

## Fieldglass Quick Reference Guide for Suppliers

### Accessing Fieldglass

To access Fieldglass open a web browser and go to

[www.fieldglass.net](http://www.fieldglass.net)

Enter your **Username**

Enter your **Password**

Click **Sign In**

To add additional users to your account:

From the **Fieldglass Homepage** select the gear button on top right of page



From the Admin page, Click **User** under User Column on the user page click **New** on the top right of page

Complete all required Fields and Click Add

The new user will receive an email with a registration link for them to register/link their accounts to an existing account

### Reviewing Job Postings

New Job Postings will show up in your Work Items on the top right of the Fieldglass Homepage.

Click **Respond** under Job Postings

This will bring up a list of job postings you have yet to respond to.

Select the **Job Posting ID** of the job posting you would like to review

You can also review job postings by clicking **View-Job Postings**

This will bring up a list of job postings

Select the **Job Posting ID** of the job posting you would like to review

Go to the next page to see instructions on how to submit a candidate

### CONTACT INFORMATION

#### Contingent Labor Management (CLM) Program

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### Chat Functionality

The Chat Functionality in Fieldglass is an easy way for you to communicate with the CLMP directly on any Job Posting or Work Order.

Just click the **Chat** button on the top right of any Job Posting or Work Order

Type in the message you would like to send to the CLMP

Click **Save**

→ **Save**

You will also receive chats to your email and can respond in Fieldglass or directly from your email.

**All messages are saved on the work order or job posting for documentation purposes.**

### Creating a Workforce

Creating a Workforce is used to add a candidate to Fieldglass without submitting them to a Job Posting. This is also used for pre-identified candidates. To Create a Workforce:

From the **Fieldglass Homepage** Click **Create** and then **Workforce**

Complete the Required Fields:

- **Code** (Optional)
- **First Name**
- **Last Name**
- **Employee ID**
- **Designation**
- **Unavailable Dates**
- **Visible to all Buyers?**
- **Attach Resume**
- **Pay Rate**
- **Bill Rate**
- **Add Qualifications**

Resume/CV (optional)

→ **Attach**

Click **Continue**

Review Workforce Summary

Click **Submit**

## Fieldglass Quick Reference Guide for Suppliers

### Submitting a Candidate

#### To submit an existing candidate:

From the Job Posting Details Page click **Submit Existing**

You will need search for your existing candidate

Select the Worker ID/Workforce ID for the candidate

you would like to submit.

Complete the required fields:

- **Available Date\***
- **Submitted to other postings\***
- **Worker Pay Type\***
- **Attach Resume\***
- **Has this person previously been a worker of Chevron?\***
- **Chevron Referred Candidate?\***
- **Worker Type\***
- **Pre-Identified Candidate?\***
- **Add Qualifications**

Click **Continue**

- **Final Bill Rate**

Review Submit Job Seeker Page

Click **Submit**

**Job Posting** CVXMJP000000

CLP-Analyst/Developer - Gener

Period 2015-09-21 to 2016-09-21 Status Submitted

**Submit New**

**Submit Existing**

- **Confirm SecurityID\***
- **Available Date\***
- **Submitted to other Job Postings\***
- **Worker Pay Type\***
- **Attach Resume\***
- **Has this person previously been a worker of Chevron?\***
- **Chevron Referred Candidate?\***
- **Worker Type\***
- **Pre-identified candidate?\***
- **Add Qualifications**

Click **Continue**

- **Final Bill Rate**

Review Submit Job Seeker Summary Page

Click **Submit**

Search Workers/Workforce

Enter search criteria and click 'Search' in order to see

Search Results

| Worker/Workforce ID | Name         |
|---------------------|--------------|
| CVX1WK00000230      | Manning, Eli |

**Continue**

**Submit**

#### To submit a new candidate:

From the Job Posting Details page click **Submit New**

Complete the required fields:

- **First Name\***
- **Last Name**
- **Security ID\*(MMDDFFLLNNNN)**  
M= Month of Birth, D=Day of Birth, F=First 2 of first name, L=First 2 last name, N=Last 4 of Phone #

**Continue**

**Submit**

### Coordinating an Interview

If a Chevron engagement manager schedules an interview with a candidate you submitted, you will receive an email and the request will appear in your **Work Items**

#### To accept an Interview Time:

From the Fieldglass Homepage Click **Work Items** and select **Accept** under **Interview/Meeting Schedule**

Review the Interview Request details.

#### To Decline:

Select **Decline**

Enter reason in Comments

You may also propose multiple new times

(if new times are proposed the request will route back to the engagement manager to propose that time)

#### To Accept:

Select **Accept**

(if Phone interview, enter in number for interviewer to call)

Enter any Comments

Select Time

Click **Accept**

**Interview Schedule**

Lauer, Matt (S248JS00000118)

Scheduler PMO User Status Submitted Next Step Accept

**Accept**

**Decline**

**Accept**

### Accepting a Work Order

When your candidate is selected for Hire you will receive a chat notifying you that a work order is being created so may start prescreening process. Once created, the Work Order will show in your **Work Items**.

**To Respond:** From the **Fieldglass Homepage** click **Work Items** and **Accept** under **Work Order**,

This will bring up a list of Work Orders you need to respond to. Select the **ID** of the work order you wish to respond to.

#### To Reject:

Click **Decline**

Select a **Reason** from the Dropdown

Enter any Comments

Click **Decline**

**Decline**

#### To Accept:

Click **Accept**

Complete the Required Fields:

- **Supplier Reference** (For your internal systems)
- **Worker Email**
- **Has this person previously been a worker of Chevron?**
- **Pay Rate**
- **Any Adjustments**

Click **Continue**

Review the Summary Details of the Work Order

Click **Accept**

**Continue**

**Accept**

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Work Items Message

Job Posting

Respond 3

Work Order

Accept 1

Work Order Revision

Accept 1

Worker Activity

Mark as Complete 43

### Completing Onboarding Items

Once you have accepted the Work Order you will be assigned Onboarding items to complete prior to your worker being activated.

To mark the onboarding items completed:

From the **Fieldglass Homepage** click **Work Items** and select **Mark as Completed** under **Onboarding**.

This will bring up a list of Onboarding Items that need to be completed.

Select the **Action** you would like to Mark as Completed.

Click **Mark as Completed**

**Mark as Completed**

Enter **Completion Date**

Enter any Comments

Click **Update**

Received Action

2016-09-12 12:00 AM

Ensure the application screening process has been completed

**Update**

- Any new worker, upon registering with Fieldglass is required to **enter their CAI** during the process.
- Please ensure that your worker completes this field as part of your onboarding process.

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Work Items Message

Job Posting

Respond 3

Work Order

Accept 1

Work Order Revision

Accept 1

Worker Activity

Mark as Complete 43

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**Confidential and Proprietary**

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### Submitting Timesheet

Timesheets are to be entered Weekly by 12PM Local Time on Mondays. The Supplier is responsible for training workers on how to submit timesheets. The Supplier is able to submit time on their behalf.

From the **Fieldglass Homepage** Click the **Workers** shortcut. Select the **Worker ID** for the contract worker you wish to submit time for. Click the **Time & Expense** Tab from the Contract Worker **Details** Page.

Welcome Supplier User

Workers 46

CVX1WK00000225

Woods, Tiger

Period: 2016-05-09 to 2016-09-30 | Status: Open | Job Posting: MSP/Administrative Assis

Actions: Details, Manage, Revisions, Rating, **Time & Expense**

Time Sheets

| Status | ID             | Revision |
|--------|----------------|----------|
| All    |                |          |
| Draft  | CVX1TS00004242 | 0        |

Click **Edit**

Complete the Timesheet by entering the total hours for each day of that pay period and for each Cost Center (If multiple are associated to the worker)

Click **Submit**

### Submitting an Expense

Expenses must be submitted within 30 days of being incurred. The Supplier is responsible for training workers on how to submit expenses. The Supplier is able to submit expenses on their behalf.

From the **Fieldglass Homepage** Click the **Workers** shortcut. Select the **Worker ID** for the contract worker you wish to submit an expense for. From the **Actions** dropdown, Select **Create Expense Sheet**

Welcome Supplier User

Workers 46

Peterson, Josh

Period: 2015-09-01 to 2016-08-01

Actions: Edit Worker, **Create Expense Sheet**, Update Workforce, Reset Password

Select the appropriate **Expense Code**. (If code is not available contact the CLM Program office to have the engagement manager associate to your worker.)

Complete Required Fields:

- **Date**
- **Merchant**
- **Amount**
- **Description**
- **Attachments** (Receipt is required if applicable)
- **Have you attached a receipt for all expenses listed on this report?**

Click **Submit**

Click **OK**

Multiple expenses may be on a single expense sheet as long as all expenses are for the same cost center. If multiple cost centers need to be expensed against you will need to create a separate expense sheet.

### Timesheet Revisions

Timesheet Revision can be created by the supplier to correct errors on a timesheet if the timesheet is in invoiced status (invoice is not in rejected status). From the **Fieldglass Homepage** click **View** and select **Timesheet** under **Worker**.

This will bring up a list of timesheets and their status.

|          |                |   |              |
|----------|----------------|---|--------------|
| Approved | CVX1TS00004072 | 0 | Woods, Tiger |
| Invoiced | CVX1TS00004071 | 0 | Woods, Tiger |
| Invoiced | CVX1TS00004070 | 0 | Woods, Tiger |

Select the **Timesheet ID** of the timesheet you would like to revise. From the **Action** tab select **Revise**. Make Necessary Changes to Timesheet

Click **Submit**

**Submit**

### Work Order Revision Process

Work Order Revisions are for any changes to the work order. There are 2 different type of revisions

- **Budgetary**-(changes to Owner, Billable days per month, rate, or extension)
- **Non-Budgetary**- (Any other changes to the Work Order)

Work order Revision is created by a Chevron Engagement Manager and once all approvals have been made it will be routed to you for acceptance.

**To Approve the Revision:** From the **Fieldglass Homepage** click **Work Items** and select **Accept** under **Work Order Revision**

This will bring up a list of revisions that require your acceptance. Select the **Revision ID** for the revision wish to accept. Review the details of the revision. Click **Accept**

O'Day, Darren

Period: 2015-09-01 to 2016-09-01 | Status: Created | Next Step: Accept

**Accept** | Decline | More Actions

308 Work Items | 1 Messages

Job Posting: Respond 188

Work Order: Accept 8

**Work Order Revision: Accept 1**

Worker Onboarding: Mark as Complete 111

You will need to accept or decline all work order revisions whether they are budgetary or not. If they are budgetary they will be routed to Ariba through integration to update the Service Order.

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## Fieldglass Quick Reference Guide for Suppliers

### How to Submit an Invoice

You as a supplier are responsible for submitting your own invoices **On Demand** for **Approved time and expense** at least once monthly  
From the **Fieldglass Homepage**  
Click **Create** and **Invoice** under **Payments**

This will bring you to the **Invoice Generator** page where you can **Select Schedule**  
You can invoice for either **Time** or **Expense**

#### To invoice time:

Select the time period end date  
Click **USD Invoice Billing Schedule (Time)**

#### Invoice Generator - Select Schedule

##### Buyer Schedules

| Buyer | March 2016                                                         |
|-------|--------------------------------------------------------------------|
|       | <a href="#">USD Invoice Billing Schedule Time</a><br>2016-03-22    |
|       | <a href="#">USD Invoice Billing Schedule Expense</a><br>2016-03-22 |

#### To invoice expense:

Select the time period end date  
Click **USD Invoice Billing Schedule (Expense)**

This will bring up a list of timesheets/expense sheets that you can invoice against.

Select the workers you would like to submit an invoice for. (to select all click the ☐ button next to status)

#### Invoice Generator - Select Worker

| Invoice Billing Schedule: (CVX1 - USD Invoice Billing Schedule)              |                |                                  |
|------------------------------------------------------------------------------|----------------|----------------------------------|
| End Date                                                                     | 2016-03-22     | Description                      |
| Item Type                                                                    | Time & Expense |                                  |
| <a href="#">Select a maximum of 100 items</a> 6 out of 100 possible selected |                |                                  |
| <input type="checkbox"/>                                                     | Status         | ID Worker                        |
| <input type="checkbox"/>                                                     | All            |                                  |
| <input checked="" type="checkbox"/>                                          | Submitted      | CVX1WK00001768 Cutler, Jay       |
| <input checked="" type="checkbox"/>                                          | Submitted      | CVX1WK00001881 Iguodola, Andre   |
| <input checked="" type="checkbox"/>                                          | Submitted      | CVX1WK00001877 Looney, Kevon     |
| <input checked="" type="checkbox"/>                                          | Submitted      | CVX1WK00001793 Ryan, Jillian     |
| <input checked="" type="checkbox"/>                                          | Closed         | CVX1WK00001880 Speights, Mareese |
| <input checked="" type="checkbox"/>                                          | Submitted      | CVX1WK00001876 Thompson, Klay    |

#### Click Next

This will bring up a list of all timesheets/expense sheets to invoice (only approved timesheets/expenses can be invoiced).

#### Click Next

| Submit Date | Status | Next Step | Worker                            |
|-------------|--------|-----------|-----------------------------------|
| -           | -      | None      | worker, EMCBS_0223 CVX1WK00001795 |

☒ Invoice -

#### Click Edit

#### Click Submit

*This Edit & Submit process will need to be repeated for each worker that an invoice is being submitted for. We are in process of working with Chevron to improve this process.*

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### Adding Chevron Specific Reason Codes

As communicated in supplier training, Suppliers are required to utilize reason codes (for rejections/withdrawals that have been approved by Chevron. This is to keep reason codes consistent for reporting purposes.

As part of the Implementation, you will be required to add in these required reason codes by April 11<sup>th</sup>. To add them:

From the **Fieldglass Homepage** select the **Admin** gear button at the top right of the page.

Click **Reason** under **Configuration**

- Configuration**
- [Custom Field](#)
- [Custom Field Pick List](#)
- [Invoice Tax Information](#)
- [Rate Change Matrix](#)
- [Reason](#)
- [Remit-to Address](#)



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Help ▾

User, Supplier | S248 ▾

Sign Out

WORK ITEMS ▾ 19

Search by ID or text

Customize

Print

New

Click **New** in top right corner of page.

Enter the Chevron Approved Reason Codes Listed below by **Module**:

#### Job Posting:

- Decline- Job Posting not in Scope-Location
- Decline- Job Posting not in Scope- Labor Type

#### Work Order

- Decline- Does not meet onboarding requirements
- Decline- Work Order contains incorrect dates
- Decline- Worker Declined Position
- Decline-Worker Declined Extension/Revision
- Decline- Work Order Contains incorrect dates
- Decline- Worker no longer available for extension/revision

#### Job Seeker

- Withdrawn- Job Seeker no longer available
- Withdrawn-Job Seeker no longer interested in assignment
- Withdrawn- Job Seeker submitted in error

Select the **Module**  
Select the **Type**  
Insert the **Name** (Reason)  
Click **Add**

Add

Cancel

Module \* Job Posting ▾

Type \* Declined ▾

Name \*

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