

Supplier administrator account setup

Introduction

To charge fees to CN you will need to create and maintain user accounts for your employees in the Fieldglass application. The following document will show you how to set up your supplier administrator account.

Set up a Fieldglass Supplier Administrator Account**1. Section Overview**

To successfully setup your supplier administrator account, there are three steps you must complete:

- Set Password Policy
- Create User Roles
- Create Reason Codes

For all other sections, please contact Fieldglass for further information. You can also find information about training sessions and contact information for Fieldglass support.

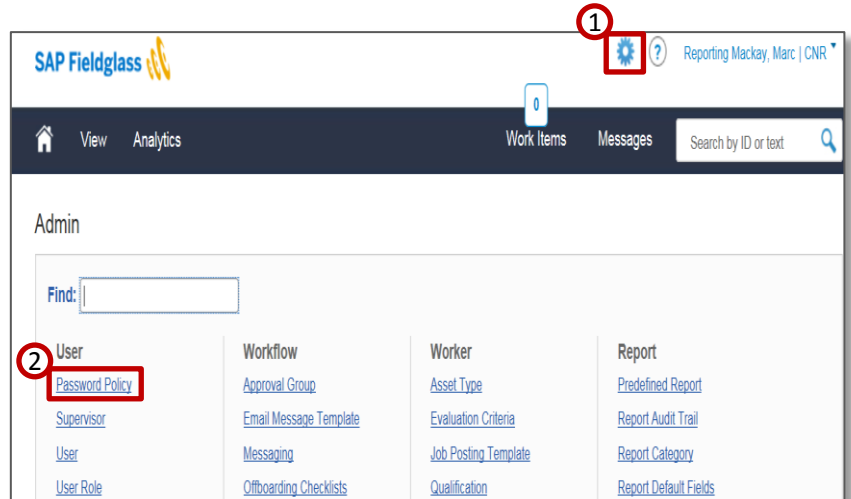
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2. Set Password Policy

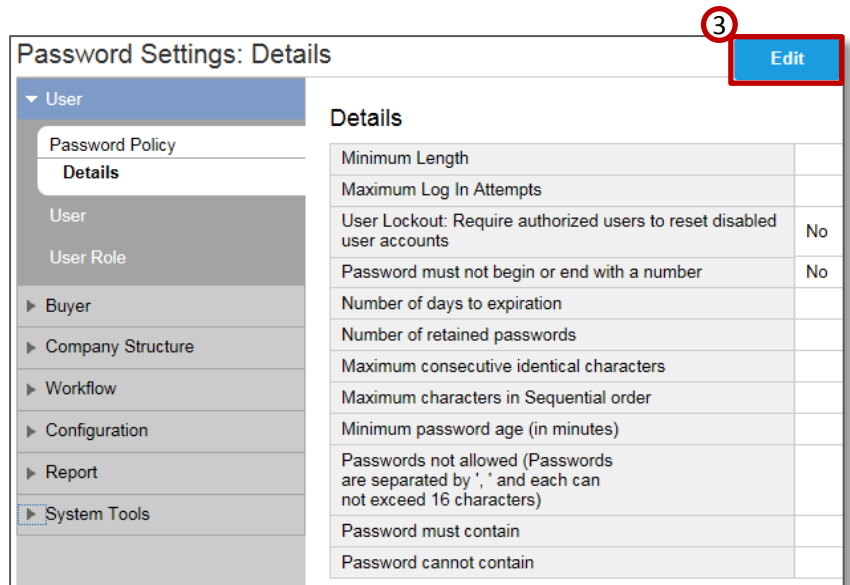
When setting up your account the password policy is blank. You must set the password policies for your users in Fieldglass.

To set the **Password Policy**:

1. In the top right corner of the Fieldglass application, click the **Administrator Settings** link.
2. Click **Password Policy**.



3. In the **Administration** page, click **Edit**.



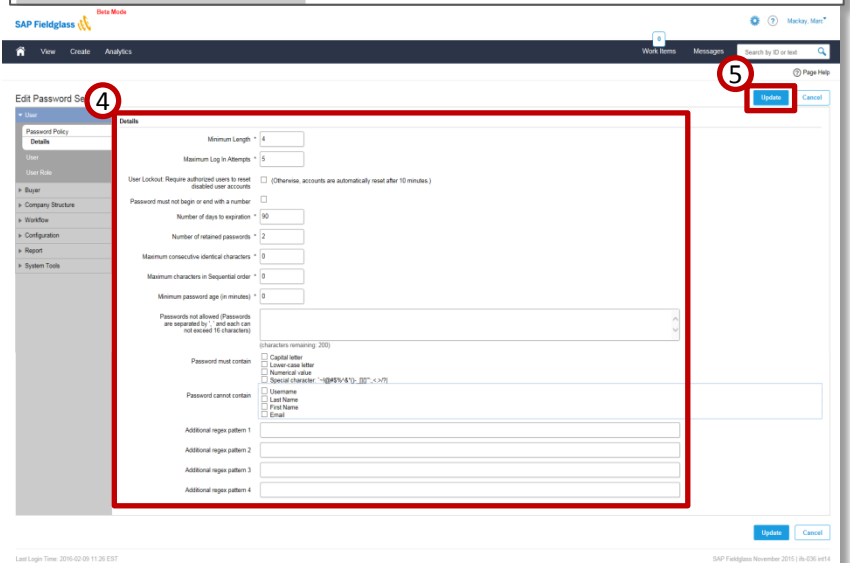
4. There are default settings when you open the edit page.

You can accept these defaults or change them to your company's standards.



Note: All fields marked with an * are mandatory.

5. Click **Update**.



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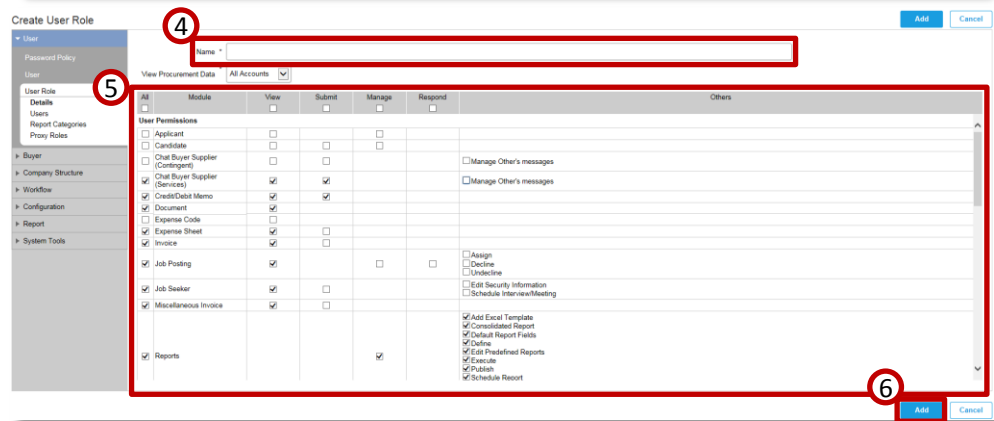
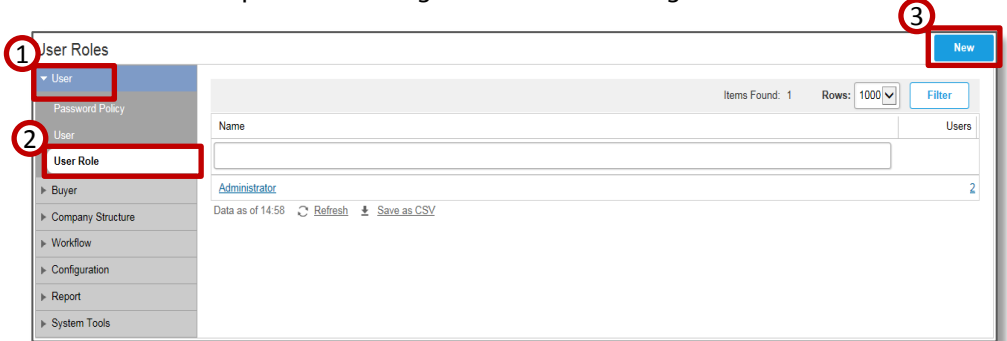
3. Create User Roles

A user role defines the access, permissions and activities a user can perform in Fieldglass. Each user is assigned to a user role.

We recommend that you create your user roles as defined in the section below. This user role will allow for submitting fees, Credit/Debit Memos and assign Workers against SOWs, responding to SOW revisions, and basic reporting.

To create User Roles:

1. In the **Administration** page, click the arrow next to the **User** section to open the menu.
2. Click **User Role**.
3. Click **New**.
4. Enter the **Name** as General User.
5. Select the **Permission(s)**. Check the appropriate boxes as defined below.



List of User Permissions

The following is a list of permissions, and their respective modules, that you can give a standard User:

User Permissions:

- Chat Buyer Supplier (Services) (View, Submit)
 - Credit/Debit Memo (View, Submit)
 - Document (View)
 - Expense Sheet (View)
 - Invoice (View)
 - Job Posting (View)
 - Job Seeker (View)
 - Miscellaneous Invoice (View)
 - Reports (Manage) – Please ensure all the content under the **Others** column are checked (see Picture)
 - SOW Credit/Debit Memo (View, Submit)
 - SOW Invoice (View, Submit)
 - SOW Line Item (View Submit)
 - Statement of Work (View, Respond)
 - Time Sheet (View)
 - Work Order (View)
 - Worker (View)
 - Workforce (View, Submit, Manage, Respond)
6. When you are finished, click **Add**.

Administrative Permissions

- Business Unit (View)
- Buyer (View)
- Company Details (View)
- Invoice Tax Information (View)
- Job Question (View)
- Onboarding and Offboarding (View)
- Password Policy (View)
- Qualifications (View)
- Rate Change Matrix (View)
- Rate Structure (View)
- Reason (View)
- Remit-to Address (View)
- Report Category (View)
- Storefront (View)
- Supplier Account (View)
- Thresholds – Escalations (View)
- User (View)
- User Role (View)

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4. Create Reason Codes

For the approval flows for Statements of Work Revisions to work correctly, you will need to create reason codes.

The reason codes below will allow you to reject an SOW Revision if there is a discrepancy that will prevent you from submitting a Fee correctly.

To create **Reasons**:

1. In the **Administration** page, click the arrow next to the **Configuration** section to open the menu.
2. Click **Reason**.
3. Click **New**.
4. Select the SOW Revision **Module** for which you want to create a reason.
5. Enter Declined for the **Type**.
6. For the **Name** enter one of the following reasons:
 - a. Missing rate definition
 - b. Incorrect Fee definition
 - c. Incorrect Fee rate
7. Click **Add**.

Repeat these steps for each of the three reason codes.



Note: Reasons are used when rejecting an SOW revision or when submitting a Credit/.Debit memo for example, Without any reason setup, you will not be able to do the above actions.