SOW worker, perform the following tasks:

1. Click the **Work Items** menu and select **Activate** under **SOW Worker**.
2. Click the **ID** link of the desired SOW worker to activate.

   Note: When activating SOW workers, it is the related work order that is activated and this activation automatically applies to the worker record.
3. Click **Activate**.
4. In the **Activate Work Order** dialog box, click **OK**.

   Note: The **Next Step** displays **Worker Register** unless either **Auto Register SOW Worker** is enabled or the worker will not have time sheet or expense sheet invoicing. **Start Worker (Buyer)** is displayed instead.
5. For workers that must register in Fieldglass, an automated e-mail notification is sent to the worker and the worker will click on **Create Your Account** to register.

Change a Worker Supervisor
Worker supervisors are typically responsible for the day-to-day activities of a worker and may be required to approve a worker's time sheets, expense sheets, and profile changes.

A worker can have a different supervisor for each cost center associated to their work order, and the worker's supervisor for a cost center can be updated. The following procedure outlines the steps to change a worker supervisor for one cost center. To change the supervisor for multiple cost centers simultaneously, please proceed to the following topic, **Change the Worker Supervisor for Multiple Cost Centers**.

To change a worker supervisor for one cost center:

1. Click the **View** menu and select **Worker**.
2. Click the **ID** link of the desired worker.
3. Click the **Cost Allocation** tab.
4. If there are more than one cost centers associated to the worker, highlight the **Cost Center** to be updated in the **Assigned Cost Centers** section.
5. Click **Change Supervisor**.
6. In the **Change Supervisor** dialog box, select the **New Supervisor** from the list.
7. Select **Reassign pending Work Items** if the pending work items for the worker need to be rerouted to the new supervisor.
8. Click **Update**.

   Note: The change takes effect only for the selected cost center. To update the supervisor for additional cost centers, repeat the steps above. Alternatively, the supervisor can be updated for multiple cost centers using the **Manage Cost Center** action. Proceed to the following topic, Change a Supervisor for Multiple Cost Centers for additional details.

Change a Worker Supervisor for Multiple Cost Centers

A worker may have multiple cost centers associated to their work order, and different supervisors can be associated to the worker's cost centers. The worker's supervisor for a cost center can be updated cost center-by-cost center, or multiple cost center supervisors can be updated simultaneously. The following procedure outlines the steps to change a worker supervisor for multiple cost centers.

To change a worker supervisor for multiple cost centers:

1. Click the **View** menu and select **Worker**.
2. Click the **ID** link of the desired worker.
3. Click **Actions** and select **Cost Center Management**.
4. Select **New Supervisor** and if you **Pending Work Items** needs to be reassigned.
5. Enter all or part of the new supervisor name in the **Select & Assign** field and select the correct supervisor from the list.
6. Select the **Cost Center** check boxes that will be updated with the new supervisor.

   Note: To select all of the cost centers, select the **Supervisor** check box in the **Search Cost Centers** section.
7. Click Select & Assign.

   Note: The selections appear in the **Selected Cost Centers** section.

8. Deselect any cost center check boxes that will not be updated with the new supervisor.
9. Click **Update**.
10. To verify the updates, click the **Cost Allocation** tab.

Supplier Revise an SOW Worker

Updates to an SOW worker's start date, end date, worker role, or rate must be completed by the supplier. This section explains how a supplier will modify a worker record to create these revisions.

To revise an SOW worker as the supplier, the following steps must be completed:

1. Click the **View** menu and select **Worker**.
2. Click the **ID** link of the desired worker.
3. Click **Actions** and select **Revise**.
4. On the **Revise SOW Worker** dialog box, complete the **Revision Start Date**, **End Date**, and the applicable worker adjustment(s).

Field Name	Description
Supplier Reference	Enter the worker's **Supplier Reference**. A supplier reference provides another name or ID for the worker and it offers an additional search criteria.
Revision Start Date	Enter the worker's **Revision Start Date**. The worker **Revision Start Date** must be equal to the SOW Start Date or after the SOW Start Date and before the SOW End Date. By default, the **Revision Start Date** will populate with the next day after the original End Date.
End Date	Enter the worker's **End Date**. The worker **End Date** must be equal to the SOW End Date or before the SOW End Date and after the worker Start Date.
Role / Site / Unit of Measure	Select the worker's **Role / Site / Unit of Measure** from the list. Only roles associated to the SOW will appear in the list.
Auto Invoice all Characteristics, Time Sheets and Expense Sheets	Select **Auto Invoice all Characteristics, Time Sheets and Expense Sheets**. If selected, upon time sheet or expense sheet approval, the items will be auto-invoiced.
Worker Owner	The **Worker Owner** defaults from the SOW. If the SOW template setting **Worker Owner can be changed** is set to **Supplier**, the **Worker Owner** field can be modified by the supplier. Select the **Worker Owner** from the list if applicable.
Site	The **Site** defaults from the SOW. If the SOW template setting **Allow changes to Site and Location on the SOW Work Order/Worker** is set to **Supplier**, the **Site** field can be modified by the supplier. Select the **Site** from the list if applicable.
Location	The **Location** defaults from the SOW. If the SOW template setting **Allow changes to Site and**

Field Name	Description
	Location on the SOW Work Order/Worker is set to **Supplier**, the **Location** field can be modified by the supplier. Select the **Location** from the list if applicable.
Hours per Day	Enter the **Hours per Day**.
Hours per Week	Enter the **Hours per Week**.
Rate Category	The **Rate Category** populates based on the **Role / Site / Unit of Measure** selected above.
Requested	The **Requested** rate populates based on the **Role / Site / Unit of Measure** selected above.
Presented	Enter the **Presented** rate for the worker role and site.

5. Click **Revise**.

Withdraw a Worker
At times, suppliers may need to make changes to an SOW worker or remove an SOW worker after they have been submitted to an active statement of work. To support this workflow, the company configuration, Allow Suppliers to Withdraw SOW Workers, can be enabled by buyers. When enabled, suppliers with appropriate permission can withdraw SOW workers from an SOW response or an active SOW revision response, as long as those workers are in an appropriate status. Withdrawn workers can be edited and resubmitted for buyer approval as needed.

Suppliers can withdraw SOW workers when viewing workers on the SOW Workers tab of statements of work, and on SOW worker orders that are in the following Statuses:

- Draft
- Pending Approval
- Approval Paused

To withdraw an SOW worker, the following tasks must be complete:

1. Click the **View** menu and select **Work Order**.
2. Click the **ID** link of the desired **Work Order** for the worker.
3. Click the **Withdraw** button
4. On the **Withdraw SOW Worker** dialog box, select the **Reason** and enter **Comments**.
5. Click Withdraw

Note: The worker status is updated to **Withdrawn** with the **Reason** appended.

In the Work Orders list view, suppliers can filter the list to easily find workers in **Withdrawn** status. Workers in Withdrawn status can be edited and resubmitted to the statement of work, or they can be removed. When viewing withdrawn workers, the status and any supplier entered comments display in the badge area of the work order. Withdraw activities are tracked in the System Audit Trail.

Edit and Resubmit a Withdrawn Worker
Suppliers may edit withdrawn SOW workers and resubmit them back to the current active version of the statement of work.

To **Edit** and Resubmit an SOW worker, the following tasks must be complete:

1. Click the **View** menu and select **Work Order**.

2. Click the **ID** link of the desired **Work Order** for the worker.
3. Click the **Edit Work Order** button.
4. Enter the necessary information and on the **Edit Work Order** page. Please see the preceding section Supplier Adds an SOW Worker for the additional worker data that is submitted for the worker.
5. Click Update

Note: Once a supplier edits a withdrawn SOW worker, upon **Update**, the worker will automatically be resubmitted back to the current active version of the statement of work. If a revision is in progress, the worker will be resubmitted to the version of the SOW on which the worker was withdrawn.

During an SOW revision response, the supplier can edit SOW workers who were previously submitted to the SOW and are in Confirmed or Draft status. Work orders in other statuses cannot be edited or modified on the SOW revision response and therefore withdrawn workers cannot be resubmitted on the response. Suppliers can however resubmit the withdrawn worker directly from the work order.
If the buyer closes the statement of work, associated work orders will also be closed, including any work orders in Withdrawn status.

Withdrawn SOW workers can be removed by the supplier by selecting Remove from the Actions menu of the work order. Once confirmed, the removed work order can no longer be resubmitted to the SOW.

Close a Worker
In certain cases, an SOW worker's record should be closed. For example, a worker may have reached their agreed upon end date or the worker may have accepted another assignment. Closing a worker will prevent the worker from submitting time sheets and expense sheets beyond their work order end date.

Before closing a worker, all work order revisions must be processed. A worker with a work order revision in a **Pending Approval** status cannot be closed. The work order revision must be approved or rejected prior to the worker being closed.

To close a worker, the following tasks must be completed:

1. Click the **View** menu and select **Worker**.
2. Click the **ID** link of the desired worker.
3. Click **Actions** and select **Close Worker**.
4. On the **Close Worker** dialog box, select the **Reason, Actual End Date**, and enter **Comments**.
5. Click **Close Worker**.

   Note: The worker status is updated to **Closed** if the **End Date** is in the past. If the **End Date** selected is today's date or is future dated, the worker status reflects **Open** with the end date in parentheses. The status will change to **Closed** upon the reaching the selected end date.

Reopen a Closed Worker
If a worker is closed in error, an Administrator can re-open a closed worker's profile.

To reopen a closed worker:

1. Click the **View** menu and select **Worker**.

2. Click the **ID** link of the desired closed worker.
3. Click **Reopen**.
4. On the **Reopen Worker** dialog box, enter **Comments**.
5. Click **Reopen**.

   The status of the worker is updated to **Open**.

Reset a Worker Password
If a worker has forgotten their password, the user with the necessary user role permissions can reset the password for the worker.

To reset a worker password:
1. Click the **View** menu and select **Worker**.
2. Click the **ID** link of the desired worker.
3. Click **Actions** and select **Reset Password**.
4. On the **Reset Password** dialog box, click **Reset**.

   Note: A new password is created for the user and an automated e-mail notification is sent to the worker with the new password.

SOW UPDATES WITHOUT A REVISION

Introduction
A statement of work Owner or Creator may need to update or modify an SOW. These types of changes can be made by editing the statement of work directly or by creating a statement of work revision. A revision is created by editing the SOW or by creating an SOW revision. In order to edit an SOW without creating a revision, the company configuration, **Allow change to Statement of Work without a Revision** must be enabled.

SOW and SOW Worker updates can be made using multiple Fieldglass actions. This section explains how to update an SOW directly using the **Edit Statement of Work** function. The previous section explains revisions to the SOW worker record and the following section discusses using the SOW revision feature.

The following fields can be updated on an SOW without a revision:

- Buyer Reference
- Owner
- Business Unit
- Site / Location
- Cost Center
- Primary Cost Center
- Cost Center Allocation
- Task Code
- General Ledger Account Code
- Management Events
- Schedules
- Events

The updates permitted while editing an SOW are also supported via a revision. However, revisions must always be completed to update the following:

- Maximum Budget
- MSP Service Fee %
- Rules
- Clauses
- SOW Timesheet Parameters
- SOW Worker Roles
- SOW Rates

Objectives
To update an SOW, the following activities may occur:

- Edit an SOW without a Revision
- Add Management Event, Add Schedule, and Add Event to SOW
- Change Owner on an SOW Event

Edit an SOW without a Revision
Modifications to an SOW can be completed by editing the SOW. Information on the **Edit SOW** page defaults from the original SOW, and only open fields can be updated.

To edit an SOW:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **Edit Statement of Work.**

   Note: A warning appears at the top of the page indicating that a revision is automatically generated when the Owner, Business Unit, Site, or Cost Center are modified. However, the revision will not require approval. When the update is completed, a revision number is appended to the SOW ID, and the status is **Approved**.

   The **Edit SOW** page contains an **Information** section, a **Timeline** section, an **Accounting** section, and a **Cost Allocation** section.

4. Complete the **Information** section.

Field Name	Description
Name	The **Name** of the SOW cannot be modified.
Description	The **Description** of the SOW cannot be modified. Descriptions might contain details regarding the purpose of the SOW, the description of the project or program, a description of the services required, the amount budgeted, the type of contract, qualifications, etc.
Buyer Reference	Enter a **Buyer Reference**. A buyer reference provides another name or ID for the SOW and it offers an additional search criteria. The **Buyer Reference** is visible to the buyer and supplier. Buyer users

Field Name	Description
	with **Edit Reference** user role permissions are permitted to modify references. The supplier has the option to enter a **Supplier Reference** for their internal naming and search purposes on the SOW. The **Supplier Reference** is visible to the buyer and supplier.

5. Complete the **Timeline** section.

Field Name	Description
Start Date	The **Start Date** of the SOW cannot be modified when editing an SOW.
End Date	Enter the **End Date** for the project or work or use the calendar to select a date. **Note**: If workers will be associated to the SOW and will submit time sheets in Fieldglass, enter the date that workers will end their assignment. After the end date, the worker will not be able to enter time sheets unless a revision is created to extend the work order. Please refer to the **Supplier Revise an SOW Worker** section in this document for additional details.

6. Complete the **Accounting** section.

   To update a field in the **Accounting** section, click **Edit** and select the new value(s) in the **Change Statement of Work** dialog box. When completed, click **Change**.

   If changes are made to the **Owner**, **Site**, or **Location** when editing an SOW, the change(s) may also take effect on any existing work orders and workers associated with the SOW. If the changes being made on the SOW should not be transferred to workers and work orders, a company configuration may be enabled, **Do Not Propagate Owner, Site and Location from Statement of Work to existing Workers and Worker Orders** supports the need to preserve edits made to work orders and workers associated to the SOW. Please refer to the Services Administration Guide for additional information.

Field Name	Description
Owner	Select an **Owner**. SOW owners may be responsible for several aspects of an SOW, such as approving the SOW and approvals of revisions and invoices related to the SOW.
Business Unit	Select a **Business Unit**. The available business units depend on the following: the owner's associated business units, the creator's business units if the creator differs from the owner, and the business units associated to the SOW template. SOW approval workflows can be designed to use business units to define the approval routing.
Site	Select a **Site**. The site is where the project or work will be performed.

Field Name	Description
	The available sites depend on the following: the owner's associated sites, the creator's sites if the creator differs from the owner, and the supplier's association to the sites.
Location	Select a **Location** if applicable. The location is a dependent on the site selected above and may default to the same **Site** if locations are not configured for the customer.
Maximum Budget	The Maximum Budget cannot be modified when editing a SOW. The existing budget is displayed.

7. Complete the **Cost Allocation** section.

Field Name	Description
Cost Center	Select the **Cost Center**. More than one cost center can be added. The available cost centers depend on the owner's associated cost centers. Cost Centers require an **Allocation %** if more than one cost center is selected. The **Allocation %** must total 100%. Use **Auto Calculate** on the right of the **Cost Allocation** section if the total budget amount will be split equally between the cost centers. If more than one cost center is added, the **Primary Cost Center** must be selected. The **Allocation %** and **Primary Cost Center** values are used primarily for reporting purposes and do not limit charges to cost centers if spend incurred is above the allocation thresholds. If a cost center is not defaulted on the user profile, a list view is displayed and only the last 5 used cost centers will appear in the list. Click **Add or remove Cost Centers** to select a different cost center or additional cost centers. When using **Add or remove Cost Centers**, a **Statement of Work Cost Allocation** dialog box appears. Select **Used** or **Unused** to search for the cost center. After filtering, select the cost center check box(s) and click **Add Selected**. Ensure the **Selected Cost Centers** are correct and click **Update**.
Task Code	Select the **Task Code**. **Task Codes** are associated to cost centers, and the list will depend on the cost center(s) selected above. The **Task Code** field only appears when the company level configuration **Approver can specify Cost Center and Task Code on SOW Characteristics** is enabled. If this field is enabled, when a schedule, event, or fee is being approved, the approver must specify the cost center and task code for the characteristic. Please refer to the Services Administration Guide for additional details.
General Ledger	Select the **General Ledger** if in use for your company.

8. Click **Update**.

Add Management Event, Add Schedule, Add Event, and Add Fee to SOW
Modifications to an SOW's characteristics may be required after the SOW has been submitted. In some cases, updates may not require an SOW revision.

If the SOW template setting **Allow addition of Management Events, Schedules, Events and Fees after Statement of Work is created** is enabled, these characteristics can be updated by users with the SOW **Manage** user role permission. With this setting enabled on the SOW, updates do not require an SOW revision. However, certain rules for updating these characteristics apply and must be considered. For example, line items cannot be added if they exceed the maximum budget on the SOW. If an SOW revision is in progress, line items cannot be added that cause the budget to exceed either the budget of the currently approved SOW or the budget of the SOW revision. In addition, line items cannot have a **Due On** date later than the **End Date** of the SOW. If an SOW revision is in progress, line items cannot have an **End Date** later than the **End Date** of the currently approved SOW or the **End Date** of the SOW Revision, whichever is earlier.

Note: An SOW revision is required to modify these characteristics if the template setting is not enabled. Please refer to the **SOW Revisions** section below for additional information.

Similarly, a supplier can also modify these characteristics without a revision if the SOW is not **Buyer** defined and if these characteristics are enabled on the SOW. From the supplier view, the following options appear on the SOW when these conditions are met:

To add a Management Event to an SOW:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **Add Management Event** from the **Actions** list.
4. Complete the fields on the **Add Management Event** page.

   Please refer to the **Add Management Event** section under the **Add SOW Characteristics** topic for additional details on Management Event fields.
5. Click **Submit**.

To add a Schedule to an SOW:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **Add Schedule** from the **Actions** list.
4. Complete the fields on the **Add Schedule** page.

   Please refer to the **Add Schedules** section under the **Add SOW Characteristics** topic for additional details on Schedule fields.
5. Click **Submit**.

To add an Event to an SOW:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **Add Event** from the **Actions** list.
4. Complete the fields on the **Add Event** page.

   Please refer to the **Add Events** section under the Add SOW Characteristics topic for additional details on Event fields.
5. Click **Submit**.

To add a Fee to an SOW:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **Add Fee** from the **Actions** list.
4. Complete the fields on the **Add Fee** page.

   Please refer to the **Add Fee** section under the Add SOW Characteristics topic for additional details on Event fields.

Update Owner on Schedule or Event
In some cases, clients need to route the approval of schedules and events on an SOW to a specific user who is not the SOW owner. Users with the system role, **Line Item Owner**, can be used in schedule and event approval groups.

When an SOW is created or revised to include schedules or events, the SOW owner defaults as the owner of the line item. However, the Line Item Owner can be changed on individual schedules and events. After the line items have been created, users with the SOW Manage user role permission can go to each line item and choose the action Change Owner.

To change the owner on a Schedule or Management Event:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click the **Characteristics** tab.
4. Click the **Name** link of the **Schedule** or **Event**.
5. Click **Change Owner** from the **Actions** list.
6. On the **Change Owner** dialog box, select the **Owner** and enter **Comments**.

   Note: Only users who have visibility to the SOW and permission to act on it are available in the list.
7. Click **Update**.

Note: An upload is available which allows the buyer to specify the owners of multiple line items in a single upload.

SOW REVISIONS

Introduction

A statement of work owner or creator may need to update or modify an SOW. These types of changes can be made by editing the statement of work directly or by creating a statement of work revision. A revision is created by editing the SOW or by creating an SOW revision. At any point during this process, the buyer or supplier may have the option to **Review and Submit** the form, skipping subsequent pages.

This section explains how to revise an SOW. SOW and SOW Worker updates can be made using multiple Fieldglass actions. The prior sections discuss revisions to the SOW worker record and direct updates to the SOW without a revision.

The following values can be updated with an SOW revision:

- Buyer Reference
- Owner
- Business Unit
- Site
- Cost Center
- Primary Cost Center
- Cost Center Allocation
- Task Code
- General Ledger Account Code
- Management Events
- Schedules
- Events
- Maximum Budget
- MSP Service Fee %
- Rules
- Clauses
- SOW Timesheet Parameters
- SOW Worker Roles
- SOW Rates

Objectives

To update an SOW, the following activities may occur:

- Revise an SOW
- Approve an SOW Revision
- Remove an SOW Revision

Revise an SOW

To revise an SOW:

1. Click the **View** menu and select **Statement of Work**.

2. Click the **ID** link of the desired SOW.
3. Click **Revise.**
4. Complete the **Setup** page**.**

   Note: Only open fields may be revised. If modifications are required to non-editable fields, a new SOW may need to be created to accommodate the adjustments.

Field Name	Description
Select SOW Owner	Select the **Statement of Work Owner**. SOW owners may be responsible for several aspects of an SOW, such as approving the SOW and approvals of revisions and invoices related to the SOW. Owner can also be modified using the **Edit Statement of Work** action.
SOW Billing Currency	Value defaults from original SOW and cannot be modified.
Billable	Value defaults from original SOW and cannot be modified.
Classification	Value defaults from original SOW and cannot be modified.

5. Click **Continue**.
6. Complete the **Details** page.

   Note: Only open fields may be revised. If modifications are required to non-editable fields, a new SOW may need to be created to accommodate the adjustments. Also, some fields may be modified with the **Edit Statement of Work** action.

Field Name	Description
Name	Value defaults from original SOW and cannot be modified.
Description	Value defaults from original SOW and cannot be modified.
Start Date	Value defaults from original SOW and cannot be modified.
End Date	Enter the new **End Date** for the project or work or use the calendar to select a date.
Defined By	Value defaults from original SOW and cannot be modified.
Buyer Reference	Enter a **Buyer Reference**. A buyer reference provides another name or ID for the SOW and it offers an additional search criteria.
Business Unit	Value defaults from original SOW and may be modified using the **Edit Statement of Work** action.
Site	Value defaults from original SOW and may be modified using the **Edit Statement of Work** action.
Location	Value defaults from original SOW and may be modified using the **Edit Statement of Work** action.
Comments	Enter **Comments** if applicable for the SOW revision.

Field Name	Description
Maximum Budget	Enter a new **Maximum Budget**. The Maximum Budget can only be modified when creating a revision; the **Edit Statement of Work** action does not support changes to the budget. The existing SOW budget is displayed.
MSP Service Fee %	Enter the **MSP Service Fee %.**
Cost Center	Manage the cost center(s) from the original SOW if applicable for the SOW revision.
Allocation %	Manage the cost center(s) allocation from the original SOW if applicable for the SOW revision.
Primary Cost Center	Manage the primary cost center(s) from the original SOW if applicable for the SOW revision.
Task Code	Select the task code if applicable for the SOW revision.
Rule: Disallow Approval of items when Maximum Budget is exceeded	Select or deselect the rule if applicable for the SOW revision.
Rule: SOW Revision approval required only when Maximum Budget is increased	Select or deselect the rule if applicable for the SOW revision.
Rule: Suppress Budget Amount from Suppliers	Value defaults from original SOW and cannot be modified.
Rule: Allow use of Fees with SOW Workers	Value defaults from original SOW and cannot be modified.
Rule: Allow Supplier to select Approver for Fee Response	Select or deselect the rule if applicable for the SOW revision.
Rule: Auto Invoice all Characteristics, Time Sheets and Expense Sheets	Value defaults from original SOW and cannot be modified.
Attachments	Add attachments if applicable for the SOW revision.

7. Click **Continue**.

8. Complete the **Clauses** page.

   Note: Please refer to the previous Add SOW Clauses section for additional information on adding, removing, or editing clauses.

9. Click **Continue**.

10. Complete the **Characteristics** page.

Note: Please refer to the previous Add SOW Characteristics section for additional information on adding, removing, or editing characteristics.

11. Click **Continue**.

12. Complete the **SOW Workers** page.

    Note: Please refer to the previous Add SOW Workers section for additional information on editing SOW worker characteristics.

13. Click **Continue**.

14. Complete the **Review** page.

    Note: Please refer to the previous Complete SOW Review section for additional information on completing the SOW review.

15. Click **Submit**.

    Note: Please refer to the Submit an SOW section above for additional information on the submittal process. An SOW revision may follow the same rules of submittal and approval as the original SOW depending on the company configuration and template rules and settings.

Approve an SOW Revision

An SOW revision may require approval depending on company workflow design for SOW revision approval. In the event there is an approval process, the approver may also have an **Editor** permission. An **Edit** button appears in addition to the **Approve** and **Reject** button for approvers with an **Editor** permission.

SOW revision approval is typically required prior to the SOW revision being sent to the supplier. However, there is an option to permit SOW revision visibility to suppliers prior to approval. The **Allow supplier to view Statement of Work and Statement of Work Revisions in Pending Approval** permission is granted at the company level by Administrators. Please refer to the Services Administration Guide for additional details.

To approve an SOW revision:

1. Click **Work Items** and select **Approve** under **Statement of Work**. Alternatively, click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **Edit** if you have **Editor** permissions and desire to modify the SOW.

   Note: Editors have the ability to make changes to clauses on the SOW. If the Editor adds or modifies clauses, the Editor is enforced as the Collaborator. If the Editor approves the SOW, the clauses will be systematically marked as **Reviewed**.

4. Click **Approve**.

   The SOW status will remain in a **Pending Approval** status or change to a **Pending Response** status depending on the customer SOW workflow design. When subsequent approvals are required, consult the **Approvals / Audit Trail** tab to view the next approver.

Remove an SOW Revision
If a Statement of Work Revision is in either a **Draft** or **Rejected** status by the buyer, buyers with the user role permission **Delete Rejected/Draft SOWR** under the Statement of Work module are able to remove the statement of work revision if necessary.

To remove an SOW Revision:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **Remove.**
4. In the **Remove** dialog box, click **Remove**.

   Note: The revision number and history of the revision is removed and is not reflected on the SOW.

SOW BID

Introduction
A statement of work creator may have existing suppliers, potentially with pre-existing rate cards, and want to be able to bid out a project without going through the formal RFX process. SOW templates with the rule **Can be used to create SOW Bid** enabled can be utilized to allow multiple suppliers to review, collaborate, and respond to the scope of work prior to the creation of the SOW.

SOW bids are shown in the Statement of Work list view. A new **SOW Bid** type has been added, which allows users to group SOW bids.

Objectives
To utilize an SOW bid:

- Create an SOW Bid
- Supplier Responds to an SOW Bid
- Redistribute an SOW Bid
- View SOW Bid Responses and Create an SOW from an SOW Bid

Create an SOW Bid
Buyers create an SOW bid document that outlines the scope of work similar to an SOW; however, the SOW bid itself is non-transactional. A transactional SOW can later be created from the SOW bid to award a supplier with the project.

To allow a buyer user to create an SOW bid, at least one SOW template must have the rule **Can be used to create SOW Bid** enabled. In addition, at least one billable characteristic must be selected for use on the template.

To create an SOW bid:

1. Click the **Create** menu and select **Statement of Work**.

2. Select the appropriate **Classification**.

3. Click **Make Changes**, then select the **Yes** radio button under **Create SOW Bid?** This filters the Template List to only show templates that have the **Can be used to create SOW Bid** flag enabled.

4. Select the appropriate template to use for creating the SOW bid.

5. Complete all SOW fields as described in the **Complete SOW Details** section of this document. Some fields/sections specific to the SOW bid document:

Field Name	Description
Responses Due Date	Allows supplier to see when buyer would like to receive responses to the SOW bid. This field is informational only and does not affect buyer or supplier actions on the SOW bid or its responses.
Add or Remove Suppliers	Click this link to update the list of suppliers who will receive the SOW bid. The supplier selected during the template selection is already included on the list. At least one additional supplier must be added to the SOW bid.
Add Attachments	Similar to SOWs, SOW bids allow multiple attachments. Attachments with Public visibility are visible to all suppliers who receive the SOW bid. Attachments on the SOW bid are copied to all SOWs created from the bid, but can be removed by the buyer upon SOW creation.
Requested Roles and Rates	This grid displays on SOW bids in place of the standard rate functionality used on SOWs. In this grid, buyers can add any SOW worker roles they are requesting. The same role can be used in multiple rows to request workers with that role in different sites or for different rates. Click **Add New Row** to add another row to the grid.

6. Click **Continue**.

   Note: Click **Complete Later** to save a draft of the statement of work.

7. Ensure each section from the preceding steps is correct. If modifications are required, click **Make Changes** under the appropriate section or click on the page title at the top of the SOW bid to return to that previous page.

8. At the bottom of the Review page, click **Submit**. Or, click **Complete Later** to save the SOW bid in **Draft** status and modify it prior to submitting it.

Supplier Responds to an SOW Bid

The supplier can **Respond** or **Decline** the SOW bid once received. The steps for declining an SOW bid are the same as declining an SOW.

Suppliers will perform the following when responding to an SOW bid:

1. From the **Work Items** menu, click the **Review** link under **Statement of Work**. Alternatively, click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW bid.
3. Click **Respond** or **Decline**.

   Note: If the supplier choses to **Decline**, an SOW Bid **Decline** reason must be selected.

4. Complete the **Details** page of the SOW Response. The details are the same as the SOW reponse.
5. Click **Continue**.
6. Review and click **Continue** on the **Clauses** page. Clauses on an SOW bid are read only; suppliers cannot take action on them.
7. Complete the **Characteristics** page of the SOW response.

   If the SOW bid is defined by the **Buyer and Supplier**, the supplier will see each characteristic that has been selected by the buyer along with any defined terms. The buyer is not required to define any of the terms under **Define Management Events**, **Define Schedules**, **Define Events**, or **Define Fees** and can simply select which characteristics are applicable and request the supplier to define the terms. The supplier may add, update, or remove terms for each applicable characteristic. The supplier cannot remove a characteristic section if the buyer has selected it on the SOW bid. The review process can go back and forth between a buyer and supplier to negotiate terms as applicable.

   If the SOW bid is defined by the **Supplier**, the supplier will see each characteristic allowed by the buyer. The buyer does not enter any of the terms under **Define Management Events**, **Define Schedules**, **Define Events**, or **Define Fees**. Rather, the supplier must enter and select the terms for each applicable characteristic. The supplier can also remove a characteristic section if the buyer has selected it on the SOW bid.

   Please refer to the Add SOW Characteristics section for additional information on how to define and manage characteristics.

8. Click **Continue**.
9. Review the Requested Roles and Rates information on the **SOW Workers** page of the SOW bid response. The supplier does not add SOW workers to the SOW bid.

   If the SOW bid is defined by the **Buyer**, the supplier can only change the rates in the Requested Roles and Rates section.

   If the SOW bid is defined by the **Buyer and Supplier** or **Supplier**, the supplier can edit any information in the table, including adding or removing SOW worker roles.

10. Click **Continue**.
11. Complete the **Review** page of the SOW bid response.

12. Click **Submit**.

    Add any appropriate comments before submitting the response.

13. Click **Submit**.

Redistribute an SOW Bid
Users with SOW **Redistribute** permission can redistribute an SOW bid to additional suppliers to receive further bids on the project.

To redistribute an SOW bid:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW bid.
3. Click **Actions**, then click **Redistribute**.
4. Check the box next to the appropriate additional suppliers, then click **Add Selected**.
5. Click **Redistribute**.

   Note: Sow bids can only be redistributed to suppliers that have not already received the SOW bid, support the services module, and are associated to the classification and site on the SOW bid.

View SOW Bid Responses and Create an SOW from an SOW Bid
Once SOW bid responses have been submitted, buyers can review and compare the responses, and select a response from which to create an SOW.

To review and compare SOW bid responses:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW bid.
3. Click on the **Responses** tab.
4. Use the Response View drop-down list to toggle between Characteristics and SOW Workers.

To create an SOW from an SOW bid:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW bid.
3. Click on the **Responses** tab.
4. Select the supplier SOW bid response from which you would like to create an SOW.
5. Click **Create Statement of Work**.
6. The SOW will inherit values from the SOW bid response, including clauses and line items. Most values can be edited as necessary

   The Requested Roles and Rates section will be read only when creating the SOW. The SOW Creator can use the **Add or remove Rates** link to add rates to the SOW.

7. Once the SOW is submitted, it is sent to the supplier for response or for approval, per existing SOW functionality.

Note: Any SOW created from an SOW bid will have the field **Created from SOW Bid** displayed in the Posting Information section.

RECALL AND CLOSE AN SOW

Recall an SOW

If edits need to be made to an SOW that has been submitted to a supplier for their review, there is an option to recall the SOW.

The **Recall SOW** option is only available on statements of work that are in a **Pending Supplier Review** status and do not contain **Clauses**. Also, the **Recall SOW** action is only available on the initial SOW. SOW revisions do not have this action. Additionally, if there are mandatory supplier entered custom fields that do not have values the **Recall SOW** action is not available until those fields are completed.

The **Allow Buyer to Recall SOW in Pending Supplier Review Status** company configuration must be enabled and the user must have the Recall SOW permissions. Please see the Services Administration Guide for additional information.

To recall an SOW:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired SOW.
3. Click **Recall Statement of Work.**

   When the SOW is recalled, the status changes back to **Pending Buyer Review**, and the buyer is permitted to **Edit** the SOW.

Close an SOW

An SOW may need to be closed after the project is not approved or is no longer needed.

To close an SOW:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired Statement of Work.
3. Select **Close Statement of Work** from the **Actions** list.

   Note: If there are any active workers on the SOW, the SOW cannot be closed until those workers are closed. The following warning will appear in this case:

   Note: The SOW can be closed if there are pending characteristics. However, if you require any further invoicing select **Allow Further Invoicing** prior to close.

4. When the **Close Statement of Work** dialog box is displayed, select a **Reason** for closing the SOW and enter any **Comments**. The buyer Administrator configures SOW Close reasons.
5. Click **Close Statement of Work**.

SOW INVOICING

Introduction

Invoicing on a statement of work can be accomplished in several ways. SOW invoices can be created from completed Schedules and Events if these payment terms exist on the SOW. SOW Fees can be invoiced if they are applicable to the SOW. Also, if there are SOW workers associated to the statement of work, time sheets, and expense sheets may be invoiced.

Often, Schedules, Events, and Fees are auto-invoiced upon approval. Schedules and Events will be marked as completed by the supplier, and suppliers will submit Fees. Buyers will approve these items and they can be automatically invoiced. Depending on the company configuration, workers may submit time sheets and expense sheets, which could be auto-invoiced upon approval as well. A customer may also opt to consolidate the invoices..

Another option allows the supplier to invoice the customer after schedules, events, fees, time sheets, or expense sheets have been approved. If the supplier creates manual invoices, auto-invoicing will not be enabled for the SOW. The supplier may select multiple items to include on an invoice or if the **Single line item per SOW invoice** is enabled in the company settings, only one item can be invoiced at a time.

When using the Services module, a service charge may be applicable. An MSP fee can be added as either Buyer Funded or Supplier Funded. The fee can be charged as a percentage or flat fee.

For customers using the **Supplier-funded** model, the MSP fee is subtracted from the bill-to-buyer amount to arrive at the pay-to-supplier amount. The MSP Fee is part of the invoice created by the supplier but the supplier receives less than the amount on the invoice.

For customers using the **Buyer-funded** model, the MSP fee is added to the pay-to-supplier amount to derive the bill-to-buyer amount for SOWs. The MSP Fee is listed separately from the pay-to-supplier amount on the invoice.

If there is a need to create multiple MSP fee values per services supplier, the buyer can use the admin object, **Custom Lookup** to define the format of the MSP lookup table. Once the custom lookup is created, the Pick List Value upload file is used to upload the suppliers and percentages.

Statements of work may include work done at many sites and in many tax jurisdictions. Line Items for schedules, events, and fees must have the correct site and adjustments in order to invoice the items correctly. Items on an invoice can only have one site because of taxes which can be associated to the site. To allow a supplier to change the site for an SOW line item, the company configuration **Allow Supplier to specify Site on Line Item** must be enabled.

For customers that enforce invoice adjustments, and do not wish to rely on the supplier to apply the correct adjustment, invoice adjustment groups can be established for the SOW module. Invoice adjustments can be created by the buyer and applied to SOW invoices for time sheets, expense sheets, schedules, events, and fees. In addition, they can be added to SOW credit/debit memos for time sheets, expense sheets, schedules, events, and fees. Also, when using Invoice Adjustment Groups on the SOW module, separate adjustments can be applied to supplier amounts and MSP fees. This is controlled via a new buyer user role permission under Statement of Work called **Change Adjustment Group**.

Customers may also opt to use Invoice Locations if they have SOWs with many SOW workers, potentially performing the work at a variety of sites, and the site of an SOW worker could be irrelevant for determining the invoice tax information. This feature allows a supplier to group an SOWs line items under one invoice, regardless of the site. The company configuration, **Create Statement of Work Invoice Using Invoice Location** would be enabled and invoice locations would be created and associated to Invoice Tax Information (ITI) and Division Codes.

In this section, the different options available are illustrated. However, organizations may not require all of these possibilities or other variations may exist. For example, a client that is integrated with their ERP system to manage invoicing may have a different process that is out of scope for this user guide.

Objectives

To invoice from an SOW, the following activities may occur:

- Buyer or Supplier Responds to a Management Event
- Supplier Responds to a Schedule
- Supplier Marks Event as Completed
- Supplier Creates a Fee
- Buyer Approves a Schedule, Event, and Fee
- Line Item Approval for Schedules and Events
- Buyer Create a Consolidated SOW Invoice
- Supplier Create an SOW Invoice

Buyer or Supplier Responds to a Management Event

Management Events can be completed by a buyer actor or a supplier actor. When the Management Event was defined on the SOW, the responsibility was specified as buyer or supplier.

To respond to an SOW Management Event as a buyer, complete the following tasks:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired Statement of Work.
3. Click the **Characteristics** tab of the SOW.
4. Click the **Management Events** radio button, then click the **Name** link of the desired Management Event.

   Note: For Management Events the buyer can act upon, the **Responsibility** will display as **Buyer.**
5. On the **SOW Management Event**, click **Respond**.
6. On the **Setup** page, enter or select the **Completed Date** and enter **Comments**. Add attachments using **Add Attachments** if applicable.
7. Click **Continue**.
8. On the **Review** page, ensure all of the details are correct. If changes are required, click **Make Changes**.
9. Click **Submit**.

To respond to an SOW Management Event as a supplier, complete the following tasks:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired Statement of Work.
3. Click the **Characteristics** tab of the SOW.
4. Click the **Management Events** radio button, then click the **Name** link of the desired Management Event.

   Note: The **Responsibility** will display as **Supplier** for Management Events the supplier can act upon.
5. On the **SOW Management Event**, click **Respond**.
6. On the **Setup** page, enter or select the **Completed Date** and enter **Comments**. Add attachments using **Add Attachments** if applicable.
7. Click **Continue**.
8. On the **Review** page, ensure all of the details are correct. If changes are required, click **Make Changes**.
9. Click **Submit**.

Supplier Responds to a Schedule
Schedules are completed by suppliers.

When auto invoicing or the company configuration **Prevent Supplier from Responding to Schedules Prior to Due Date** is enabled, suppliers are not able to mark a Schedule as complete until the due date has been reached. If the supplier tries to respond, the following message is displayed: A Scheduled Response cannot be submitted prior to the Scheduled Date when Auto Invoice is selected.

To respond to an SOW Schedule as a supplier, complete the following tasks:

1. Click the **View** menu and select **SOW Line Item**.

   Note: Another option is to select the desired SOW from **Statement of Work** and proceed to the **Characteristics** tab.
2. Click the **ID** link of the desired **Schedule**.
3. On the **Schedule**, click **Respond**.
4. Complete the **Setup** page by entering the **Final Terms** and **Comments** and adding **Adjustments** or **Attachments** if applicable.

   Note: **Final Terms** may be edited if auto-invoicing is permitted. The **Site** may be adjusted if the **Allow Supplier to specify Site on Line Item** rule is enabled on the SOW.
5. Click **Continue**.
6. On the **Review** page, ensure all of the details are correct. If changes are required, click **Make Changes**.

7. Click **Submit**.

   Note: The Schedule may be routed for approval if the buyer workflow for SOW Schedules is configured for approval.

Supplier Marks Event as Completed
Events are marked as completed by Suppliers.

To mark an Event as completed as a supplier, complete the following tasks:

1. Click the **View** menu and select **SOW Line Item**.

   Note: Another option is to select the desired SOW from **Statement of Work** and proceed to the **Characteristics** tab.

2. Click the **ID** link of the desired **Event**.
3. On the **Event**, click **Mark as complete.**
4. Complete the **Setup** page by entering or selecting the **Completed Date**, entering the **Final Terms** and **Comments** and adding **Adjustments** or **Attachments** if applicable.

   Note: **Final Terms** may be edited if auto-invoicing is permitted. The **Site** may be adjusted by the supplier if the **Allow Supplier to specify Site on Line Item** rule is enabled on the SOW.
5. Click **Continue**.
6. On the **Review** page, ensure all of the details are correct. If changes are required, click **Make Changes**.
7. Click **Submit**.

   Note: The Event may be routed for approval if the buyer workflow for SOW Events is configured for approval.

Supplier Creates a Fee
Fees are created by Suppliers.

To create a fee as a supplier, complete the following tasks:

1. Click the **View** menu and select **Statement of Work**.
2. Click the **ID** link of the desired **SOW**.
3. Select **Create Fee** from the **Actions** list.
4. Complete the **Setup** page by entering or selecting the **Effective Date**, selecting the fee **Name under Accounting** use the **Add Fee** link, entering **the Description**, **Units,** and **Comments**, and adding **Adjustments** or **Attachments** if applicable.

   Note: The **Site** may be adjusted by the supplier if the **Allow Supplier to specify Site on Line Item** rule is enabled on the SOW.

5. Click **Continue**.

6. On the **Review** page, ensure all of the details are correct. If changes are required, click **Make Changes**.

7. Click **Submit**.

   Note: The Fee may be routed for approval if the buyer workflow for SOW Fees is configured for approval.

Buyer Approves a Schedule, Event, or Fee
Buyer companies can be configured to require approval on Schedules, Events, or Fees.

Additionally, some organizations need to route the approval of schedules and events on an SOW to a specific user who is not the SOW owner. The Line Item Owner can be changed on individual schedules and events and when the supplier marks the schedule or event as complete, the item can route to the Line Item Owner for approval. Please refer to the Update Owner on Schedule or Event section above for additional information.

To approve a Schedule, complete the following tasks:

1. Click the **Work Items** menu and select **Approve** under **Schedule**.
2. Click the **ID** link of the desired **Schedule**.
3. Click **Approve.**
4. Complete the **Approve Schedule** dialog box, and enter **Comments**.

   Note: The **Cost Center** and **Task Code** may be selected at the line item approval if the company level configuration **Approver can specify Cost Center and Task Code on SOW Characteristics** is enabled.

5. Click **Approve**.

   Note: The approved schedule status may update to **Invoiced** if auto-invoicing is configured. If the supplier is required to create the invoice, the status is **Approved** and the **Next Step** is **Create Invoice (by Supplier)**.

To approve an Event, complete the following tasks:

1. Click the **Work Items** menu and select **Approve** under **Event**.
2. Click the **ID** link of the desired **Event**.
3. Click **Approve.**
4. Complete the **Approve Event** dialog box, and enter **Comments**.

   Note: The **Cost Center** and **Task Code** may be selected at the line item approval if the company level configuration **Approver can specify Cost Center and Task Code on SOW Characteristics** is enabled.

5. Click **Approve**.

Note: The approved event status may update to **Invoiced** if auto-invoicing is configured. If the supplier is required to create the invoice, the status is **Approved** and the **Next Step** is **Create Invoice (by Supplier)**.

To approve a Fee, complete the following tasks:

1. Click the **Work Items** menu and select **Approve** under **Fee**.
2. Click the **ID** link of the desired **Fee**.
3. Click **Approve.**
4. Complete the **Approve Fee** dialog box, and enter **Comments**.

   Note: The **Cost Center** and **Task Code** may be selected at the line item approval if the company level configuration **Approver can specify Cost Center and Task Code on SOW Characteristics** is enabled.

5. Click **Approve**.
6. **Note**: The approved fee status may update to **Invoiced** if auto-invoicing is configured. If the supplier is required to create the invoice, the status is **Approved** and the **Next Step** is **Create Invoice (by Supplier)**.

Supplier Creates an SOW Invoice

In certain scenarios, after specific payment characteristics are submitted and approved by the buyer, a supplier creates an SOW invoice to collect payment for those items.

The actions discussed below are completed by the supplier and are for buyer reference only.

Note: When suppliers are responsible for creating invoices, the **Auto Invoice** company configuration will not be enabled.

To create an invoice as a supplier, complete the following tasks:

1. From the **Create** menu, select **SOW Invoice** in the **Payments** section.
2. Click the SOW **ID** link for the desired site and item type.
3. Complete the **Setup** page.
   - Enter an **Invoice Code**. The invoice code is a unique number for the invoice and may relate to the supplier's internal invoicing system.
   - Select the items to include on the invoice by placing a check in the desired check boxes under Schedules, Events, Fees, Time Sheets, or Expense Sheets. To remove items, clear the related check boxes. Only approved items for the specific SOW are available for selection.

     Note: If **Single Line Item per Statement of Work Invoice** is enabled, the supplier can only select one item to be included on the invoice

9. Click **Continue**.

10. Complete the **Details** page of the SOW invoice.
    - Select **Adjustments**, if necessary.
    - Enter **Comments**, if desired.
    - Click **Add Attachments** to attach supporting documents, if desired.
11. Click **Continue**.
12. Review the SOW invoice.
13. Click **Submit**.

    Note: The SOW invoice is created and routed to the buyer for processing.