

SAP Fieldglass Services User Guide

Creating an Invoice & Fieldglass FAQ

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Terminology note: A **Statement of Work** is also known as a **Transaction Document**. This terminology is used interchangeably in the Fieldglass system and by McGraw Hill staff. Any reference to a Transaction Document also refers to the Statement of Work.

OVERVIEW

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

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

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

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

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

HOW TO INVOICE IN FIELDGLASS

Creating an **invoice** is known as creating a **Deliverable/Milestone or Fee**.

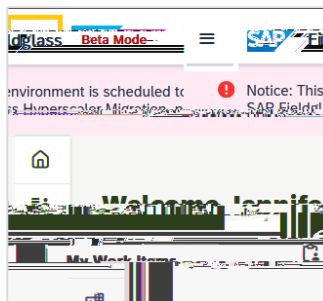
Fees can be generated for all or a partial amount of **Units**. If a partial amount is billed, additional invoices (Fees) can be submitted up to the maximum amount allowed in the SOW.

- Example: The SOW has 100 available **Units**. You may invoice for all 100 units as one Fee, or you may invoice 4 **Fees** of 25 units each.

A **Video Tutorial on Invoice Creation** is available [here](#).

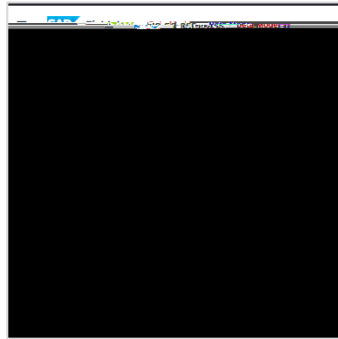
Deliverable/Milestone or Fee Creation

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





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



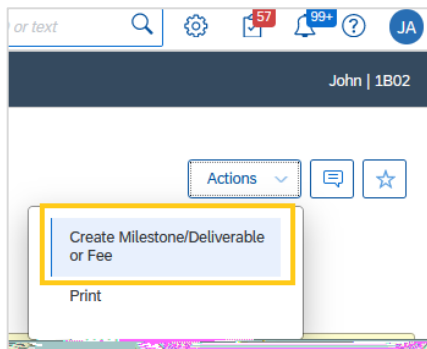
Items that are in the status **Approved** are active and ready for Fee creation.

Status	ID	Revision	Name
All	Enter Criteria		Enter Criteria
▼ Status: Approved (43)			
Approved	MHETQ00014474	0	Smartbook Assessment Item Quality Assurance and Fixes
Approved	MHETQ00014403	0	AH 2020.03.18

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

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

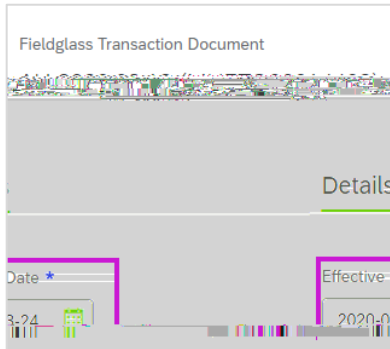
5. Click **Actions**. A menu will load.



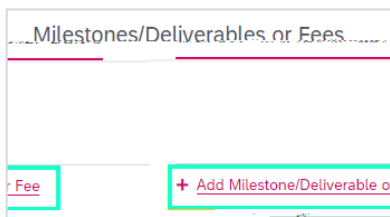
6. Select **Create Milestone/Deliverable or Fee**.



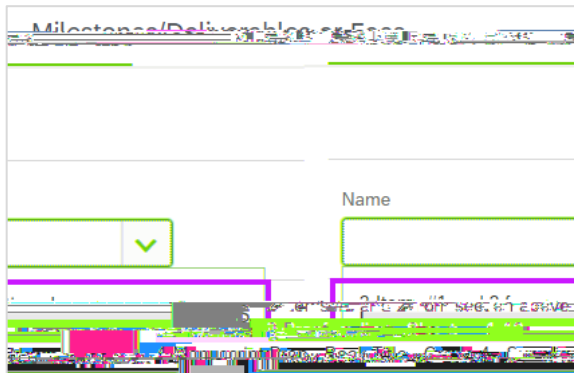
7. Enter the **Effective Date** of your invoice.



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



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



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

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





2. Click **Change Password** in the Account Information section. The Change Password dialog box is displayed.
3. Enter new password information, then click **Change**.

Updating Your Contact Information

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

1. Click on the people icon in the top right of the page. Select **My Profile**. The **Personal Settings** page will open, with the **My Profile** tab displayed.
2. Click **Edit** in the section where your name is displayed. The **My Profile – Basic Information** page is displayed.
3. In the **Email** field, enter the email address where all email notifications from Fieldglass should be sent.
4. In the **Cc: Email Addresses** field, enter any email addresses that should be included in the Cc: field of all Fieldglass notifications. Separate each address with a comma or a semicolon.
5. Click **Update** to save your changes.

Updating Your Fieldglass Preferences for Email Notifications

1. Click on the people icon in the top right of the page. Select **My Preferences**. The **Personal Settings** page will open, with the **My Preferences** tab displayed.
2. Click **Edit** to the right of **Locale** to change time zone.
3. Scroll down to **Messaging** section. Click **Edit**.
4. On the **My Preferences – Messaging** page, you may indicate whether you want **Notification, Work Item, Alert, Broadcast,geItem, Alert, BroadcaW*0 g0 G 0.02 Tc(4.)]Tp 0]#ETQq.0000092 0 62 792**



FIELDGLASS FAQ AT MCGRAW HILL

Q: I have forgotten my Fieldglass User ID and/or password, how do I retrieve?

A: The Fieldglass Helpdesk is the only party with access to assist. The Fieldglass Helpdesk is open



contact the AgileOne team at Agile1MHEBilling@agile1.com.
