INTERNAL
SAP Fieldglass

SAP Fieldglass Analytics

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Content

1 Analytics Overview

Several tools are available to help you report on and analyze the data within SAP Fieldglass. These tools are accessed from the **Analytics** menu.

Analytics Menu

The options available in the **Analytics** menu depend on company configuration settings and user permissions.

Option	Description
My Reports	Displays a list of user-specific custom reports. The **My Reports** landing page displays the top 12 reports that the user owns, has created, starred, or has run most recently. Searching from the landing page will search all of the user's reports, not just the top 12. Scroll to the bottom of the landing page and use the **Didn't find the report you're looking for?** link to access a full list of your reports. Reports for which the user is the Creator or Owner will display in this list. Reports starred by a user are also included in his/her **My Reports** list.
All Reports	Displays a list of all SAP Fieldglass reports (both user-specific custom reports and predefined reports), charts, pivots, and consolidated reports accessible by the user based on permissions.
Report Outputs	Displays a list of user-specific reports (scheduled or manually run) along with their run status. A download link is available for the previous two versions of executed (completed) reports. When a report is run again, the oldest version of the report is no longer available and the new version of the report is available for download.
Visualizer	A business intelligence dashboard available to buyer users that allows users to set filter conditions to analyze data.
PMO Dashboard	A business intelligence tool that displays a list of work items that are pending action and have a status of warning or critical. Alerts are based on thresholds that are set up by an administrator.

Option	Description
Data Dictionary	The Data Dictionary includes options that are helpful when designing custom reports. • The **Report Fields** option displays a list of data fields that can be used in custom reports and indicates in which module they can be found. • The **Formulas** option displays a list of fields that calculate data based on a formula. Formulas can be used in custom reports and are created by each buyer or supplier company. The SAP Fieldglass Support and Reports Team can assist with building formulas.
Create Report	Use to design custom SAP Fieldglass reports. Custom reports can be made accessible for public or private use.
Create Consolidated Report	Allows users to run multiple reports and pivot tables to a single Excel workbook.

Related Information

SAP Fieldglass Reports [page 6]
PMO Dashboard [page 46]
Visualizer [page 50]

2 SAP Fieldglass Reports

SAP Fieldglass enables buyers and suppliers to analyze data at a summarized or detailed level using predefined reports, custom reports, pivot tables, and charts.

Two types of reports are accessible in SAP Fieldglass: predefined reports and custom reports. Predefined reports are reports that are set up by SAP Fieldglass and made available to users based on permissions. Custom reports can be created by users with proper permissions for private or public use.

A master list of data fields is provided when creating custom reports. You can also create new fields using formulas. Creation of reports begins with selecting a base module from which to extract the data. Once the data source is selected, users can add or remove data fields, apply filters to limit the data retrieved, and change the way columns display. Output formats include XLS, XLSX, CSV, CSV Data Only, PDF, and Data View.

Related Information

Report Administration [page 6]
Data Dictionary [page 12]
Viewing Reports [page 15]
Creating Reports [page 20]

2.1 Report Administration

Report administrators are responsible for managing access to reports and system data by using user role permissions and other administrative tools.

For example, visibility to reports is determined by placing reports within folders, then assigning user roles to these folders. In addition, access to specific reporting features are assigned via the user profile.

Report administrators also play an important role to support end users. They often own tasks such as managing predefined reports, publishing reports to users' home pages, and assisting with troubleshooting.

2.1.1 Reporting User Role Permissions

Role-based permissions for reporting are controlled via the **User Role** option in the **Admin** menu.

Users work with reports differently depending on their role. For example, hiring managers may run predefined reports or create reports for themselves. Other users, such as administrators, may create reports and make them available to the organization.

To give a user role permission to edit and remove existing reports, as well as move reports between folders, select the check box in the **Manage** column for the **Reports** user permission. Then, in the **Others** column, select additional reporting actions this user role can take within SAP Fieldglass. Descriptions for available options are listed below.

> **i** Note
>
> User permissions can also be set for reporting. For example, you can set which users have access to sensitive data. In addition, Advisor user role permissions can be set.

This option...	Gives the user role permission to...
Add Excel Template	Attach an XLSX template to reports. XLS and XLSM formats are not supported.
Formula Field	Create new formulas.
Consolidated Report	Create new consolidated reports and access the completed or pending runs in the report output list.
Default Report Fields	Add or remove default reporting fields per base module.
Define	Create reports or copy existing reports. If **Define** is selected and **Publish** is not selected, the user role can only create reports for themselves.
Edit Predefined Reports	Access the predefined reports list. From this list, users can inactivate, rename, set a new category for, or add a description for predefined reports.
Execute	Run reports. This permission only allows the user to run the report as designed. (Users can change filters on reports.)
Publish	Create publicly available reports (as opposed to private only).
Publish to Supplier	Publish reports to one or more suppliers. This option is available if the **Allow Buyer to Publish Report to Supplier** company configuration is enabled.
Schedule Report	Create schedules and download completed scheduled outputs.
View Report Audit Trail	Access the report audit trail, which tracks all reports run within the company.

Administrative User Role Permissions

This option...	Gives the user role administrative permission to...
Report Folder	**View:** Access the **Report Folder** entity in the **Admin** menu. **Manage:** Create folders in **Analytics** > **All Reports**.

Related Information

Reporting User Permissions [page 8]
Advisor Permissions and Visibility [page 42]

2.1.2 Reporting User Permissions

Some user permission settings in **Admin** > **User** determine how an individual can access reporting data. For example, access to archive and secure data is controlled with user permissions.

> **i** Note
>
> When access to a report field is controlled by a user details flag, even administrators need the flag enabled to add the field to reports. Administrators can see the full report field list regardless of how user details flags are set.

Field Name	Definition
This User can act as Coordinator/Distributor	This option displays for MSP-enabled companies. When selected, the user can: • Add MSP or supplier fields to reports • Access the **Archive** setting for a data source (this setting is always visible to administrators) • Filter for invoices in draft status
Feature Access	**View and Report on Sensitive Data:** This setting controls access to security ID, security information module custom fields, and custom fields that store data encrypted. The logged in user can't change this flag setting for his own account. When selected, the user can: • Report on Security ID when the **Display Security Information Masked** company configuration is enabled. • Report on custom fields from the security information module. • Report on custom fields that store their data encrypted. **Use PMO Dashboard:** Select to give this user access to the PMO Dashboard. **Use Visualizer:** Select to give this user access to Visualizer. **Set Run As User:** Select to allow this user to retrieve the same results as any other user in the company, including administrators. If the user running the report does not have permission to **View and Report on Sensitive Data**, he/she cannot see sensitive data if the user selected in the **Run As User** field has this permission enabled.

Related Information

Reporting User Role Permissions [page 6]

2.1.3 Predefined Reports

SAP Fieldglass predefined reports are reports that are automatically present in a buyer or supplier company when the company is created. They are designed to capture system data that users are often interested in seeing in a report format.

> **i** Note
>
> Reports that are published from another company are also included in the predefined reports list.

The specific predefined reports available in a company may depend on particular company configuration settings. Each predefined report is assigned to a report folder.

Users with the **Edit Predefined Reports** user role permission enabled can use the **Predefined Reports** option in the **Admin** menu to update predefined report names, folders, and descriptions. If desired, predefined reports can also be inactivated using this option.

2.1.4 Report Folders

Report folders allow you to group related reports together. SAP Fieldglass provides several default report folders.

Administrators can create additional report folders, associate them to user roles, and utilize the new folders when creating new or editing existing reports.

Setting Report Visibility Using Folders

Folders managed in **Admin** > **Report Folder** are shown in the **All Reports** list. If you have the **Reports** > **Manage** user role permission, you can move reports between folders in the **All Reports** list. To move a report into a folder, drag it from the list view (in the right pane) to the folder in the left pane. A report can only belong to one folder.

If you have the **Report Folder** > **Manage** user role administrative permission, you can create folders in the **All Reports** list.

To create a new folder:

1. In the All Reports list, click **Add** in the **Folders** section in the left pane.
2. Give the folder a name and description.
3. In the **User Roles** section, select the user roles to which you would like to provide visibility to the folder.
4. Click **Add**.

To edit or remove a folder:

1. Click the folder name.
2. Click the pencil icon at the top of the right pane.
3. Edit the folder information or click **Remove** to delete the folder.

> **Note**
>
> You cannot delete a folder if reports are associated to the folder.

Related Information

Using Filters and Folders in the All Reports List [page 17]

2.1.5 Report Default Fields

Use report default fields to streamline the process when creating new reports in SAP Fieldglass.

Default fields identify the columns and filters that are most commonly used when creating new reports and are included by default when a user creates a new report.

When creating a report for a specific module, SAP Fieldglass includes the ten fields that are most commonly used by users. These ten fields are the default columns for new reports for that base module. Users with the appropriate user role permission can edit this list by adding or removing default fields. When a user creates a new report for the base module, individual default fields can be removed and additional fields can be added by the creator.

> **Note**
>
> The three filters that are most used when creating a report for a specific module are defined as the default filters for that module. A default filter does not need to be specified in the list of report default fields.

To update the default fields for a module, click the module name in **Admin** > **Report Default Fields,** then click **Edit**.

Field Definitions

Field	Definition
	Drag the fields up or down the list as desired. The order in which the fields appear in the list is the order that they will display in new reports created for this base module.
Module	The base module to which this list of Report Defaults applies. When a new report is created in this Module, these Report Default fields and filters will be automatically included.
Category	The category in which this field is included.

Field	Definition
Field Name	The name of this field.
Column	If the check box in this column is selected, this field is automatically included as a column in the report when a new report is created for this base module. To add a field that is not already included in the list, click **Add Fields** and select the field(s) you want to add. When you add a new field to the list, the field is automatically selected as a default report column. To remove this field as a default column, clear the check box. To remove a field from the list (that is, it should not be included as either a column or a filter), click the **x** on the right side of the row.
Filter	If the check box in this column is selected, this field will be automatically included as a filter when a new report is created for this base module. To add a field that is not included in the list, click **Add Fields** and select the field(s) you want to add. When you have added a new field, you must select the appropriate check box to include the field as a default filter. To remove this field as a filter, clear the check box.

2.1.6 Report Headers and Footers

Administrators can create a global header and footer using the Report Footer and Report Header options in **Admin** > **Custom Text**.

The global header and footer are shown on all reports (except CSV) that have no report-level headers and footers defined. Report-level headers and footers override the global versions. If no report-level header or footer exists for a report, the global header and footer are used.

To create a global header or footer, choose **Report Header** or **Report Footer** from the **Section** drop-down list for the custom text, then click **Edit** to edit the text. Type the text to display in the report header/footer, then click **Update**.

2.1.7 Adding Reports to Users' Home Pages

Admin users can associate reports or charts to individual users or multiple users at one time based on user role.

When a report is associated to a user, it displays on the user's Home page. When a report is associated to a user role, it displays on the Home pages of all users with that role.

Up to ten reports or charts can display on a user's Home page. Users cannot remove reports from their Home pages that have been associated to them by an administrator.

To associate a report to a user or user role:

1. Go to **Admin** > **User** (to associate to an individual user) or **User Role** (to associate to a user role).
2. Choose a user or user role from the list.
3. Choose the **Reports and Charts** link in the associations list in the left navigation pane.
4. Choose **Add**.
5. Search for the report to associate, select the report, then choose **Add**.
6. Set filter options for the report, if necessary, by clicking the edit icon for the report in the list. Additionally, you can drag reports up or down to display them in the desired order on the Home page.

2.1.8 Report Audit Trail

The report audit trail is accessed in **Admin** > **Report Audit Trail** and displays a list of reports/charts that have been run.

Columns in the audit trail indicate who ran the report/chart, the name of the report/chart, the output formation and the time of the report execution.

Field	Definition
Period	Select a date range for the audit trail you wish to view.
Executed By	The name of the user who executed the report.
Report Name	The name of the report.
Output Format	The output format of the report.
Time	The date and time the report was executed.

2.2 Data Dictionary

The Data Dictionary is a helpful tool for designing custom reports. It contains two elements that will aid you in selecting data fields: The report fields list and the formula list.

The report field list allows you to view a list of data fields that can be used in SAP Fieldglass reports. This is useful in determining in which module a data field resides to help select the appropriate base module for a custom report. Additionally, it may also serve to save time searching for a data field in multiple modules during the report creation stage.

The formula list contains a global list of formulas that have been created in your company and can be added to any report. You can also create new formulas from this list.

> **i** Note
>
> Private formulas can also be created for specific reports on the Create/Edit Report page. These formulas are not shown in the formula list and cannot be shared between reports.

Related Information

Report Fields List [page 13]
Formulas [page 13]

2.2.1 Report Fields List

To view a list of reporting fields, choose **Analytics** > **Report Fields**.

To search for a specific report field, type the field name in the **Data Field Name** field and click **Filter**, or click the column headings to sort the list.

Tips for sorting and locating report fields:

- Click a column heading to sort the list. For example, click the **Category** column heading to sort report fields by category.
- The text boxes in the column header allow a free-text search. Click **Filter** after typing to filter the results. For example, type **invoice** in the **Data Field Name** field then click **Filter** to filter fields that contain the word "invoice" in the field name.
- To view fields recently added to SAP Fieldglass, choose **Yes** from the **New?** drop-down list.
- To view summary fields (fields that combine one or more rows of data to output a single row), choose **Yes** in the **Summary?** drop-down list.

2.2.2 Formulas

If the fields provided in the SAP Fieldglass data dictionary do not include all the fields you require, you can create a new field using a formula that is based on existing fields while using standard functions and operators.

Formulas have many uses, such as outputting a static value in every row, performing math on numeric fields, finding the time difference between two date fields, or concatenating two or more text fields.

Formulas are created by SAP Fieldglass users. Like native report fields, formulas have a name, module, category, and data format.

> → Tip
>
> Formulas have some limitations, such as that encrypted fields may not work correctly. Encrypted fields include security ID, activity and offboarding activity custom fields, security information custom fields, and optionally other fields. Summary fields also may not work correctly with formulas. Summary fields can be identified by the sigma (Σ) icon on the design time page of a report. The Reports team can provide guidance or assist with building formulas.

All SAP Fieldglass administrators can create formulas. Only users with the **Formula Field** user role permission enabled can create new formulas.

To access the formula list, choose **Formulas** from the **Analytics** menu. Use the drop-down fields or click the column headings to sort the list.

Field	Description
Module	The base module from which the field pulls data.
Category	The category of the field.
Data Field Name	Click the link in this column to view field details or edit.
Description	The description for the field.

Creating Formulas

To create a new formula, click **Create Formula** on the formula list view page. The process of creating a formula begins with selecting a module in the **Module** field, which then filters the list of fields available for building the formula. For best results, the base module of the field should be the same as the base module of the report(s) on which the field is used.

There are several ways to navigate the field list in the left navigation pane.

- Expand the sections to reveal the applicable fields within.
- Type a keyword in the search field at the top of the list to find fields that include the keyword in the name or description.
- Choose an icon at the top of the list to filter fields by data type, such as date or number.

Once you have located a field, drag it into the **Formula** area to add it to your formula.

Similar to fields, functions can also be dragged into your formula. To do this, first select the type of function you'd like to use in the **Type** field to display the applicable functions. Then drag the function from the **Function** field into your formula. The **Sample Function** area of the page defines the selected function and provides examples of its use.

Clicking the tabulate icon  tabulates the formula so it can be more easily read and understood. Click **Validate** to check the formula. A message displays under the **Formula** area to indicate if the formula is valid or invalid.

When you are finished creating the formula, complete the fields in the **Details** section (listed below), then click **Save**.

Field	Description
Field Name	Type a name for the formula. It is recommended to add a prefix before the field name (such as **FOR_**) so it can easily be identified in lists as a formula.
Field Description	Type a description for the formula. Consider adding the formula into the description so other users know what results to expect when adding the field to the report. This also helps the SAP Fieldglass support team troubleshoot if necessary.

Field	Description
Output Data Format	Select a output data format for the new formula. Options include **Text**, **Boolean**, **Date**, **Number**, and **Percentage**.
Category	Select a category for the new formula. This field serves to better define the nature of the formula when selected for use within a report.

Related Information

Reporting User Role Permissions [page 6]

2.3 Viewing Reports

Reports, pivot tables, charts, and consolidated reports are accessible via the following lists in the **Analytics** menu: **My Reports**, **All Reports**, and **Report Outputs**.

There are two ways to view report data in SAP Fieldglass: Run or schedule.

- Run Reports: Predefined and custom reports that are set with the access options **Public and Editable**, **Public but not Editable**, and **Private** can be executed on demand by navigating to the report run screen directly from the report lists, at which time any required filter criteria can be defined and the report executed. You can then open or save the report. Options to open or save the report are based on the output format selected on the report run screen and your operating system or web browser.
  SAP Fieldglass predefined reports with the access option **Public Run Only** can only be viewed or run. The design of these reports cannot be edited by users. Only an SAP Fieldglass administrator can modify and maintain these reports.
- Schedule Reports: Reports that are scheduled to run can be downloaded from the **Report Outputs** list and viewed in the format defined in the report parameters. Schedules, filter criteria and the output format for scheduled reports are set during report design.

Related Information

Running Reports from the All Reports List [page 16]
Viewing Recently Run or Scheduled Reports [page 18]

2.3.1 Running Reports from the All Reports List

To run a report from a list of all reports available to you, click **Analytics** > **All Reports** to access the **All Reports** list.

To search for a specific report in the **All Reports** list, use the provided filters and folders in the left navigation pane. You can also enter the appropriate search criteria below a column heading and click **Filter** or click the column headings to sort the list.

Once found in the list, click the report name, then choose filter and formatting options (described in the table below) before clicking **Run**. The report is displayed or saved in the selected file format. Options to open or save the report vary based on your operating system, web browser, and the report output options that were selected.

Run Report: Filter, Format, and Output Options

Field Name	Definition
Filter Sets	If legacy filter sets exist, they are available to select in this field.
Run As User	Select a user to view the report data as if the person had executed the report themselves. The ability to use this feature set via the **Set Run As User** user permission.
Data Source	Determines the database from which the report data is being pulled. • **Latest** displays only data that has not been moved to the archive database for the reporting tool. • **Archive** displays only data that has been moved to the archive database for the reporting tool. **i Note** Data older than 24 months is moved to the archive database. Data archiving helps to improve application performance by limiting the size of the data set accessed during queries. You cannot report on latest and archive data within the same report.
Show Data For	Determines the set of data that displays in the report. • **All** displays all report data that a user has access to, based on user permissions. • **My Own** displays report data where the user is linked to the data in some way, such as the creator, owner, supervisor, coordinator, or distributor. • **My Group** displays report data included in the user's My Own view plus data that the user has been given My Group access to. • The **My Hierarchy** option displays if the user is in a role that has the **Hierarchy Visibility** flag enabled. When selected, the report includes data for the user and the user's subordinates. • The **Owner** option displays if the user is in a role that has the **Hierarchy Visibility** flag enabled. When selected, another drop-down displays with a list of the users that report to the logged in user. Choose a user to view report data for the specific user.

Field Name	Definition
Output Format	Determine the file type of the report. Standard output options include: • **XLS**. Microsoft Excel spreadsheet. • **XLSX**. Microsoft Excel spreadsheet. • **CSV**. Comma separated values. • **CSV Data Only**. Report does not include column header information, only the data. • **PDF**. Adobe Acrobat PDF format. • **Data View**. Displays the report in columns and rows within SAP Fieldglass. When a report has been generated in the selected output, the file can be saved or opened.
Font Name/Size	Sets font options.
Page Orientation/Size	Sets page layout options.

Related Information

Using Filters and Folders in the All Reports List [page 17]
Viewing Recently Run or Scheduled Reports [page 18]
Reporting User Permissions [page 8]

Using Filters and Folders in the All Reports List

Filters and folders can be used together to limit search results in the **All Reports** list.

Using Filters

Click any of the filters in the **Filters** section in the left pane of the **All Reports** list to quickly filter the report list. All users have access to filters, which are described below.

- **All Reports**. Displays all reports to which you have access. This filter is the default view.
- **My Reports**. Displays a list of reports that are starred or owned by you. My Reports also includes the last 25 reports you have run.
- **Published Reports**. Displays reports that are either predefined or published from another company.
- **Past Reports**. Displays reports that have not executed or edited in 13 months.

Using Folders

Reports in the **All Reports** list are categorized using folders. The **Folders** section in the left pane displays the report folders you have permission to see. Users in your organization with permission to manage report folders can make folders (and the reports within them) available to you.

The default view displays reports among all folders. To view the reports within a folder, click the folder name in the left pane.

Related Information

Report Folders [page 9]
Running Reports from the All Reports List [page 16]

2.3.2 Viewing Recently Run or Scheduled Reports

Recently run or scheduled reports can be accessed and downloaded from SAP Fieldglass. Based on the user's **Set Run As User** permissions, other users' reports may be available.

To view a list of recently scheduled and executed reports, click **Analytics** > **Report Outputs**. The **Report Outputs** page lists all scheduled and executed reports to which the user has visibility. To view reports run or scheduled within a different date range, select the new dates and click **Filter**. Use the **Group By** field to group reports together by user or type, for example.

To view report output for a specific report, open the report's **Details** page and click the **Previous Runs** tab. The last two runs of a report within the last 90 days are shown. Items are deleted after 90 days. If the user does not have permission to view the last report runs, no results are shown.

Report Outputs List: Field Descriptions

Field descriptions for the **Report Outputs** page are listed below. These fields are also shown on the **Previous Runs** tab.

Field	Definition
Status	The run status of the report. • **Pending**. Reports that are scheduled to run on a future date and/or time. • **Completed**. Reports that have run according to schedule and are available for download. • **In Progress**. Reports that are currently running. • **Error**. Reports that were unable to execute or produced errors during the run process.
Name	Click the link to view report **Details** page. Updates to the schedule can be made by choosing **Schedule Report** from the **Actions** menu.
Schedule Name	If the report is a scheduled report, the name of the schedule displays in this field.
Folder	The report folder to which the report belongs. Report folders are defined and managed by an administrator and help control user visibility to reports.
Type	The type of report. Choose an option to filter the list by report type: **All**, **Bar**, **Column**, **Consolidated Report**, **Consolidated Report (Scheduled)**, **Line**, **Pie**, **Pivot**, **Report**.
Executed By	The user who ran the report.
Schedule/Executed On	The date and time on which pending reports are scheduled to run, or the date and time on which completed reports were executed.
Delivery Type	The delivery type of the report. • **URL**. A Universal Resource Locator provides a link to the file location on the internet. • **Attachment**. Reports with this delivery type are delivered as an attachment. Attachment type outputs are limited to 5 MB in size. If attachments are larger than 5 MB, the report is delivered as a URL.
Action	The available action according to the status of the report. Reports that have a status of Pending have no associated action. Click **Download** to download and view the report.
Scheduled	If the report was run via a schedule, **Yes** displays in this column.

Related Information

Scheduling Reports [page 36]

2.4 Creating Reports

Creating custom reports is an administrative function that allows users with proper permissions to design new reports and customize the data output.

Users with the user role permission **Reports: Define** can create private reports. Users must also have the **Reports: Publish** permission enabled in order to create public reports.

Report design is a multi-step process that begins with selecting the SAP Fieldglass base module that contains the data fields used to create report. After the module is selected, SAP Fieldglass takes you through the steps to design the report.

To create a new report, choose **Analytics** > **Create Report.**

Related Information

Before You Begin [page 20]

2.4.1 Before You Begin

It is a good idea to take some time to plan your report before you create it in SAP Fieldglass.

Prior to creating a report, it is recommended create a rough chart of the fields or values you wish to use. Also, it may be worth considering how the data should be represented or organized and whether this would be best presented in a standard report, a pivot table, or a chart. When creating pivot table reports, each row will act as a hierarchy for how the data points will then be presented. This may be useful for grouping data.

For a standard report, the data may be grouped by specific fields in a similar way using groups. This will organize the data as determined by the field(s) used in the group.

You can base the creation of a report off of an existing report, as this may help you to avoid some of the pitfalls during the report design. You can also copy a report by opening the run time page of an existing report and choosing **Actions** > **Copy Report**.

> ⚠ Caution
>
> It is not recommended to copy an SAP Fieldglass predefined Report to create a new report. Some predefined reports contain custom report fields that won't work properly in other reports that have a different base module or structure.

Important Design Questions

- What is the goal of the report? What data is essential?

- What is the minimum number of columns that would provide the information you require? What information is nice to have but non-essential?
- Are there any existing reports that approximately serve the same purpose? (These may be used as a template for design or may be refined.)
- Is the report overly complex? If the report is attempting to accomplish too much, it may better to create multiple reports to accomplish the goal. Alternatively, the goal may not be well-defined.

2.4.2 Selecting the Base Module

The first step to create a report is to select the base module. The base module is a starting point for the report and ensures the fields available to add to the report are those that will work well together.

For example, in a report containing invoice and time sheet fields, selecting **Invoice** as the base module would pull in data only for time sheets that have been invoiced. Using the same fields and selecting **Time Sheet** as the base module, the user could see data for time sheets that were not yet invoiced, such as those that are pending approval.

The base module also determines the default fields added to the report. The default fields are the most commonly used within the company and are defined in **Admin** > **Report Default Fields**. Although selecting the base module is the first step to create a report, it can be changed later if needed.

> **i** Note
>
> The data retrieved from a data source includes both Contingent and SOW data. For example, a report created from the Time Sheet module will include time sheets for both Temp and SOW Workers. Filters can be added to the data view to limit the data that is included.

When creating a report, you are prompted to choose a base module from a list of tiles. Tiles are organized in two sections: **Popular Modules** and **Other Modules**. The **Popular Modules** section provides quick access to common modules. You can also search for a different module in the **Other Modules** section or browse through modules using the carousel. Click a tile to create a new report.

Tips for Selecting a Base Module

- The Work Order module can pull draft or pending approval work orders, but reports with a Worker base module can only pull workers who have registered.
- Statement of Work contains summary data, including budget fields.
- Statement of Work Detail contains information related to the line items on an SOW.
- Activity and Offboarding Activity is an administrative module. To report on whether a specific worker's onboarding items are complete, use a transactional base module (e.g. Worker).

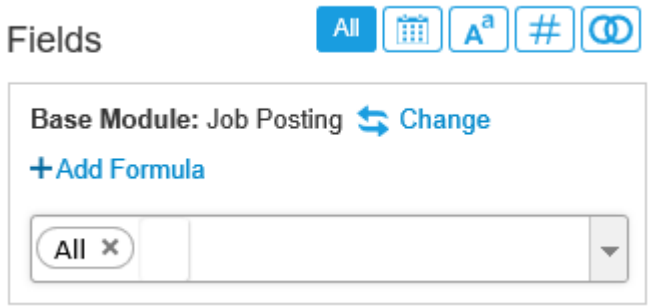
Related Information

Changing the Base Module of a Report [page 22]

Changing the Base Module of a Report

You can change the base module of a report during the report create or edit process.

To change the base module, click the **Change** link next to the base module in the left pane.



When changing the base module of the report, you have three options:

- Make no changes to the existing fields and filters.
- Remove existing fields and filters and add default fields and filters from the new base module.
- Add default fields and filters from the new base module to the existing fields and filters.

After choosing an option and clicking **Make Changes**, the **Create Report** page refreshes with the new or updated information.

If you chose to keep the fields and filters from the previous base module, once **Continue** is clicked, an error message displays if any of the fields or filters from the previous module do not apply to the new module. The error message lists the fields that must be removed. You cannot continue creating the report until the listed fields are removed.

2.4.3 Selecting and Configuring Data Fields

Data fields determine the columns that display in a report as well as the structure and the arrangement of the report. At least one field is required on every report.

A field can be defined as a **column**, **filter** or **group**. When defined as a column, most fields pull data into one new column of the report, but some fields can cause more than one additional column to display.

When creating a report, default data fields are already added to the report design. These fields are defined by module in the **Report Default Fields** admin object. Default fields save the report creator time; commonly-used data fields for the selected module are already included so the fields do not have to be added to the report manually. Default fields can be removed, added to, or altered to achieve the desired results.

Summary fields combine one or more rows of back end data to output a single row of data on your report. For example, **Invoice Amount** is a summary field that combines Invoice Line Item Amount + Invoice Tax/Adj Amount. Summary fields are indicated with a sigma (Σ) icon.

Related Information

Selecting Data Fields [page 23]

Selecting Data Fields

Select the data fields to include in your report by adding or removing fields as needed on the **Create/Edit Report** page.

Drag and drop fields from the left navigation pane into the **Columns** area to add it as a column to your report.

Use any of the methods below to locate a data field in the left pane:

- Expand the report categories to reveal the fields within.
- Type a keyword in the search field at the top of the list to find fields that include the keyword in the field name.
- From the drop-down list, filter to show **All** or **Linked** fields. All fields shows all fields that are related to the base module of the report. Linked fields allow you to report on attributes of related fields, such as supervisor and approver fields.

Configuring Group Options

Groups can be added to organize report data by specific fields. For example, invoice data could be grouped by cost center so that all invoices for a specific cost center display together in the report. Groups are not required to create a report.

To group data in your report, first add the field you want to group by.

Drag and drop the field from the left navigation pane into the **Groups** area. To add metrics for a grouped field to your report (such as **Count** or **Sum**), click the down arrow icon then choose an option in the **Summary Function** field. Any fields with the **Summary Function** set will be totaled by the group and a grand total will be available.

For example, to see invoice amount submitted by month in the new reporting UI, first drag the **Invoice Submit Date** field to the **Groups** area. Then, set the **Summary Function** to **Sum** on **Invoice Amount**.

Configuring Report Columns

The data fields you have selected are shown as columns in your report and can be configured.

When creating or editing a report, columns on the report are listed in the **Columns** section. Use the fields in this section to rearrange, rename, and sort the columns in the report. You can also use features in this section to change the way information outputs in the report.

Field/Item	Definition
	Click to change the position of the field on the report. Click and drag the field to the desired location.
	Click to expand the field attributes. The following attributes can be set for fields (the available attributes depend on the field type): • **Summary Function**: Use to summarize or total information. For example, use for numeric fields to obtain values such as sum, average, or totals. Use this attribute to count fields that are not numeric such as a headcount of workers. • **Function**: Use to change the way a field outputs, such as day of the week (for example, Monday) instead of a date field's numerical value. • **Column Width %**: Set column width for applicable formats, such as PDF. • **Suppress Duplicates**: Use to suppress duplicate values that would pull for the column. This is advantageous when you are attempting to perform a headcount of workers, for example. • **Suppress if Zero**: Use to suppress zero values that would pull for the column. • **Word Wrap**: Select to word wrap for applicable formats, such as PDF.
Module	The SAP Fieldglass module to which the field is linked.
Data Field Name	The name of the field in SAP Fieldglass.
Display Name	The field name as it appears on the report. You can type in this field to change the display name.
Sort Order	Allows you to indicate whether the data in the field should display in ascending (**ASC**) or descending (**DESC**) order on the report.
	Removes the field from the report. Clicking this icon in the column header removes all the fields at once.

Related Information

Using Functions [page 24]

Using Functions

A field's **Function** value configures the way it displays in the report output. For example, you can use **Function** to configure a date field to display the day of the week (Monday) instead of the numerical value.

Formula	Description
Text Fields	

Formula	Description
Sub String	Indicates the portion of the field to display. Provide the position to start with and then indicate the number of characters to display. For example, if you enter 3 in the first box and 8 in the second box, the field will start with the 3rd character and display 8 characters.
Left	Indicates the number of characters from the left that should display.
Right	Indicates the number of characters from the right that should display.
Date Fields	
Day of Week	The day of the week displays instead of the numerical date, for example, Monday, Tuesday, etc.
US Week	The week number (where the week containing January 1 is the first week of the year).
EU Week	The week number (where the week containing the first Thursday of the year is the first week of the year).
Month	The numerical month displays instead of the entire date.
Month Name	The month displays instead of the numerical date, for example, January, February, etc.
Quarter	The numerical quarter displays instead of the entire date.
Year	The year displays instead of the entire date.
Date	The date displays only.
Day	The numerical day of the month displays only.
Time	The time displays only.

Adding Totals to Reports

You can design reports that summarize or total information. Reports can total numeric fields (such as an **Invoice Amount**), or count fields that are not numeric, such as obtain a headcount of workers. Averages, maximum, and minimum values can also be displayed on reports.

There are two common methods for summarizing information on reports:

- Display a grand total of a field at the end of a report.
- Group data, then display totals within groups. For example, you can group a report by **Cost Center**, then display the total **Invoice Amount** per cost center.

To add a grand total to a report, set the **Summary Function** on the field. For example, to show the total **Invoice Amount**, first add the field to the report, then set the **Summary Function** on the field to **Sum**.

If you are using groups in your report, you can also display totals per group, which also includes a grand total at the end of the report. To do this, drag the field to the **Groups** section.

Below are the available options in the **Summary Function** field.

Summary Function	Description
Count	The number of rows displayed.
Distinct Count	The count of the unique values for the column.
Sum	The sum of the value for the column.
Average	The average value for the column.
Maximum	The maximum value for the column.
Minimum	The minimum value for the column.

→ Tip

Counting, Summing, and Averaging values in fields can be useful in combination with either the **Suppress Duplicates** or **Suppress by Zero** options. Selecting **Suppress Duplicates** prevents duplicate information from being returned in a field on your report. This is particularly advantageous when you are attempting to perform a headcount of workers, for example. In this case, you can set the **Summary Function** to **Count** on **Worker ID**, then select **Suppress Duplicates** in order to make sure the count is accurate.

Related Information

Configuring Group Options [page 23]

2.4.4 Filtering Reports

Use filters to narrow the report results by specifying a subset of data to display in the report. For example, invoice data can be limited by status to report on only invoices with a status of Paid. Certain data fields have default filter types that cannot be changed.

Filter types play a major role in the data that displays in a report. For example, when approval fields are added as a column in a report, the **Approval Fields** scope filter is also added. The scope filter can be set to either **Separately**, **Last Approved Item**, or **Last Item**. When set to **Separately**, each approval action is displayed as a separate row in the report. A time sheet that was rejected and then approved would have two rows of data. A work order revision with three levels of approval may have three rows of data. If amount fields are included in the report, the **Last Approved Item** or **Last Item** options are recommended. These options display only one row of information (**Last Approved Item** displays the most recently approved action and **Last Item** displays the final approval action). When the scope filter is set to **Separately**, the amount will be included once for each individual approval action. A time sheet that was rejected and approved would display an amount that was twice as big as the correct amount when the scope filter is set to **Separately**.

The **Add Compare Filter** and **Add Top X Filter** links allow you to add these types of filters to the report. Use a compare filter to compare data between two fields on a report. If the report includes invoice information, you

can also use a top X filter to report on frequently-used business units, cost centers, sites, and suppliers based on invoice amounts.

Using Filter Conditions

Filter conditions vary, depending on the data field. Example filter conditions include: Between, Not Between, Equals, Does Not Equal, etc. When you add filters to your report, you set the filter conditions to use for each field. For example, you select a date range for a date field.

If the field displays a **Select** button, click **Select** to choose items from a list. These will be the only items available for filtering when the report is run.

If the field displays a **Preselect** button, click **Preselect** to select the items that will be highlighted in the filter list. This is helpful in cases where, for example, you always select five business units out of ten when running a report. You can preselect those five business units to save you time. Different business units can always be selected when the report is run.

Additional options can also be used to determine which options are available to users when the report is run.

Choosing the blue gauge icon  displays only the items you have selected. Choosing the gray gauge icon  gives the user access to all items.

> → Tip
>
> You can lock a filter condition to make it read-only on the report. This prevents a user from changing the filter values on the report run page. To lock a filter condition, click the lock icon  .

Selecting Report Filters

To add a filter to a report, click a field in the left pane and drag it to the **Selected Filters** section.

To edit the filter logic, click **Edit** and update the expression using AND and OR logic. Once the filter logic is set, update the filter conditions for each field.

Related Information

Compare Filters [page 28]
Top X Filters [page 28]

Compare Filters

A compare filter allows users to select two fields and display data compared between them.

For example, you may want to create a report that shows only job postings where there are still positions available to hire a job seeker against. In this example, a compare filter could be defined to show only job postings where the number of positions requested is greater than the number that have been hired for the job posting. Only job postings where there is at least one position still available to fill would be displayed in the report.

To add a compare filter, click the **Add Compare Filter** link when creating a report.

Enter the requested information on the Add Compare Filter dialog box. When finished, click **Add** to add the filter to the report.

Field	Definition
Data Type	Select the data type you wish to compare. Options include **Text**, **Number**, **Date Difference**, and **Yes/No**.
First Field	Select the first field to use in the comparison. Fields available are based on the data type selected.
Filter Condition	Select the filter condition for the comparison. Options include **Equals**, **Does Not Equal**, **Greater Than**, **Greater Than or Equal To**, **Less Than**, and **Less Than or Equal To**.
Second Field	Select the second field to use in the comparison. Fields available based on the data type selected.

Top X Filters

A Top X Filter allows users to report on the Top "X" performers related to invoices, where X equals a value defined in the filter parameters. These parameters include Business Units, Cost Centers, Sites, and Suppliers. Top X filters can only be used for invoice information.

To add a compare filter, click the **Add Top X Filter** link when creating a report. Select the fields that you want to use for the Top X filters, then click **Add**.

When finished, click **Add** to add the filter to the report. Enter a value in the **Top** field.

2.4.5 Defining Report Details & Saving Reports

Define report details and access settings upon saving the report.

Report details are displayed in the All Reports list and are used to search for reports in the report list. Details include basic information such as the report name, the folder, a description, and user access, as well as default values used within the report parameters when executing a report, such as formatting and display options.

Complete the setup fields for the report, as described in the table below. Some options are defined in the Create Report page, and others are set on the report run page when running the report. When finished, click **Save** to save the report.

Field Name	Definition
Output Format	Select the default output format. This option can be changed by the user when the report is executed: • **XLS**. Microsoft Excel spreadsheet. • **XLSX**. Microsoft Excel spreadsheet. • **CSV**. Comma Separated Values. • **CSV Data Only**. The report does not include header information, only the data. • **PDF**. Adobe Acrobat PDF format. • **Data View**. Displays the report in columns and rows within SAP Fieldglass.
Name	Enter a name for the report. This field is searchable when searching for reports from the report list.
Header	Enter any text that you want to display in the report header. If global headers have been created for the company, this report-level header will override the global version. If no report-level header exists for a report, the global header is used.
Footer	Enter any text that you want to display in the report footer. If global footers have been created for the company, this report-level footer will override the global version. If no report-level footer exists for a report, the global footer is used.
Description	Enter text to describe the report. Text entered here appears in the report list and is searchable.
Publish Report externally to associated suppliers	Select **Yes** to publish a report to suppliers. After choosing **Yes**, options exist to publish the report to **All Suppliers** or **Selected Suppliers**. This option cannot be edited on the report execution page. To change the selection, you must edit the report definition. This option is not available unless it has been enabled in the buyer's company configuration and a base module that is visible to suppliers has been selected. **i Note** If a field is included on the report that is not available to suppliers, an error message displays to prevent publishing. The error lists fields that should be removed from the report before it can be published to suppliers.
Folder	Select a folder for the report. Folders are predefined by an administrator and are used to manage user visibility to reports based on user roles.
Owner	By default, the owner of the report is the current user. Select a different user from the list if you are creating the report on behalf of another user.

Field Name	Definition
Report Access	Select a default access type: • **Private**. Allows access only to the creator or owner users of the report, along with full administrators. • **Public but not Editable**. Enables other users to run the report and edit, but not overwrite the original report. They can copy the report to save it elsewhere if they have the proper permissions. Public but not Editable reports can be overwritten by administrators and the report creator and owner, if their user roles allow report **Manage** permissions. • **Public and Editable**. Enables other users to use and edit the report if they have the proper permissions. They can save any changes and overwrite the original report. • **Public Run Only**. This access can only be chosen by an SAP Fieldglass administrator. Public Run Only reports cannot be overwritten (even by administrators).
Maximum number of rows	The maximum number of rows that the report will retrieve when run. This value cannot be modified.
Data Source	Determines the database from which the report data is being pulled. • **Latest** displays only data that has not been moved to the archive database for the reporting tool. • **Archive** displays only data that has been moved to the archive database for the reporting tool.
Show Data For	Determines the subset of data that will display in a report when it is executed. The value selected here will be the default value shown on the report execution page. • **All** returns all system data that the user has permission to view. • **My Group** displays report data included in the user's My Own view plus data that the user has been given My Group access to. • **My Own** returns data that the user is associated with. • The **My Hierarchy** option displays if the user is in a role that has the **Hierarchy Visibility** flag enabled. When selected, the report includes data for the user and the user's subordinates. • The **Owner** option displays if the user is in a role that has the **Hierarchy Visibility** flag enabled. When selected, another drop-down displays with a list of the users that report to the logged in user. Choose a user to view report data for the specific user.
Run As User	If a user is selected here, it will allow the person executing the report to see the report data as if the person selected for **Run as User** had executed the report themselves. The ability to use this feature is based on a user's permissions. If the user running the report does not have permission to **View and Report on Sensitive Data**, he/she cannot see sensitive data if the user selected in the **Run As User** field has this permission enabled.
Font Name/Size	Sets font options.

Field Name	Definition
Page Orientation/Size	Sets page layout options.

2.5 Report Actions

Use the **Actions** menu from the report run time page to take action on the report.

For example, you can schedule the report, create a chart, or add the report to your SAP Fieldglass Home page. The options available in the **Actions** menu can vary based on the type of report or user permissions.

Choose this option...	To do this...
Create Chart	To create an interactive view of the report.
Create Pivot Table	To use the report's data in an Excel pivot table.
Set Up Home Page	To add the report to your SAP Fieldglass Home page.
Schedule Report	To automatically run the report based on a predefined schedule.
Copy Report	To create a new report based on the existing report's properties.
Remove Report	To delete the report.

2.5.1 Creating Pivot Tables

SAP Fieldglass allows you to design a pivot table view for summarized report data.

To create a pivot table, you must first select the parent report that contains the data you wish to view in a pivot table. Excel will open in the pivot table design view and allow you to select the fields you wish to summarize.

To create a pivot table:

1. On the Reports Details page, click **Actions** > **Create Pivot Table**.
2. Select options in the pivot table Designer:
    - Rows
    - Data Values
    - Columns
3. Select Pivot Table Options:
    - **Show Data Summation By**: Select **Column** to summarize data for each column or select **Row** to summarize data for each row. Only one option can be selected.
    - **Show Grand Totals For**: Select **Column** to show grand totals for each column and select **Row** to show grand totals for each row in the pivot table view. Both options can be selected.

4. Click **Continue**.
5. Complete the fields report setup and details fields, as you would normally for a report. For **Output Format**, **XLSX** and **XLS** are the available options for pivot tables.
6. When finished, click **Save**.

Related Information

Defining Report Details & Saving Reports [page 28]

2.5.2 Creating Charts

Creating charts allows users to quickly and easily define an interactive view of the current circumstances related to their report data.

Users with the user role permission **Reports: Manage** can create private reports and charts. Users must also have the **Reports: Publish** permission enabled in order to create public reports.

SAP Fieldglass has provided an easy-to-use method of creating useful charts for the information that is retrieved in reports. Like reports, charts can be displayed on users' home pages. Multiple charts with various layouts can be created for a report.

> **i** Note
>
> In addition to creating charts, users with appropriate user role permissions can also perform the following actions from the Chart Details page (similar to reports): **Edit**, **Remove**, **Copy**, and **Set Up Home Page**.

Creating a New Chart for a Report

To create a new chart, click **Actions** > **Create Chart** from the report Details page. Based on the fields included in the report, SAP Fieldglass may suggest charts for you. Either choose a suggested chart to begin with (you can edit it later), or click **Continue** without selecting a chart to create your own.

Complete the fields in the **Chart Type** section of the page.

Field	Description
Chart Type	Select a chart type. Available options include: **Bar**, **Column**, **Pie**, and **Line**.
Sub Chart Type	Select the sub chart type if necessary. This option is accessible if **Bar** or **Column** is selected for the **Chart Type**. Options include **Clustered** or **Stacked**.
3D Visual Effect	Select **Yes** to display the chart in 3D.

Field	Description
Legend Placement	If you wish to display a legend for the chart, select **Bottom** or **Right**. The default option is **None**.

> → Tip
>
> Predefined charts are available from the **All Reports** list and can be copied to create new charts. If the parent report does not have the desired field(s), then the parent report can be copied and edited before creating the new chart.

Choosing Design Options

In the **Designer** section of the Create Chart page, select the fields, functions, drill downs, display and group by options.

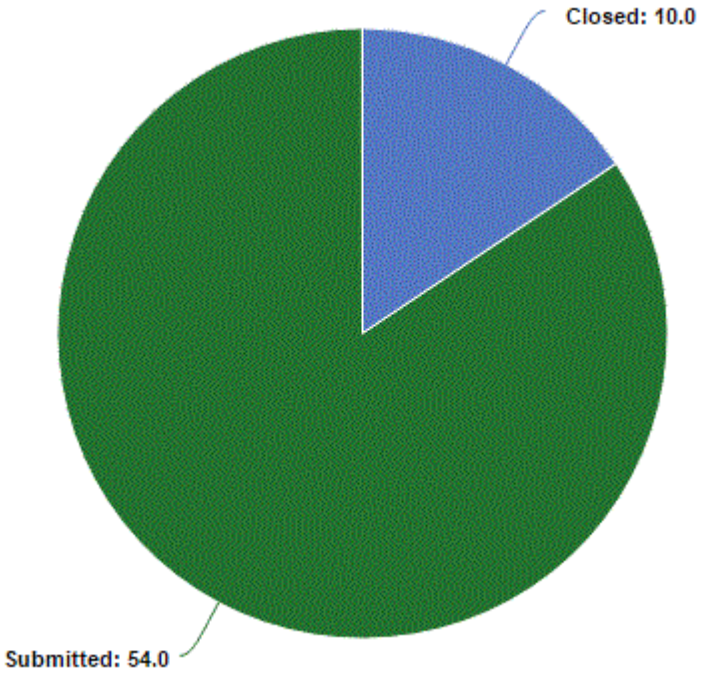
When finished, click **Continue** to set up the chart. Complete the information on the Setup page and click **Save**. After you click **Save**, a message will appear at the top of the page indicating that your chart was successfully saved. The chart will be available from the **My Reports** and **All Reports** pages.

Selecting Fields for Charts

To begin creating a new chart, users must select the data fields for the chart. Once fields are selected, users can apply summary functions, drill downs, group by options, and display options.

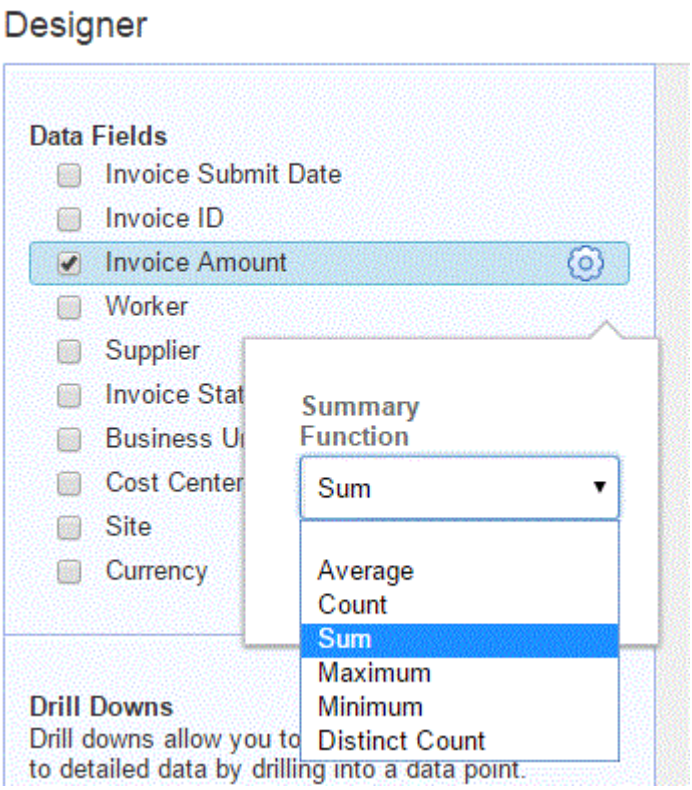
When creating charts, one data field and one label field must be selected. Fields available are based on the fields selected in the report. The data field selected is the portion of data that a user wants to view in the chart. The label field determines how that data will be divided in the chart. The data that displays is limited to any filters applied in the report.

When the data field and the label field are selected, the chart preview displays. As changes are made, the chart automatically updates.



Adding Summary Functions

Summary functions can be added to the selected **Data Field**. Click the gear icon next to the selected data field to add a summary function.



Select an option from the list and click **Close**. Options available are based on the type of data field selected.

Adding Drill Downs

Drill downs allow users to view the details of summarized information. Charts can include up to 4 drill downs. To add a drill down, click **+ Add Drill Down**. Select a field from the list. The drill down field allows users to click a segment of the chart and divide it into additional segments based on the field selected.

To remove a drill down from the chart, select **None** in the drop down list.

Applying Display and Group By Options

The **Display** option allows users to chart only the top matching values for the label field selected. For example, for a chart that shows job posting estimated spend by cost center, the creator could show the cost centers with the top ten highest estimated spend totals.

Display options are available for all chart types. Options include **Show All** and **Show Top**. If Show Top is selected, a value must be entered.

The **Group By** option allows users to create charts where the label field segments are broken out into groups. For example, users may want to create a chart that shows job posting estimated spend by business unit, and then break out each business unit by site.

Group by options are only available for bar and column charts. They cannot be used with pie or line charts. To add a group by option, select a field in the list.

Related Information

Reporting User Role Permissions [page 6]
Adding a Report to Your SAP Fieldglass Home Page [page 35]

2.5.3 Adding a Report to Your SAP Fieldglass Home Page

You can display a report on your Home page for quick visibility to system data.

> **i** Note
>
> Admins can also add reports to users' Home pages (individual users or all users in a user role).

To add a report your Home page:

1. Click your name in the upper right corner of the screen, then click **My Preferences** from the drop-down list.
2. Click **Edit** in the **Home and Detail Page** section.
3. Click the **Add Reports** link. The **Associate Reports/Charts to User** page displays.
4. Enter search criteria and click the **Filter** button to view reports that are available to add to your Home page.
5. Select the check boxes for the reports you wish to add to your Home page.
6. Click **Add**. The report selection(s) appear in the **Reports and Charts** section of the **My Preferences - Home and Detail Page**.

- The order the reports display in the **Reports and Charts** section reflects the order they will display on your Home page. Reorder reports in the list by clicking and dragging the move icon.
- To change the width of the report on your Home page (half page or full page), click the edit icon, then click **Half** or **Full**

7. Click **Update**.

→ Tip

You can also add a report or chart to your Home page by clicking  in the upper right corner then clicking the **+ Manage Reports/Charts** link while in Customization mode. Administrators can view which reports appear on a user's Home page by clicking a user's name in **Admin** > **User** then clicking **Reports and Charts**. Additionally, administrators can add and remove reports from this page.

Related Information

Adding Reports to Users' Home Pages [page 11]

2.5.4 Scheduling Reports

Reports that need to be run regularly or at a later time can be scheduled to run automatically.

Links to scheduled reports are displayed in the Report Outputs list, where the reports can be downloaded and saved when they have run.

To define schedule options, click **Actions** > **Schedule Report** from the report **Details** page. Complete the fields on the page (listed in the table below), then click **Save**.

Field Name	Definition
Turn on Schedule?	Click **Yes** to create a schedule for which the report will run automatically.
Schedule Name	Name the schedule. This name will display when viewing previously scheduled reports.
Frequency	Select how often the report should be run. Options include **Daily**, **Weekly**, **Bi-Weekly**, **Monthly**, **By Day**, **Quarterly**, and **Annually**. If the **By Day** option is selected, each day of the week displays. Select the check box(es) next to the day(s) on which you want to run the report. If the **Run Once** option is selected, the report will run once and then the schedule will be deactivated.

Field Name	Definition
Delivery Type	Choose whether the report should be emailed as a **URL**, **Attachment**, or sent via **SFTP**. Companies can send up to 25 scheduled attachment reports within a 24-hour period (standard or consolidated). Once the limit of 25 is reached, the 26th report is sent as URL and the email message notifies the user that the daily limit for attachment reports has been reached.
Encrypt Data/Public Key	These fields display if you chose **SFTP** or **Attachment** as the Delivery Type. To encrypt the resulting report, set this field to **Yes** and enter the encryption key in the **Public Key** field.
Email Addresses	Enter the email addresses for users who should receive a notification and a link/attachment when the report has run. Email addresses are optional. When no email addresses are entered, the report will still run and appear in the Report Outputs list view, but no email will be sent. If email addresses are entered, domains of these email addresses much match those set up in the **Email Domains** field in **Admin** > **Company Details**. Each email address, along with the report schedule creator, will receive a notification email if the latest scheduled report fails. For SFTP reports, the recipients in the email list will also receive a notification if the SFTP transport fails.
Start Date/Time	Enter a start date or select a date from the calendar. The start date indicates the date on which you want the schedule to begin. A future date can be selected to allow the schedule to begin later. Select the time at which the report should be run.
Filters	Choose the filtering options for the report.
Run As User	This field is required. Select a user to view the report data as if the person selected for Run as User had executed the report themselves. The ability to use this feature is based on a user's permissions.
Data Source	Determines the database from which the report data is being pulled. • **Latest** displays only data that has not been moved to the archive database for the reporting tool. • **Archive** displays only data that has been moved to the archive database for the reporting tool.
Show Data For	Determines the set of data that displays in the report. • **All** displays all report data that a user has access to, based on user permissions. • **My Group** displays report data included in the user's My Own view plus data that the user has been given My Group access to. • **My Own** displays report data where the user is linked to the data in some way, such as the creator, owner, supervisor, coordinator, or distributor. • The **My Hierarchy** option displays if the user is in a role that has the **Hierarchy Visibility** flag enabled. When selected, the report includes data for the user and the user's subordinates. • The **Owner** option displays if the user is in a role that has the **Hierarchy Visibility** flag enabled. When selected, another drop-down displays with a list of the users that report to the logged in user. Choose a user to view report data for the specific user.

Field Name	Definition
Output Format	Determine the file type of the report. Standard output options include: • **XLS**. Microsoft Excel spreadsheet. • **XLSX**. Microsoft Excel spreadsheet. • **CSV**. Comma separated values. • **CSV Data Only**. Report does not include header information, only the data. • **PDF**. Adobe Acrobat PDF format. When a report has been generated in the selected output, the file can be saved or opened.
Font Name/Size	Sets font options.
Page Orientation/Size	Sets page layout options.

Related Information

Automatic Schedule Deactivation [page 38]
Customizing Scheduled Report Email Messages [page 39]
Reporting User Permissions [page 8]

Automatic Schedule Deactivation

An SAP Fieldglass agent runs weekly and automatically deactivates report schedules for URL reports that have not been recently accessed.

The agent uses the criteria listed below to deactivate schedules. SAP Fieldglass sends a notification to the creator of each report schedule that the schedule has been deactivated.

Schedule Frequency	Schedules are deleted if reports have not been accessed in the past...
Daily	60 runs
By Day	30 runs
Weekly	10 runs
Bi-Weekly	8 runs
Monthly	6 runs
Quarterly	4 runs
Annually	2 runs

Customizing Scheduled Report Email Messages

Administrators can customize the text on email notification messages sent when a scheduled report is ready. These messages apply to the company level for all scheduled reports and can also be set at the parent company level.

To customize the email messages, use the following two options in **Admin** > **Messaging** for the **Reports** module:

- **Delivery Type – URL** allows the administrator to customize the email text for scheduled reports sent as URLs.
- **Delivery Type – Attachment** allows the administrator to customize the email text for scheduled reports sent as attachments.

The messages are enabled and include standard text by default. When a report is scheduled, the **Delivery Type** of the report (**URL** or **Attachment**) determines which message is sent.

To customize the email messages:

1. In Admin, choose **Messaging**.
2. Choose the **Reports** module to access the messaging options.
3. For **Delivery Type - URL** or **Delivery Type - Attachment**, or click the **Default** link to view the message Details page. (If the message has already been customized, this link is labeled **Customized**.)
4. On the Details page, click **Edit** to customize the email subject and/or body text.
5. Update the subject and body as needed. Type **#** to access a list of variables available for the report.
6. Click **Update**.

2.6 Creating an Excel Template for a Report

You can create a Microsoft Excel template for attachment to an SAP Fieldglass report.

A template is often used to include multiple worksheets with pivot tables, charts, formulas, or formatting in the report output.

Creating a Template

To build an Excel template for attaching to a report, first build an SAP Fieldglass report to your specifications. Then, run the report as an XLSX file and save it locally.

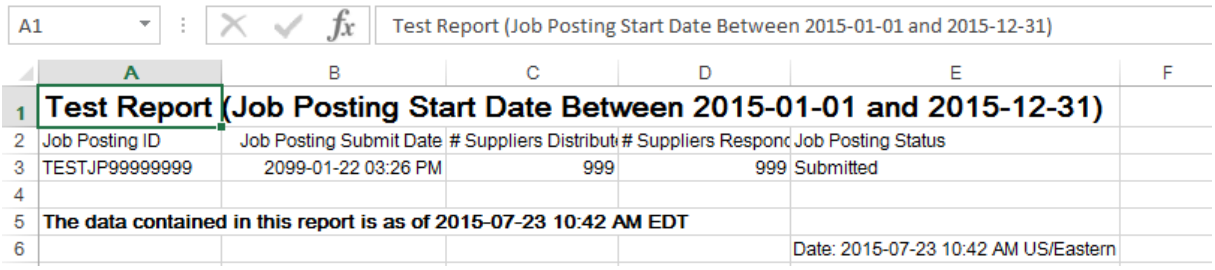
Format the 'report' Worksheet

The first worksheet in the spreadsheet is named **report**. This worksheet must be the first tab in the spreadsheet and the name must not be changed.

To format the report worksheet:

1. Delete all but one of the data rows.

2. Alter the data in the one remaining row so it is clear that the row is a placeholder row. If an error occurs, you want to be able to recognize that this row does not contain true data.
3. Do not change the column headers or report footers on this tab. When the report is run, the headers and footers are pulled from the report definition and any changes you have made on the template will revert to the original values.
4. When you are finished, the report worksheet should contain the following rows:
    - Row 1: Report title
    - Row 2: Column headers
    - Row 3: Data row
    - Row 4: Blank row
    - Row 5: Data “as of” date and time
    - Row 6: Report run date and time

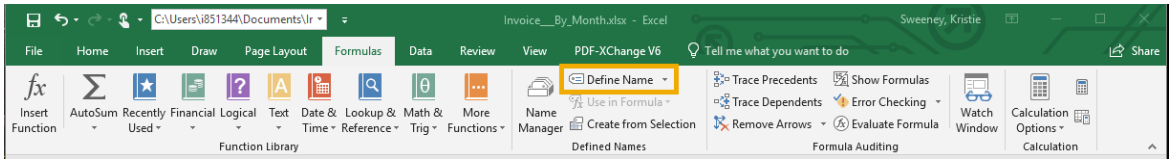


Creating a Dynamic Named Range

Depending on the information captured in your report, you may want to create a **Dynamic Named Range** that identifies all the rows of data in the report, regardless of how many rows are included when the report is run. A Dynamic Named Range is recommended if you want to add pivot tables or charts to the report.

To create a Dynamic Named Range, take the following steps:

1. With the template file open, choose the **Formulas** tab.
2. Choose **Define Name**.



3. In the **Name** field, enter a descriptive name (without spaces), such as ReportRange or MyData.
4. In the **Refers to** field, enter a formula that will always find the size of the report data, regardless of the whether the number of rows increases or decreases.
   The formula should look like this:
   =OFFSET(report!A2, 0,0,COUNTA(report!$A:$A)-2,COUNTA(report!$2:$2))

Formula Element	Description
`report!`	The worksheet name. This ensures the formula is always looking at the **report** sheet.
`$A$2`	Ignoring the report title, cell A2 should always be the top left cell of the data set (column headers are included in the data set).

Formula Element	Description
`0,0`	Tells the `OFFSET` function to move the top left cell of the range 0 rows down and 0 columns to the right.
`COUNTA(report!$A:$A)`	The **first** `COUNTA` formula returns a number that tells the `OFFSET` function how many rows down from A2 to include in the new range. (Count all rows in column A that aren't blank, then subtract 2 from that number. Why subtract 2? Subtract 1 for the report title in A1 and 1 for the report footer that is in column A at the end of the data set.)
`COUNTA(report!$2:$2)`	The **second** `COUNTA` formula returns a number that tells the `OFFSET` function how many columns to the right from A2 to include in the new range. (Count all columns in row 2 that aren't blank.)

Using the Dynamic Named Range in a Pivot Table

To use the Dynamic Named Range in a pivot table, take the following steps:

1. Start a new worksheet and create a pivot table that you want to include in the report.
2. Click anywhere in the pivot table to display the **PivotTable Tools** menu. Click **Change Data Source** in the ribbon.
3. Type the name of the Dynamic Named Range in the **Table/Range** field and click **OK**.
4. With any cell in the pivot table still selected, click **PivotTable** in the ribbon and select **Options**. Click the **Data** tab and ensure that:
   - **Refresh data when opening the file** is selected.
   - **Number of items to retain per field** is set to **None**.

   These settings will ensure that the pivot table fully refreshes to the new data set each time the report is run.

Attaching the Template to a Report

Before you save the file and attach it to a report, be sure that the following requirements have been met:

- The template must be smaller than 5 MB.
- The template must have an XLSX extension. Templates with an XLS or XLSM extension are not supported.
- The template must not contain coding (also known as macros).
- The first worksheet in the template must be named **report**. For optimal performance, this worksheet should only contain the rows described in the procedure to create the template.
- There is no limit to the number of additional worksheets that you can add to the template or the content that you add to these sheets. The remaining worksheets in the template could contain:
  - Pivot tables and other information derived from the data on the **report** tab.
  - Data that doesn't reference or act upon the report data. For example, a worksheet might be formatted as a signature page.

Attach the Template to an SAP Fieldglass Report

1. Using the **Analytics** menu, create or edit the report to which you want to add the template.
2. Scroll to the bottom of the page and click **Show More Configuration**.
3. Click **Attach** under **Excel Template**.

4. Locate the template you want to attach to the report and click **Attach**.
5. Continue creating/editing and save the report.

2.7 Advisor Reports

Advisor reports are displayed while viewing and approving items and provide key information to guide a user to make good decisions or take action.

For example, when approving a time sheet, if a manager notices that the worker is getting close to exceeding their budget, the manager might request the worker scale back the hours being worked for the duration of the assignment or quickly initiate a request for a budgetary increase before spend is depleted.

Advisor messages can be set up to display within document view pages. They can also be displayed within specific sections of the following forms: job posting, SOW, SOW revision, work order, and work order revision.

Related Information

Advisor Permissions and Visibility [page 42]
Enabling or Disabling Advisors [page 43]
Creating an Advisor Report [page 43]
Viewing Reports in Advisor [page 44]

2.7.1 Advisor Permissions and Visibility

The **Advisor** user role permission determines which roles can access advisor administration functionality in SAP Fieldglass.

The **View** permission allows users to view the Advisor Admin object and the list of predefined advisors. The **Manage** permission allows users to enable or disable predefined advisors through the Advisor Admin object. Enabling the **Manage** permission automatically enables the **View** permission.

Visibility to advisor reports is determined by the folder of the advisor report. If a user's role is associated to the report folder, the advisor report is visible to the user on the related views and forms.

Related Information

Running Reports from the All Reports List [page 16]
Advisor Reports [page 42]

2.7.2 Enabling or Disabling Advisors

Advisors can be enabled or disabled in the Advisor Admin object by selecting or clearing the **Enable?** check box for any advisor. Buyer defined and predefined advisors can be enabled or disabled on this page.

Up to 10 advisors can be enabled for each document or form section (listed in the **Advisor Displays On** field). The advisor limit includes both types of advisors - predefined and buyer defined. There is no limit to the number of advisors a company can create (only a limit to the number enabled).

> **i** Note
>
> SAP Fieldglass does not allow a user to create an 11th advisor if 10 advisors are already enabled for that document or form section.

2.7.3 Creating an Advisor Report

Use the **Advisor** Admin object to create advisor reports. Advisor reports can be made visible on document view pages and form sections. Only users with **Advisor: Manage** user role permissions can create advisor reports.

To create a text-based advisor, contact SAP Fieldglass. Text-based advisors are predefined and can be enabled or disabled by buyer users using the **Advisor** Admin object.

To create a new advisor report, click **New** in the **Advisor** Admin object. Use the field descriptions below to help create a new advisor report. When you are finished, click **Update**.

When you have completed the advisor report setup, the advisor is enabled and appears in the list of advisors in Admin.

Field Name	Definition
Advisor Name	Enter a name for the advisor. The name is displayed in the advisor pop up above the advisor content.
Description	Enter an optional advisor description.
Report	Click **Select Report** to choose the report to use as advisor from the All Reports list.
Filters	The available filters display when a report has been selected. Update filters if necessary.
Select the document on which the advisor should be based	This field filters the report or chart based on the document selected so only the information related to the document displays. For example, an advisor report with this field set to **Job Posting** will only display the job posting information related to the document. The **Job Posting Template** and **SOW Template** options filter advisor report data based on the title of the Job Posting Template or SOW Template. For example, a user can create a cost allocation report by cost center. When using the **Job Posting Template** option to filter the report, the advisor report will show data from all cost centers used from the template.

Field Name	Definition
Restrict Data Further By	When a report is selected and **Job Posting Template**, **SOW Template**, or **Job Code** is selected in the **Select the document on which the advisor should be based** field, this field displays. This field can be used to further filter the advisor data. For example, if the data is based upon **Job Posting Template**, the data could be restricted by cost center.
Advisor Displays On	Choose where the advisor should appear. For example, choosing **View Job Posting** displays an advisor icon and link to the report on the view job posting page. If you chose the **Job Posting Template** or **SOW Template** option in the **Select the document on which the advisor should be based** field, you can also choose the specific form section(s) where to display the report.

Related Information

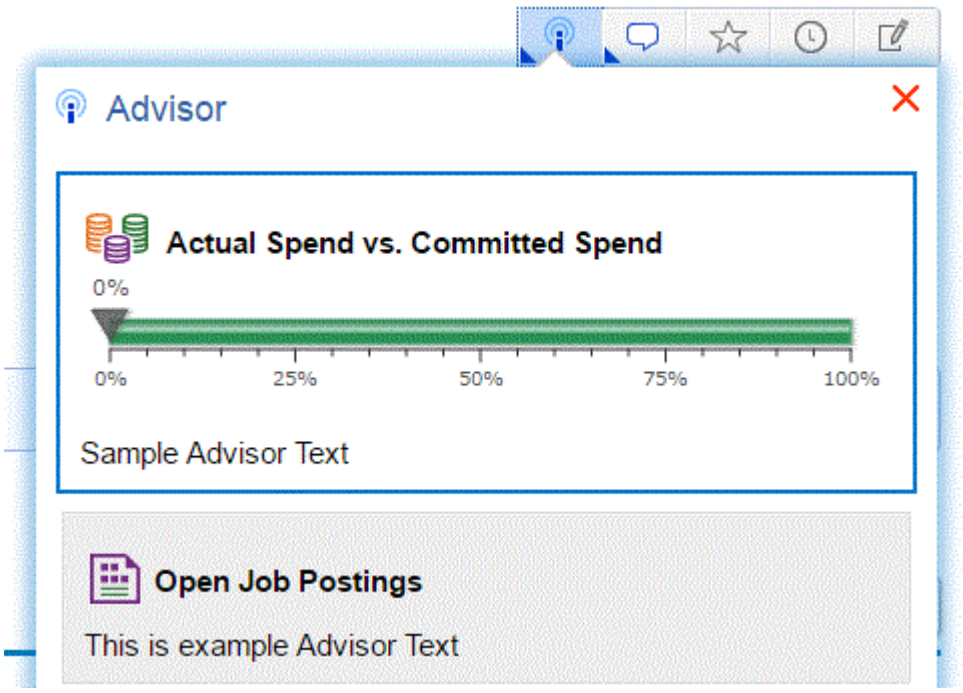
Advisor Permissions and Visibility [page 42]
Enabling or Disabling Advisors [page 43]
Viewing Reports in Advisor [page 44]

2.7.4 Viewing Reports in Advisor

Visibility to an advisor report is determined by the report folder.

If a user's role is associated to the report folder, the advisor report will be visible to the user on the related views and forms. In addition, users must have the report **Manage** user role permission enabled to view advisor reports.

To view advisor reports, click the  icon in the upper right corner of the page or form section. The report appears as a link. Click the link to view the report.



Only the information related to the document appears. For example, if the document type selected for the advisor report is **Job Posting**, when viewing the report on a work order, only the job posting information related to the work order appears.

Related Information

Reporting User Role Permissions [page 6]
Advisor Permissions and Visibility [page 42]

3 PMO Dashboard

The PMO Dashboard allows authorized users to manage day-to-day tactical items within SAP Fieldglass that may require action. Follow up and completion of these work items ensures that the workflow continues with minimal interruptions. Use of this tool can immediately improve the efficiency of the program.

The data displayed when a user accesses the PMO Dashboard is based on the business unit, site, and cost center associations of the user. The dashboard includes two groups: Critical and Warning, and the items that appear in each are based on the PMO Dashboard Threshold settings. Thresholds are set to determine the amount of time that should pass before an item that requires action triggers a warning and then becomes critical if no action is taken.

Related Information

PMO Dashboard Setup [page 46]
PMO Dashboard Thresholds [page 47]
Using the PMO Dashboard [page 48]

3.1 PMO Dashboard Setup

A few steps are required to implement the PMO Dashboard. Additional setup options are also available to ensure the desired use of this feature.

Required Setup

Required Setup	Description
Enable the PMO Dashboard company configuration option.	The **PMO Dashboard** company configuration option must be enabled before users can be given access to the dashboard. When enabled, **Thresholds - PMO Dashboard** is an option in the **Workflow** section of the Admin menu.
Enable the PMO Dashboard user profile feature option.	When the **PMO Dashboard** company configuration option is enabled, **PMO Dashboard** displays as an option in the **Feature Access** section on a user's profile. Enable this option to allow the user access to the PMO Dashboard.
Establish PMO Dashboard Thresholds.	PMO Dashboard Thresholds are used to determine the items that will display on the PMO Dashboard and to establish warning and critical levels for those items. Threshold settings are not enabled by default.

Optional Setup

Optional Setup	Description
Enable the PMO Dashboard user role permissions.	Enable the **PMO Dashboard** user role permissions for users who will need to establish PMO Dashboard thresholds. In order to establish the necessary thresholds that populate the PMO Dashboard with information, users must be an Administrator or in a user role with the Administrative Permissions **Thresholds- PMO Dashboard**: **View** and **Manage** enabled.
Enable PMO Dashboard messages.	Default PMO Dashboard messages are available and can be enabled or customized in the **Thresholds - PMO Dashboard** module in **Admin** > **Messaging.**

Related Information

PMO Dashboard Thresholds [page 47]

3.2 PMO Dashboard Thresholds

In order for items to appear in the PMO Dashboard, thresholds must be enabled and values must be entered.

PMO Dashboard Thresholds are used to determine the items that will display on the PMO Dashboard and to establish warning and critical levels for those items. PMO Dashboard Thresholds also determine when critical and warning icons display for items in SAP Fieldglass, such as activity items and offboarding activity items and worker items in the My Workers Dashboard.

Administrators and users with appropriate administrative permissions can establish PMO Dashboard Thresholds in the **Workflow** section of the **Admin** menu. Click **Edit** to enter new thresholds or update existing settings.

For the thresholds you wish to capture on the PMO Dashboard, enter numeric values for the **Critical** and **Warning** columns. Depending on the module, thresholds are set based on number of days or a percentage. For example, a threshold may be set to include workers nearing their end date on the PMO Dashboard. The Warning threshold may be set at 14 days and the Critical threshold may be set at 7 days. Workers with an end date between 14 and 8 days away from the current date will be listed in the warning list, and workers whose end date is within 7 days of the current date will be in the critical list.

Select the check box next to any threshold you wish to have displayed on the PMO Dashboard. If the check box is not selected for a threshold, items meeting the threshold will not be displayed on the dashboard even if values have been set in the **Critical** and **Warning** columns.

> **i** Note
>
> If enabled, some thresholds display in the PMO Dashboard immediately as critical items, such as time sheets in Approval Paused status. The **Critical** threshold value for these items is set to **Instantly** and cannot be changed. Warning threshold settings do not apply.

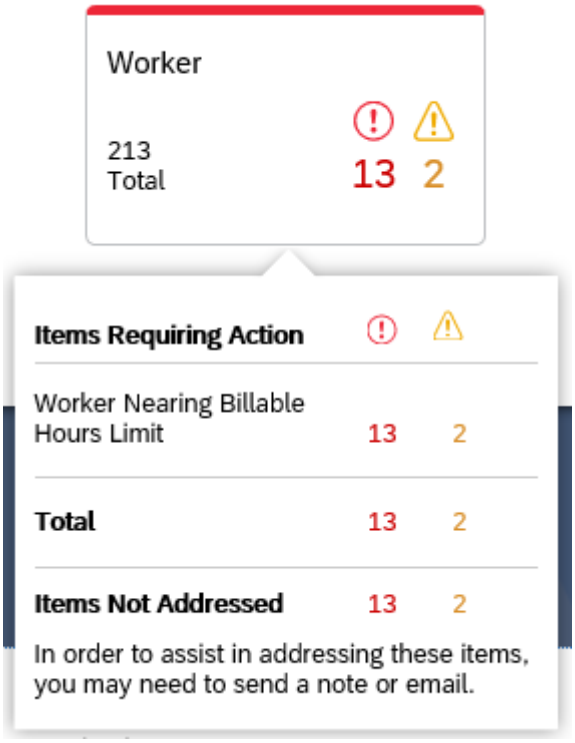
3.3 Using the PMO Dashboard

To use the PMO Dashboard, choose **PMO Dashboard** from the **Analytics** menu.

The PMO Dashboard includes two tabs: **PMO Dashboard** and **Your Work Items**. If you have user role permissions to reassign work items, you will also see a **Reassign Work Items** tab.

Items are grouped by module (for example, Worker) in a tile format. Each tile displays the count of items that meet the defined threshold values that have not been acted upon in Warning (yellow) and Critical (red) status. The **Total** on each tile represents the sum of all items that are in statuses for which a PMO Dashboard threshold can be configured. (It does not reflect the number of items for that module that actually meet the thresholds.)

Click a tile to open a summary of items requiring action (number of items per threshold). Click an individual threshold to open a list view of items requiring action.



Using Filters

You can filter the PMO Dashboard results by using the filters at the top of the page. Use the **Show More Filters** link at the top of the page to reveal the full list of filters. Clicking **Show Less Filters** hides filters to free up space on the page.

When you are finished making filter selections, click **Search** to display the search results.

Filter	Description
All, My Group, My Own	These filters display for all users, but only display results you are permitted to see. For example, clicking **All** only displays your items if you are restricted to visibility to your items only.
Labor Type	Use to limit results to items that are associated to particular labor type(s).
Cost Center, Site, Business Unit, Supplier	By default, all items are shown. Click **Select** to limit results to items that are related to particular cost centers, sites, business units, and/or suppliers.
Document Type	Choose to display items for **Contingent**, **Services**, or **All** document types. For example, choosing **Services** hides thresholds for job postings.
Only show items requiring action	Setting this filter to **Yes** hides tiles that have no thresholds for both critical and warning. All tiles display if this filter is set to **No**. Tiles with no thresholds display zero counts.

Document Type filters are **Contingent** and **Services**. When both are selected all sections are shown on the PMO Dashboard. When filtering on **Contingent** only, the Statement of Work (Including Revisions) and SOW Line Item sections are not included. When filtering on Services only, the Job Posting and Job Seeker sections are not included.

The table below describes the documents that are included when the **Document Type** filter is set either to **Contingent** or **Services**, but not both.

Turning Tiles On and Off

You can customize which tiles display when you view the PMO Dashboard. As members of the Program Office may have different responsibilities, everyone may not need to see all available modules. This feature lets you suppress any modules that you do not want displayed on the dashboard.

To turn tiles on and off, click the wrench icon at the top of the PMO Dashboard. Set tiles to **On** or **Off**, then click **Done** to return to the PMO Dashboard view.

4 Visualizer

SAP Fieldglass Visualizer is a collection of dashboards and graphs that can be used as business reporting tools to assist in corporate decision-making. Access the functionality from the main menu by selecting **Analytics** > **Visualizer**.

This Visualizer module provides a unique graphical and interactive analysis of the human capital data. A series of visuals display the analysis extracted from the underlying data sets so you can proactively detect emerging trends. Visualizer includes drill-down capabilities to view the data elements used to support each trend and dive right into the appropriate location within the SAP Fieldglass application where immediate action can be taken, if necessary.

By leveraging the analytics produced by the SAP Fieldglass application, Visualizer offers an aggregated workforce view that allows you to balance resource availability against required skills, open requisitions, and current projects. It visually represents advanced supplier benchmarks including the KPIs (Key Performance Indicators) of a supplier against the average or target KPIs.

Visualizer offers a series of interactive charts and dashboards that helps identify trends, patterns, and anomalies in the workforce that may require action or follow up, such as tenure violations and overtime excesses. Using warning and critical level thresholds, you can be visually alerted when performance measurements are not meeting expected success rates.

> **i** Note
>
> The Visualizer is updated weekly. Changes made to thresholds do not have an immediate impact in the Visualizer charts and dashboards. Updated alerts will be captured when the next Visualizer update is completed.

4.1 Visualizer Setup

The Visualizer requires configuration before it can be utilized.

The following actions are required to set up and use the Visualizer feature in the Analytics menu:

- In the Company Configuration, enable the **Visualizer** option.
- In the User Account Setup, enable the **Use Visualizer** option.

Set the desired Visualizer thresholds in the Admin Configuration menu, Workflow section, by selecting **Thresholds - Visualizer**.

Related Information

Visualizer Thresholds [page 51]

4.2 Visualizer Thresholds

To configure the Visualizer thresholds, enable the desired metrics and enter the desired threshold values by accessing them at **Admin Menu** > **Thresholds - Visualizer**.

When the **Visualizer** company configuration is enabled, threshold settings are available to be updated from the **Thresholds - Visualizer** option in the Admin Configuration menu Workflow section.

Visualizer thresholds are used to alert buyers when specific measurements are not meeting expected levels of success. The metrics included in the Thresholds table are used in the Visualizer tool to present the state of their key performance indicators (KPI) using charts and dashboards. Each metric can be enabled and thresholds can be entered to alert buyers when the behavior of each is at a warning level and a critical level of performance.

Setup

To set up the Visualizer thresholds, click **Edit**.

- Enable key performance indicators by selecting the checkboxes.
- Enter the Critical and Warning threshold values. In the Visualizer tool, Warning levels for metrics appear yellow and Critical levels appear red.
- Set the time periods, as needed.

> **i** Note
>
> Threshold settings can be enabled and updated at any time. However, the data displayed in Visualizer does not reflect the new thresholds until the weekly Visualizer updates.

4.3 Using the Visualizer Home Page

The Visualizer home page provides access to a set of dashboards and charts. It contains links to available dashboards and a collection of charts that are divided into various categories. To access the Visualizer home page, select **Analytics** > **Visualizer**.

Dashboards

Dashboards are available as links in the Dashboards section of the home page. Dashboards provide summaries and graphical views of important data sets for a specified date range. The Overview dashboard provides a high-level analysis of the top indicators of performance for buyers, such as total number of workers, committed

spend, and remaining spend. The remaining dashboards provide specific information related to a set of selected values. From the Visualizer home page, the following dashboards are available:

- Overview
- Business Unit
- Supplier
- Cost Center
- Site
- Job Posting Template
- SOW Template

Charts

Charts provide a visual summary of performance measures for a specified date range. The set of interactive charts displays the details of specific data points in the charts. From the Visualizer home page, the following charts are available:

- Spend
- Rates
- Workers
- Job Posting
- Services
- Cycle

Related Information

Viewing Dashboards [page 52]
Viewing Charts [page 58]

4.4 Viewing Dashboards

In the Dashboards section of the home page are links that provide summaries and graphical views of important data sets for a specified date range.

The Overview dashboard provides a high-level analysis of the top indicators of performance for buyers (such as total number of workers, committed spend, and remaining spend) and the other dashboards provide specific information related to a set of selected values. To view a dashboard, click the desired link in the Dashboards section of the Visualizer home page. For all dashboards, except the Overview dashboard, you are prompted to select a specific set of criteria to filter the data that appears in the dashboard.

1. To view the Business Unit dashboard, select a Period, a Business Unit, and a Data Source.

The Supplier, Job Posting Template, and SOW Template dashboards have additional criteria that allow viewing of data for all business units, cost centers, and sites or to filter the data by selecting a specific set for each.

2. Select the desired filters and click **Run** to display the dashboard. The dashboard displays a set of relevant data views and charts. Data displayed in dashboards is based on one or more Data Source options selected. When both are selected, data views and charts for Job Posting and Statement of Work appear in the dashboards.
3. To view a different data set, change the filters and click **Run** again.

Dashboard Data Views

The dashboard views include the following:

- Metrics: Includes Job Posting total spend and number (#) of job seekers, Statements of Work budget and number (#) of SOWs, and similar details.

  To view a related chart, click the chart icon (). The selected chart page displays.
- Top Items by: This list includes the top corresponding suppliers, business units, sites, cost centers, and job posting templates, and/or SOW templates. The Top Items by lists vary based on the dashboard displayed. To change the data displayed in the section, select a different value in the dropdown.
  To view a specific dashboard, click a link in the Top Items list.
- Dashboard charts are interactive and you can click chart elements for additional information, including:
  - To view additional information, hover over data elements.
  - To add or remove the data element in the chart, click an element in the legend.

4.4.1 Visualizer Dashboards

Dashboards provide summaries and graphical views of important data sets for a specified date range.

Overview Dashboard

The Visualizer Overview dashboard displays overview data related to supplier performance, job postings, services, users, and workers. This summary box across the top of the dashboard includes summary information based on open workers and SAP Fieldglass users. The following information is included:

Field	Description
Job Postings	Number of job postings that are associated to the total number of open contingent workers.
Headcount	Number of open contingent workers (based on data in the reporting database).
Remaining Spend	Total remaining spend for all open contingent workers.
SOWs	Active SOWs that are associated to the total number of open team members.
SOW Headcount	Number of open team members.
Remaining SOW Budget	Amount of funds remaining and available for the SOW.

Field	Description
Profile Worker Headcount	Total number of profile workers.
User Headcount	Total number of SAP Fieldglass users.

This dashboard also includes the following sections:

Field	Description
Total Workforce chart	For buyers, displays their workforce population percentage within each section including: Users (active SAP Fieldglass users), Temp (contingent), SOW, and Profile Workers. Clicking a chart section opens the headcount modal, which displays the worker or user list for that workforce type.
Contingent Worker by Headcount and Spend chart	Hover over the chart elements to view the totals for each month. To remove and add an element to the chart, click the legend elements at the bottom.
Forecast Data	Click the **More** link to access an in-depth chart view of the Contingent Worker by Headcount and Spend chart.
Biggest Spenders & Gainers	Click the links to access more dashboards with specific data for each supplier, site, and job posting template, or click the **More** link to view the Top 5 Spend charts.
Cycle Times	Click the **More** link to access the Cycle Times chart for a view of all cycle times for a period.
Threshold Alert	Alerts that display in the Threshold Alerts section display as yellow for warning level and red for critical level.

Master Data and Supplier Dashboards

Business Unit Dashboard

For a company, the Business Unit dashboard provides a view of multiple components related to the business units. This dashboard can be used to review specific data aligned with individual business units and provides the following views:

- Recap period data for categories Committed Spend, Actual Spend, number of Job Postings, and number of workers. This recap data also includes rankings against other business units in these categories.
- Data slices of top suppliers using this business unit, most used job posting templates, top associated sites, and cost centers.
- Basic information related to job activities, top performers in different areas, and charts related to worker counts, tenure, and spend amounts are also included.

Supplier Dashboard

The Supplier dashboard provides a view of related supplier activities and performance. Information about both Job Postings and Statements of Work can be viewed. This dashboard can be used to review specific data for selected suppliers and provides the following views:

- Recap period data for the categories of Total Spend, Overtime Spend, Job Seekers Submitted, Work Order Accepted, and # of Active Workers.

- Average Performance recap data for Job Seeker per Job Posting, Average Engagement Length (Days), Average Bill Rate, and Rating (1 – 100). This recap data also includes rankings against other suppliers in these categories and a comparison to all suppliers.
- Snapshot of worker quality as defined by the worker close reason categorization (Positive, Neutral, Negative, Negative Do Not Rehire).
- Data slices of the top job posting templates as well as top associated sites, cost centers, and business units for this supplier.

The Supplier dashboard also provides a view of multiple components corresponding to supplier companies including basic information related to job activities, supplier performance, Key Performance Indicators (KPI), and cycle times.

Contingent and Statement of Work KPI charts are included on the Supplier dashboard.

Contingent KPIs (on the Supplier dashboard)

The following table describes the categories in which the Contingent KPI chart is divided. The KPI chart shows data on both the selected supplier and the average for all the suppliers supporting the buyer.

Category	Description
Response Rate	The percentage of job postings sent to the supplier that result in a minimum of one job seeker submitted.
Hire Rate	The percentage of job postings that result with at least one work order being submitted.
Rate Compliance	The percentage of job seekers who are submitted at or below the maximum rate amount for the corresponding positions on rate grids.
Acceptance Rate	The percentage of work orders created for the supplier that result in Confirmed and Activated work orders.
Candidate Quality	The percentage of job seekers submitted by the supplier that result in a work order being created.
Departure Rate	The percentage of work orders that are closed before the first work order original end date.
Worker Extend	The percentage of workers whose assignments result in extending the original work order end date.
Worker Replace	The percentage of work orders that result in a Worker Replace function.

Statement of Work KPIs (on the Supplier dashboard)

The following table describes the categories in which the Statement of Work KPI chart is divided.

Category	Description
On-Time completion of SOW	Percentage of closed SOWs with the SOW Completed date equal to or less than the End Date of the original SOW.
RFX fulfillment Ratio	Percentage of RFXs turned into SOWs.
RFX Intent to Respond Ratio	Percentage of RFXs accepted vs. declined.
Schedules/Events Complete at Requested Amount	Percentage of schedules and events marked complete at the requested amount.
On-Time Delivery of Line Items	Percentage of Management Events (Supplier Actor), Events, or Schedules marked Complete by their due dates.
Rate Compliance	Percentage of SOW Workers with ST Rate at or below the Requested Amount.
Candidate Quality	Percentage of workers closed with a positive reason code.
SOW Closed Reason Positive/Neutral	Percentage of SOWs closed with a positive vs. a neutral reason.
On-Budget Delivery of SOW	Percentage of SOW where the final Max Budget is less than the Max Budget on the original version of the SOW.

From this chart, users can perform the following actions:

- To view the KPI score for the supplier, hover over a point in the chart.
- Click the supplier name at the top of the chart to jump to the Supplier dashboard.

Cost Center Dashboard

The Cost Center dashboard provides a view of multiple components related to the cost centers of a company. This dashboard can be used to review specific data aligned with specific cost centers and provides the following views:

- Recap period data for categories Committed Spend, Actual Spend, # of Job Postings, # of Active Workers. This recap data also includes rankings against other cost centers in these categories and a comparison to all cost centers.
- Data slices of top suppliers using this cost center, most used job posting templates, top associated sites, and business units.
- Basic information related to job activities, top performers in different areas, and charts related to worker counts, tenure and spend are also included.

Site Dashboard

The Site dashboard provides a view of multiple components related to the sites of a company. This dashboard can be used to review specific data aligned with specific sites and provides the following views:

- Recap period data for categories Committed Spend, Actual Spend, # of Job Postings, # of Workers. This recap data also includes rankings against other sites in these categories and a comparison to all sites.
- Data slices of top suppliers using this work site, most utilized Job Posting Templates, top associated Business Units, and Cost Centers.

- Basic information related to job activities, top performers in different areas and charts related to worker counts, tenure, and spend amounts are also included.

Job Posting and SOW Template Dashboards

Job Posting Template Dashboard

The Job Posting Template dashboard provides a view of multiple components related to the job posting templates of a company. This dashboard can be used to review specific data aligned with individual cost centers and provides the following views:

- Recap period data for categories Committed Spend, Actual Spend, # of Job Postings, # of Active Workers as well as Average Performance recap data for Job Seeker Response Rate and Work Order Mean Rate. This recap data also includes rankings against other job posting templates in these categories and a comparison to all job posting templates.
- Data slices of top suppliers using this job posting template as well as top associated sites, cost centers, and business units.
- The Active Workers by Tenure and Spend chart and the Work Rate Analysis chart also appear on this dashboard.

The Job Posting Template dashboard provides a view of multiple components related to the job posting templates of a company. Basic information related to job activities, top performers in different areas, and charts related to worker counts, tenure, spend, and rate analysis are also included.

Cost Center Dashboard

The Cost Center dashboard provides a view of multiple components related to the cost centers of a company. This dashboard can be used to review specific data aligned with individual cost centers. This dashboard provides the following views:

- Recap period data for categories Committed Spend, Actual Spend, # of Job Postings, # of Workers. This recap data also includes rankings against other cost centers in these categories and a comparison to all cost centers.
- Data slices of top suppliers using this cost center, most used job posting templates, top associated sites, and business units.
- Basic information related to job activities, top performers in different areas, and charts related to worker counts, tenure and spend are also included.

SOW Template Dashboard

For a company, the SOW Template dashboard provides a view of multiple components related to the Statement of Work (SOW) templates. This dashboard can be used to review date aligned with those specific SOW templates. This dashboard provides the following views:

- Recap period data for categories Budget, Actual Spent, # of Statements of Work, and Workers. This recap data also includes rankings against other SOW templates in these categories and a comparison to all templates.
- Data slices of top suppliers using this template as well as top associated sites, cost centers, and business units.

4.5 Viewing Charts

SAP Fieldglass provides interactive charts with elements that show additional information, drill down functionality to source data, and a dashboard view.

On the Visualizer main page, the name, brief description, and symbolic icon are provided for each chart.

1. Open the desired chart by clicking on the name.
   Prompts to select a specific set of criteria that filters the set of data that appears in the chart.
   - **Data Source** options are Job Posting and Statement of Work. When Data Source is an option, one or both can be selected. If only Job Posting is selected, the data displayed in the charts only includes contingent spend. If only Statement of Work is selected, the data displayed in the charts only includes services spend.
   - Charts may have more criteria that allow viewing of data for all business units, cost centers, and sites or to filter the data by selecting a specific set for each.

   EXAMPLE: To view the Top 5 Spend chart, select a Period, a Spend Type, and a Data Source.
2. To execute the chart, click **Run**.
   The chart displays.

The following actions can be performed from a chart:

- To view a different data set, change the filters and click **Run**.
- To return to the Visualizer home page, click the **Go to Visualizer Charts** link at the top left corner.

Charts are interactive and you can click various chart elements to access different charts and dashboards, including:

- Hovering over a chart element to view additional information.
- Clicking a chart element to access the corresponding dashboard.

4.5.1 Visualizer Charts

Charts provide a visual summary of performance measures for a specified date range. The set of interactive charts allows you to view the details of specific data points displayed in the charts.

Spend Charts

The available spend charts allow you to view a breakdown of the top spenders for a company.

Top 5 Spend

The Top 5 Spend chart displays spend data sliced by the top five Suppliers, Business Units, Cost Centers, Work Sites, Job Posting Templates, and SOW Templates. For comparison, the remaining information is grouped together in a data point labeled Others. This view provides the information for quickly validating the spend allocation across the selected data point and delivers a click through from the selected chart to the related comprehensive dashboards.

> **Note**
>
> Supplier data is not included in Estimated Spend.

If only the Job Posting Data Source is selected, the SOW Template chart does not appear in the group. If only the Statement of Work Data Source is selected, the Job Posting Template chart does not appear in the group.

From each chart, click a chart element to access the corresponding dashboard. For example, click a business unit in the Top Business Units chart to access the Business Unit dashboard.

Hierarchical Spend by Business Unit

The Hierarchical Spend by Business Unit chart displays spend data summarized by business unit spend. It can be used to identify and drill into key business unit spend. This chart shows the spend amount in a multilevel pie chart where each pie segment in the first ring represents a top-level business unit. It should be viewed like a cone, where the middle circle is the point of the cone.

There may be more rings depending on the business unit structure of your company within SAP Fieldglass. Using this chart, easily identify the business units that are the primary spenders.

Click a business unit in the chart to display three more charts showing top worker, supplier, and job posting template spend for that business unit. These charts provide a view of aggregate spend across the different levels of the company.

Clicking an element in the chart provides access to the corresponding dashboard. For example, click a supplier in the Top Suppliers chart to access the Supplier dashboard.

Supplier by Rating and Spend

The Supplier by Rating and Spend chart displays supplier performance and spend data. For a supplier, use this chart to quickly compare a rating to their aggregate spend allowing you to quickly identify anomalies (high spend – low rating), validate favorable performance (high spend – high rating), and opportunities to leverage high performing suppliers (high rating – low spend).

> **Note**
>
> The Supplier by Rating and Spend chart only requires a Period filter.

From this chart, you can perform the following actions:

- Hover over a point in the chart to view the KPI score for the supplier.
- Click the supplier name at the top of the chart to jump to the Supplier dashboard.

Rates Charts

The available rates charts show the rates analysis by job posting template. Enter a Period for which to display the data, and if needed, select a job posting template.

Worker Rate Analysis by Location

The Worker Rate Analysis by Location chart displays worker rates for the selected job code and geographical location. This chart displays and compares worker rates based on region of the respective workers.

The world/country map is a heat chart by headcount. Blue is cool representing a low worker rate in the region while yellow, orange, and red are varying degrees of heat representing an increasing worker rate.

Click a state to display a list of workers for a location.

Work Order Rate Analysis by Job Code

The Work Order Rate Analysis by Job Code chart compares the final rates against the requested rates for a selected job code. Use this chart to determine trends in rates on work orders. You can compare the average rate by month to the number of staffed positions for that month, as well as month-over-month trends of acquisition and final bill rates.

This chart also allows determination of rate card compliance and overall competitiveness of submitted candidates. It is a traditional candle stick chart combined with a column chart that shows rate compliance over time and against volume (data on this chart shows rate data across all sites). The box shapes within this chart represent the minimum and maximum rates per the rate card, and the lines extending from those boxes show the actual minimum and maximum rates by worker. If there are no lines visible, that means all rates were within the rate cards.

Hover over each box to view the following information:

- Maximum Template Rate
- Maximum Work Order Rate
- Minimum Work Order Rate
- Minimum Template Rate

Work Order Rate Analysis by Title and Site

The Work Order Rate Analysis by Title and Site chart compares the final versus requested rates within the top ten job posting templates by site. This chart adds another dimension to the Work Order Rate Analysis by Title chart providing a representation of the number of job postings per site, along with an additional breakdown of work order rates. Use this chart to review the actual versus requested rates by top sites.

From this chart, you can perform the following actions:

- Hover over a chart element to view additional information.
- Click an element in the legend to remove and add elements to the chart.
- Click a chart element to display a chart that compares the average rate by month to the number of staffed positions during that month for the selected site.

Job Seeker Rate Analysis by Title and Site

The Job Seeker Rate Analysis by Title and Site chart compares the presented rates against the requested rates within the top five job posting templates by site. By comparing the job posting maximum and minimum requested rates to the maximum and minimum rates presented, you can easily determine if candidates are being submitted above, at or below the requested rates.

From this chart, you can perform the following actions:

- Hover over a chart element to view additional information.
- Click an element in the legend to remove and add elements to the chart.
- Click a chart element to display a chart that compares the average rate by month to the number of staffed positions during that month for the selected site.

Job Seeker Rate Outlier

The Job Seeker Rate Outlier chart displays the presented rates falling outside plus or minus (+/-) 5% of requested minimum and maximum rates. This data shows if suppliers are competitive in their job seeker submittals, and which job codes have the largest variance in submitted rate to requested rate.

Variances show the percent (%) under or over the requested rate. Drilling into these variances allows you to determine if there is a supplier issue, a rate range issue, or if the rate card is in line and competitive.

In this interactive chart, you can select multiple points on the chart to analyze by using the cursor to draw a box around the desired group. From this chart, you can perform the following actions:

- Hover over a data point in the chart to view additional information.
- Click **Zoom to Selected Area** to view a larger chart area for the selected points.
- Click **View Selected Points** to display a list of job seekers in the selected area.
- Click a job seeker in the list to view the job seeker record.

Rates Benchmark

The Rates Benchmark chart displays work order rate variations by market tier for a specified job category. This graph indicates buyer-specific rate performance data using quartile calculations to evaluate performance by Job Posting Template (using the ONET Code).

The data is displayed, as follows:

- The amounts are converted to an hourly rate in the selected currency.
- Multiple tiers are displayed.
- The format is a box and whiskers graph using quartiles.
- An option that shows or hides outliers is available. When disabled, only outliers within the y-axis are shown.

Workers Charts

The available worker charts allow you to view worker information such as close reason, headcount, tenure, and spend. Depending on the chart, users may be prompted to filter worker data by location, job posting template, or supplier. You may also be prompted to enter a data source filter such as Job Posting or Statement of Work.

Worker Quality

The Worker Quality chart displays the number of workers per month by the close reason. This chart is used to compare suppliers based on the worker close reason allowing analysis of the ability of a supplier to provide quality, long-term workers. This chart also allows you to analyze when workers leave and provide close reasons most readily based on time of year. From this chart, you can perform the following actions:

- Click a chart element in the legend to remove or add the element to the chart.
- Hover over a chart element to view additional information.
- Click a chart element to view a list of workers for the rating and month. From the list, click a worker to view the worker record.

Contingent Worker by Headcount and Spend

The Contingent Worker by Headcount and Spend chart displays the past six months committed spend and worker counts, and the future pipeline for worker counts. Use this chart to review your current use, identify

usage and spend trends, and to gain insight into future committed utilization. From this chart, you can perform the following actions:

- Hover over the chart elements to view additional information.
- Click a chart element in the legend to remove or add elements to the chart.

Worker by Tenure and Spend

The Worker by Tenure and Spend chart displays tenure days and spend for active workers. This chart allows you to determine if tenure and rate card policies are followed. Use this chart to compare tenure to spend and identify anomalies along the trend line. This chart can be run across all active workers or limited by job posting title. From this chart, you can perform the following actions:

- Hover over a data point in the chart to view additional information.
- Click **Zoom to Selected Area** to view a larger chart area for the selected points.
- Click **View Selected Points** to display a list of workers in the selected area.

Worker Headcount and Spend by Location

The Worker Headcount and Spend by Location chart displays worker count, committed spend, and actual spend by geographical location. Use this chart to identify state, regional, or global headcount and spend.

To change the type of data displayed in the map, select an option in the Data field. Options are:

- # Workers
- Committed Spend
- Actual Spent

To change the geographical location, select an option in the Country/Region field. Options are based on each individual buyer.

Depending on the map type selected, you can click an area of the map to view a list of workers.

Job Posting Template Charts

Compare Job Posting Templates with SOW Worker Roles

The Compare Job Posting Templates with SOW Worker Roles chart allows users to view a side-by-side comparison of job posting templates and their corresponding SOW worker roles. Data includes the number of workers, the average rate, and the percentage of difference between the job posting template and the statement of work.

Click the percentage in a desired row to view the Job Posting Template Comparison chart.

Job Posting Response Rate

The Job Posting Response Rate chart shows the average number of job seekers received per position by your company, in comparison to the averages across all companies using SAP Fieldglass.

Use this chart to view the flow of job seekers to open job postings compared to the SAP Fieldglass all-company benchmark.

- The blue line is a benchmark representing all SAP Fieldglass customers while the green line represents the data of your company.

- Any dotted lines are trend lines through the respective averages.
- Click any point in the chart to view the response rate details for the top 10 and bottom ten suppliers, job posting templates, and sites.

Job Posting Response Dwindle

This chart displays the rate at which job seeker responses were received each day after a job posting was distributed. Use this chart to view the trend of daily submitted job seekers over a 10-day period.

This chart allows you to determine when most job seekers are submitted, whether the distribution rules are properly configured, and whether suppliers are submitting job seekers over the life of the open job posting. It shows the average number of responses per job posting over a period of time to help identify response trends.

- The blue line represents the trend for the period selected.
- The green line represents the trend for the year previous to the period selected.
- Hover over the data points to view additional information.

Services Charts

Statement of Work by Duration and Spend

The Statement of Work by Duration and Spend chart displays the actual spend or maximum budget for a specific statement of work template for the period selected.

- Hover over a data point in the chart to view additional information.
- Click **Zoom in on Selected Area** to view a larger chart area for the selected points.
- Click **View Selected Points** to display a list of SOWs in the selected area.

Top 10 Spend by Statement of Work

The Top 10 Spend by Statement of Work chart displays spend information sliced by the top ten suppliers, SOW and RFX templates, business units, cost centers, and sites.

Hover over a chart element to view additional information.

Cycle Charts

Cycle Times

The Cycle Times chart provides a snapshot comparison of the current cycle times of all major components against a selected previous period. Use this chart to determine company performance over 18 unique cycles. This chart compares the current period to a selected previous period and allows you to identify areas of improvement in business processes, approvals, supplier performance, hiring manager adoption, and other areas impacting cycle times.

- **Data Source** options are Job Posting or Statement of Work. Only one can be selected.
- Click a data element in the chart to view the line chart that displays the breakdown for that category.
- Click a data point in the line chart to view a list of all supplier cycle times for the category selected.

Monthly Cycle Time

The Monthly Cycle Time chart displays the monthly trend of cycle times over the selected period along with a breakdown by individual components. Use this chart to review monthly component and aggregate cycle times and identify anomalies by month or by cycle time component. The chart shows aggregate cycle times across the seven primary cycles measured in SAP Fieldglass as well as all of the components of cycle time over time.

- Hover over a data element to view additional information.
- Each color-coded bar displays specific components of the overall cycle time. Use the checkboxes in the legend to add and remove categories from the chart.

4.6 Visualizer Calculations

The data that displays in the dashboards and graphs of the Visualizer is computed with specific elements of Fieldglass. The definition of these elements is provided to help you clearly understand how the calculations are determined.

Job Posting Data Computations

Component	Definition
Estimated Spend	• Job Posting Estimated Spend • Job Posting Status is not equal to Draft • Amount is equal to the number of days in each calendar month between the start and end date of the Job Posting • Conversion to base currency uses Exchange Rate as of Job Posting End Date
Committed Spend	• Work Order/Work Order Revision Committed Spend • Work Order/Work Order Revision Status is not equal to Draft • Amount is equal to the number of days in each calendar month between the start and end date of the Job Posting • Conversion to base currency uses Exchange Rate as of Work Order/Work Order Revision End Date

Component	Definition
Actual Spend	Time Sheet: • Time Sheet Amount • Time Sheet Status is equal to Approved onwards • Grouped by the calendar month of the Time Sheet Submit Date Expense Sheet: • Expense Entry Amount • Expense Sheet Status is equal to Approved onwards • Grouped by the calendar month of the Expense Sheet Submit Date Credit/Debit Memo: • Credit/Debit Memo Detail Amount (excludes Adjustments) • Status is equal to Approved onwards • Grouped by the calendar month of the Credit/Debit Memo Submit Date Misc. Invoice: • Misc. Invoice Detail Amount (excludes Adjustments) • Status is equal to Approved onwards • Grouped by calendar month of Miscellaneous Invoice Submit Date
Average Responses per Position	• Number of Job Seekers submitted against the Job Posting divided by Number of Positions on the Job Posting • Job Posting Status is not equal to Draft • Job Seeker Status is not equal to Draft or Withdrawn • Grouped by calendar month of the Job Posting First Distribution Time
Job Posting Response Rate	Same as Average Responses per Position
# Job Postings	Number of Job Postings with Status is not equal to Draft falling in the selected period
# Workers	Number of Workers in the selected period
Worker Mean Rate	• Average of Work Order/Work Order Revision Rates used for Committed Spend calculation • All Work Orders/Work Orders Revision falling within the selected period are considered • Conversion to base currency uses Exchange Rate as of Work Order/Work Order Revision End Date
Work Order Mean Rate	Same as Worker Mean Rate

Statement of Work Data Computations

Component	Definition
Estimated Spend	• Statement of Work 'Do Not Exceed' from first sequence • Amount is equal to the number of days in each calendar month between the start and end date of the statement of work • Conversion to base currency uses Exchange Rate as of Statement of Work End Date
Budget	• Statement of Work 'Max Budget' from last sequence • Amount is equal to the number of days in each calendar month between the start and end date of the statement of work • Conversion to base currency uses Exchange Rate as of Statement of Work End Date
Actual Spend	Time Sheet: • Time Sheet Amount • Time Sheet Status is equal to Approved onwards • Grouped by calendar month of the Time Sheet Start Date Expense Sheet: • Expense Entry Amount • Expense Sheet Status is equal to Approved onwards • Grouped by calendar month of the Expense Sheet Entry Date Statement of Work Line Items (Schedules/Events/Fees): • Line Item Amount • Statement of Work Line Item Status is equal to Approved onwards • Grouped by calendar month of the Line Item Date Credit/Debit Memo: • Credit/Debit Memo Detail Amount (excludes Adjustments) • Status is equal to Approved onwards • Grouped by calendar month of the Credit/Debit Memo Submit Time Misc. Invoice: • Misc. Invoice Detail Amount (excludes Adjustments) • Status is equal to Approved onwards • Grouped by calendar month of the Misc. Invoice Submit Time
# SOWs	Number of Statements of Work that fall in the selected period

Component	Definition
# SOW Workers	Number of Statements of Work Workers in the selected period
Budget per SOW	Budget divided by the number of Statements of Work
Duration (days)	Average Duration of the Statement of Work
# SOWs Defined By	Number of Statements of Work that are either Buyer-defined or Supplier-defined or both

Worker Data Computations

Component	Definition
Tenure (days)	Days between Worker Start Date and (Worker End Date or today, whichever comes first)
Worker Quality	• Applies to Closed Workers • Based on the Closed Reason assigned, the Worker is classified as either Positive, Negative, Neutral, or Unrated (if Closed Reason was not mapped)

Supplier Data Computations

Component	Definition
Total Spend	• Sum of Invoice Amounts (including Adjustments) • Invoice Status is Approved, Payment Pending, Paid, Pending Consolidation, or Consolidated • Invoices here refer to all types of Invoices (EXAMPLES: Regular, Credit/Debit Memo, and Misc Invoices) • Excludes Time Sheets and Expense Sheets not yet invoiced • Excludes Statement of Work data • Conversion to base currency uses Exchange Rate as of Invoice Submit Time • Amounts grouped by calendar month of the Invoice Submit Time

Component	Definition
Overtime Spend	• Sum of Invoice Line Item Amounts for Rates flagged as Overtime or Double Time • Adjustments are not part of this calculation • Invoice Status is equal to Approved and onwards • Invoices here refer to Time Sheet Invoices and Time Sheet Credit/Debit Memos • Excludes Time Sheets not yet invoiced • Excludes Statement of Work data • Conversion to base currency uses Exchange Rate as of Invoice Submit Time • Amounts grouped by calendar month of the Invoice Submit Time
Engagement Length (days)	• Tenure Average of Worker • For definition, refer to Worker Data Computations • Workers falling in the selected period are considered
Bill Rate	• Average of latest Work Order/Work Order Revision Rates • Only Rates marked as Standard Time (ST) are considered • Work Order/Work Order Revision Status is equal to Accepted, Activated, or Confirmed • Conversion to base currency uses Exchange Rate as of Work Order/Work Order Revision End Date • Grouped by calendar month of the Work Order/Work Order Revision Accept Time
Supplier Rating	It is computed by averaging the percentages of the below eight Key Performance Indicators (KPIs)
# Job Seekers per Position	Refer to Average Responses per Position in Job Posting Data Computations
# Work Orders Accepted	Number of accepted Work Orders in the selected period
Worker Quality	• Applies to Closed Workers • Based on the Closed Reason assigned, the Worker is classified as either Positive, Negative, Neutral, or Unrated (if Closed Reason was not mapped)
Response rate	• Of all the Job Postings distributed to the Supplier, percentage of them that results in at least one Job Seeker being submitted • Job Seeker Status is not equal to Draft or Withdrawn • Grouped by calendar month of the Job Posting Distribution Time

Component	Definition
Hire rate	• For all the Job Postings distributed to the Supplier, percentage of them that results in at least one Work Order being created • Work Order Status not in Draft or Rejected • Grouped by calendar month of the Job Posting Distribution Time
Acceptance Rate	• Percentage of Work Orders created for the Supplier that result in the Work Order being accepted • Grouped by calendar month of the Job Seeker Submit Time
Departure Rate	• 100 minus (percentage of Work Orders that ended prior to the first Work Order End Date) • Grouped by calendar month of the Worker End Date
Worker Replace	• 100 minus (percentage of Work Orders that results in a replacement being done) • Grouped by calendar month of the Work Order Submit Time
Worker Extend	• Percentage of Workers that results in a Work Order Revision to extend the first Work Order End Date • Grouped by calendar month of the Work Order Accept Time
Candidate Quality	• Percentage of Job Seeker submitted by the Supplier that results in a Work Order being created • Job Seeker Status not in Draft or Withdrawn • Grouped by calendar month of the Job Seeker Submit Time
Rate Compliance	• Of all the Work Order Rates, percentage of Work Order Rates that are above the Job Posting Distribution Max Rate or below the Job Posting Distribution Min Rate • All Rate Types are considered for this calculation • Work Order Status is equal to Accepted and onwards • Grouped by calendar month of the Work Order Accept Time

Cycle Times

All Cycle Times refer to Job Posting data.

Component	Definition
Time to Approve Job Posting	• Time taken from Job Posting Create to Job Posting Approve • Job Posting Status is equal to Submitted, Closed, Pending Distribution, or Halted • Grouped by calendar month of the Job Posting Approved Time
Time to First Response to Job Posting	• Time taken from Job Posting Distribution to First Job Seeker Submit • Job Posting Status is equal to Submitted, Closed, Pending Distribution, or Halted • Job Seeker Status is not equal to Draft, Withdrawn • Grouped by calendar month of the Job Seeker Submit Time
Time to All Responses to Job Posting	Same as Time to First Response to Job Posting with one difference: All Job Seekers are considered instead of just the first one.
Time to Review Job Seeker	• Time taken from Job Posting Distribution to Job Seeker Review • Job Seeker Review Time is equal to Work Order Create Time or Job Seeker First View Time, whichever is earlier • Job Seeker Status is not equal to Draft or Withdrawn • Job Seeker has not been uploaded • Grouped by calendar month of the Job Seeker Review Time
Time to Create Work Order	• Time taken from Job Seeker Submit to Work Order Create • Work Order Status is not equal to Draft • Grouped by calendar month of the Work Order Create Time
Time to Approve Work Order	• Time taken from Work Order Create to Work Order Approve • Work Order Status is equal to Approved, Accepted, Activated, or Confirmed • Work Order Revision is not considered • Grouped by calendar month of the Work Order Approved Time
Time to Accept Work Order	• Time taken from Work Order Create to Work Order Approve • Work Order Status is equal to Approved, Accepted, Activated, or Confirmed • Work Order Revision is not considered • Grouped by calendar month of the Work Order Approved Time

Component	Definition
Time to Activate Work Order	• Time taken from Work Order Accept to Work Order Activation • Work Order Status is equal to Activated or Confirmed • Work Order Revision is not considered • Grouped by calendar month of the Work Order Activation Time
Time to Register Worker	• Time taken from Work Order Activation to Worker Registration • Work Order Status is equal to Confirmed • Work Order Revision is not considered • Grouped by calendar month of the Worker Registration Time
Total Work Order Time	• Time taken from Work Order Create to Worker Registration • Work Order Status is equal to Confirmed • Work Order Revision is not considered • Grouped by calendar month of the Worker Registration Time
Total Time for Buyer to Acquire	• Time to Approve Job Posting • Plus Time to Create Work Order • Plus Time to Approve Work Order • Plus Time to Activate Work Order
Time to Approve Time Sheets	• Time taken from Time Sheet Submit to Time Sheet Approve • Time Sheet Status is equal to Approved and onwards • Grouped by calendar month of the Time Sheet Approve Time
Time to Approve Expense Sheets	• Time taken from Expense Sheet Submit to Expense Sheet Approve Expense Sheet Status is equal to Approved and onwards • Grouped by calendar month of the Expense Sheet Approve Time
Time to Approve Invoices	• Time taken from Invoice Submit to Invoice Approve • Invoice Status is equal to Approved and onwards • Grouped by calendar month of the Invoice Approve Time
Time to Process Payment	• Time taken from Invoice Approve to Invoice Pay • Invoice Status is equal to Paid • Grouped by calendar month of the Invoice Paid Date
Time to Pay Supplier	• Time taken from Invoice Submit to Invoice Pay • Invoice Status is equal to Paid • Grouped by calendar month of the Invoice Paid Date

Thresholds

- All Thresholds are generated from Job Posting data.
- Growth percentage is computed by comparing the numbers for the selected period against the numbers for the same period in the previous year.

Component	Definition
Supplier Rating	• Shows list of Suppliers whose Rating is below the threshold value • For definition, refer to Supplier data calculations
Contingent Worker Rate Card Compliance	Shows list of Open Workers whose Standard Time Rate is above the Job Posting Distribution Rate by the threshold percentage
Contingent Overtime Spend	• Shows list of Suppliers whose Overtime Spend as percentage of the Total Spend for the selected period is above the threshold percentage • For Total Spend and Overtime Spend definitions, refer to Supplier data calculations • Corrections needed to the Total Spend definition for this calculation: 1. Include Approved Time Sheets 2. Exclude non Time Sheet Amount
Committed Spend for Supplier	Shows list of Suppliers whose Committed Spend is above the threshold value
Committed Spend growth	Displays when Committed Spend growth percentage is above or below the threshold value
Committed Spend growth for Job Posting Template	Shows list of Job Posting Templates whose Committed Spend growth percentage is above or below the threshold value
Committed Spend growth for Site	Shows list of Sites whose Committed Spend growth percentage is above or below the threshold value
Contingent Headcount	• Shows count of Open Workers if it is above or below the threshold value • Direct Hire Workers are not considered
Contingent Headcount growth	Displays when Headcount for entire Company is above the threshold value
Contingent Headcount growth for Job Posting Template	Shows list of Job Posting Templates whose Headcount growth percentage is above or below the threshold value
Contingent Headcount growth for Site	Shows list of Sites whose Committed Spend growth percentage is above or below the threshold value
Job Posting Response Rate	• Shows list of Suppliers whose Average Responses per Position are below the threshold value • For definition, refer to Job Posting data calculations
Job Posting Response variance against all of Fieldglass	Compares Average Responses per Position against all of Fieldglass numbers

Component	Definition
Job Posting Response variance against previous month	Compares Average Responses per Position for current month against the previous month

Landing Page

The period for which data is displayed on this page can be set through backend only. Options are (a) YTD, (b) MTD, (c) Number of months to go back.

Current Snapshot

Component	Definition
Job Postings	Number of Job Postings that have Open Workers
Headcount	Number of Open Workers (for Job Posting only)
Remaining Spend	• Committed Spend minus Actual Spend for Open Workers • For definitions, refer to Job Posting data calculations • Conversion to base currency may not be working
SOWs	Number of Open Statement of Works
SOW Headcount	Number of Open Statement of Work Team Members
Remaining SOW Budget	• Budget minus Actual Spend for Open Statements of Work • For definitions, refer to Statement of Work data calculations • Conversion to base currency uses Exchange Rate as of Statement of Work End Date
Profile Worker Headcount	Number of Open Profile Worker
User Headcount	Number of Open Users

Forecast

Component	Definition
Job Posting: Counts	Number of Job Postings with Status is not equal to Draft, Submitted, or Closed
Job Posting: Headcount	• Number of Positions from approved Job Postings, which do not have a Work Order created against it • Number of approved Work Orders against which Worker has not registered yet

Component	Definition
Job Posting: Spend	• Estimated Spend from approved Job Postings, which do not have a Work Order created against it • Conversion to base currency uses Exchange Rate as of Job Posting End Date • Committed Spend from approved Work Orders against which Worker has not registered yet • Conversion to base currency uses Exchange Rate as of Work Order Start Date
Profile Worker: Headcount	Number of profile workers in pending approval and approval paused state
SOW: Counts	Number of Statements of Work that are not yet approved
SOW: Spend	• 'Do Not Exceed' from Statements of Works that are not yet approved • Conversion to base currency uses Exchange Rate as of Statement of Work End Date

Biggest Spenders & Gainers

Biggest Spenders

Component	Definition
Job Posting and Statement of Work	Supplier, Site, and Title with the largest committed spend of the company for a defined date range

Biggest Gainers

Component	Definition
Job Posting	Supplier, Site, and Title where the committed spend has grown the most by percent for a defined date range for Job Posting. The date range is compared against the same period for the previous year.
Statement of Work	Supplier, Site, and Template where the committed spend has grown the most by percent for a defined date range for Statement of Work. The date range is compared against the same period for the previous year.

Dashboards

Job Posting Template Dashboard, SOW section | SOW details for Roles mapped to this Template – This section provides metrics for statement of work team members with roles mapped to the selected Job Posting Template.

Component	Definition
# SOW Workers	Number of Open Statement of Work Team Members

Component	Definition
# SOWs with these Workers	Number of Statements of Work that these Team Members belong
SOW Worker Mean Rate	• Average of Work Order/Work Order Revision Rates used for Committed Spend calculation • All Work Order/Work Order Revision falling within the selected period are considered • Conversion to base currency uses Exchange Rate as of Work Order/Work Order Revision End Date

Work Order Rate Analysis

Data is grouped by Work Order Accept Time (if there is none, then Work Order Start Date is used).

Component	Definition
# Job Postings	Number of Job Postings with Job Posting Status is not equal to Draft and has a Work Order accepted in that month
# Work Orders	• Number of Work Orders accepted in that month • Work Order Status is equal to Accepted, Activated, or Confirmed • Work Order Revision is not considered
Rate	• Average of Work Order Rates • Only Rates marked as Standard Time (ST) are considered • Daily Rates are converted to Hourly
Min/Max Template Rate	Job Posting Distribution Min/Max Rate

Job Seeker Rate Analysis

Component	Definition
# Job Postings	Number of Job Postings with Job Posting Status is not equal to Draft and has a Job Seeker submitted in that month.
# Job Seekers	• Number of Job Seeker submitted in that month • Status is not equal to Draft or Withdrawn
Rate	• Average of Job Seeker Rates • Only Rates marked as Standard Time (ST) are considered • Daily Rates are converted to Hourly
Min/Max Template Rate	Job Posting Distribution Min/Max Rate

Job Seeker Rate Outlier

Component	Definition
Rate	• Job Seeker Rate • Only Rates marked as Standard Time (ST) are considered • Conversion to base currency uses Exchange Rate as of Job Seeker Submit Time
Max Rate	• Job Posting Distribution Max Rate • Conversion to base currency uses Exchange Rate as of Job Seeker Submit Time
Rate Variance %	• (Job Posting Distribution Max Rate minus Job Seeker Rate) multiplied by 100 divided by Job Posting Distribution Max Rate • Displays those Rates where Variance is greater than or equal to 5 percentage or less than or equal to minus 5 percentage

Compare Job Posting Templates with Statement of Work Team Member Roles

Displays only those Job Posting Template entries for which a mapping exists from a Statement of Work Team Member Role.

Component	Definition
# Workers	Number of Workers that fall in the selected period
Average Rate	• Shows the Work Order/Work Order Revision Rate used for Committed Spend calculation from the latest Work Order for the Workers that fall in the selected period • Conversion to base currency uses Exchange Rate as of Work Order/Work Order Revision End Date • Need to convert Daily to Hourly Rate
Rate Delta	(Average Job Posting Template Rate minus Average Statement of Work Team Member Rate) multiplied by 100 divided by average Job Posting Template Rate

Job Posting Response Dwindle

- Job Postings with Submit Time in the selected period are considered.
- 'Average Responses' are grouped by the by Response Days. For Response Days greater than nine, it is all grouped as 10 days.

Contingent Worker by Headcount and Spend

Component	Definition
Open Workers	Number of Open Workers for selected period (for both Job Posting & Statements of Work)
Requisitioned New Workers	Number of Positions from Job Postings not yet approved having Job Posting Start/End Date falling in the selected period
Approved New Workers	Number of Positions from approved Job Postings having Job Posting Start/End Date falling in the selected period and against which no Worker has yet registered
Selected New Workers	Number of Work Orders having Work Order Start/End Date falling in the selected period and Worker has not yet registered
Forecasted Workers	• Requisitioned New Workers • Plus Approved New Workers • Plus Selected New Workers
Committed Spend	Committed Spend for Workers that fall in the selected period

Glossary

Component	Definition
ST/OT/DT Rates	Consists of: (a) Predefined Standard Time/Overtime/Double Time Rate, or (b) Rate Category that is marked with Standard Time (ST)/ Overtime (OT)/Double Time (DT) as Rate Type
Spend	Generally refers to Actual Spend

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