

Fieldglass User Account Navigation and Management

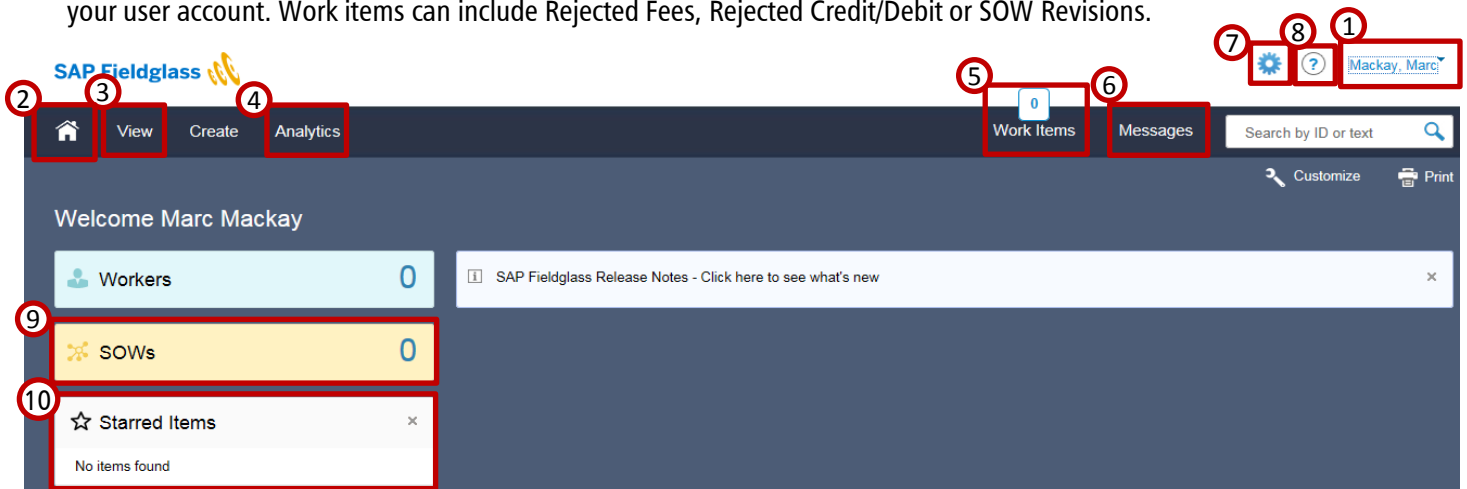
Introduction

This Job aid explains how to navigate through the Fieldglass application and manage your user account.

Basic Navigation

1. Navigation

2. Your user username is located in the top right hand corner of the Fieldglass page. Click your username to change personal options or to customize options.
3. The **Home** page (or Fieldglass desktop) is your starting point within Fieldglass. Click the **Home** menu at any time to return to the Fieldglass desktop.
4. Use the **View** menu to locate and view items such as Payments, Workers, and other info.
5. Use the **Analytics** icon to view or create **Reports**.
6. Use the **Work Items** menu to display a list of current items that require your action in Fieldglass. The number above Work Items represents the number of actions pending your response. Click the **Work Items** menu to view all active work items for your user account. Work items can include Rejected Fees, Rejected Credit/Debit or SOW Revisions.



7. Use the **Message Center** icon to view a list of messages that have been sent to you. Messages opens the message center. For more information on the Message Center, please see the **Message Center** section on page 19.
8. Use the **Admin** Icon to open the **Admin** page where you will find links to various administrator settings, such as **Password policy** and **User roles**. You must have administrator rights to make changes to these settings.
9. Use the **Help** icon to access Online Help, Release notes, and Reference Libraries. The Help menu also lets you view contact information for support and the Fieldglass application version.
10. The **SOWs** button will be where you will access all active Statements of Work against which fees will be submitted for review and approval for work performed.
11. The **Starred Items** button will be where you access all items you marked with a star. This will let you have quick access to any SOWs, Credit/Debit Memos, and other items you want to keep track of. For more information on displaying Starred Items on your home page, please see the **Customizing your Home Page** section on page 8.

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2. ID Naming Convention

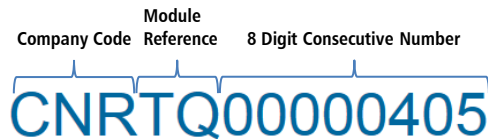
Introduction

Fieldglass is organized by modules. Modules are groups of related items or transactions. For example, SOWs and Invoices are two modules within the Fieldglass application.

Every transaction within a module is assigned a unique ID number for tracking. For example, when an SOW is created, it is assigned a unique ID number. Fieldglass uses a consistent convention for assigning ID numbers.

ID Naming Convention

ID numbers are comprised of three separate components:



1. The Company Code is **CN's ID**.
2. The module reference indicates the type of item. For example, **TQ** is used for a Statement of Work and **CD** for Credit/Debit Memo.

For more information on Module References, please refer to the table on this page.

3. The 8 digit consecutive number is a unique number that is assigned sequentially by the fieldglass application.

The table lists the module reference codes that are used by CN within Fieldglass.

Understanding the ID naming convention will help you easily locate the items you are looking for. In addition, when you contact the Fieldglass Helpdesk for support, you will be asked for the ID number of the item you need assistance with.

Module Reference Codes	
Reference Code	Module
TQ	Statement of Work
CD	Credit/Debit Memo
TU	Statement of Work Fee
PE	Statement of Work Event
PC	Statement of Work Credit Demo
PI	Statement of Work Invoice

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Managing your Account

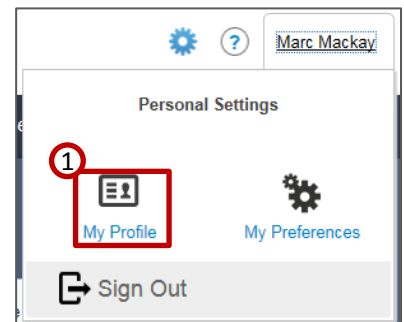
1. Introduction

Editing your profile is a quick and easy way to update your account information.

2. Section Overview

In this section you will learn to:

- Change your Password
- Use the Message Center
- Update Email and Contact Information
- Update your profile settings
- Customize your Home Page
- Add or change Proxy Information



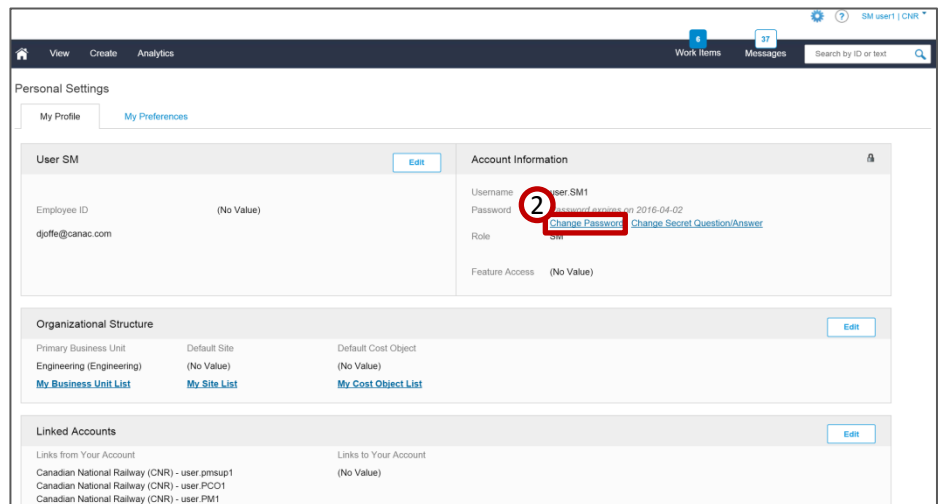
3. Changing your Password

To change your Fieldglass application Password:

1. Click your username in the top right and select **My Profile**.

The **Personal Settings** page opens, with the **My Profile** tab displayed.

2. Click the **Change Password** link in the **Account Information** section.

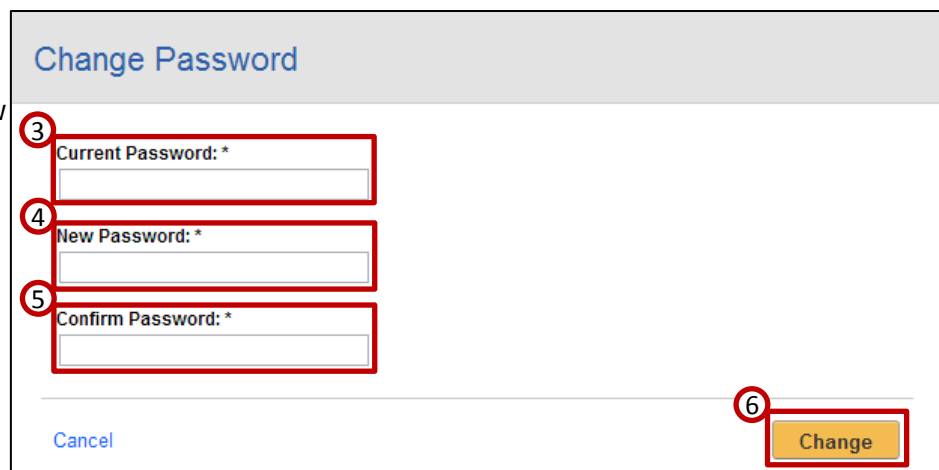


3. In the **Current Password** field, enter the password you used to log in.

4. In the **New Password** field, enter your new password.

5. In the **Confirm Password** field, enter your new password again.

6. Click **Change**.



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4. Message Center

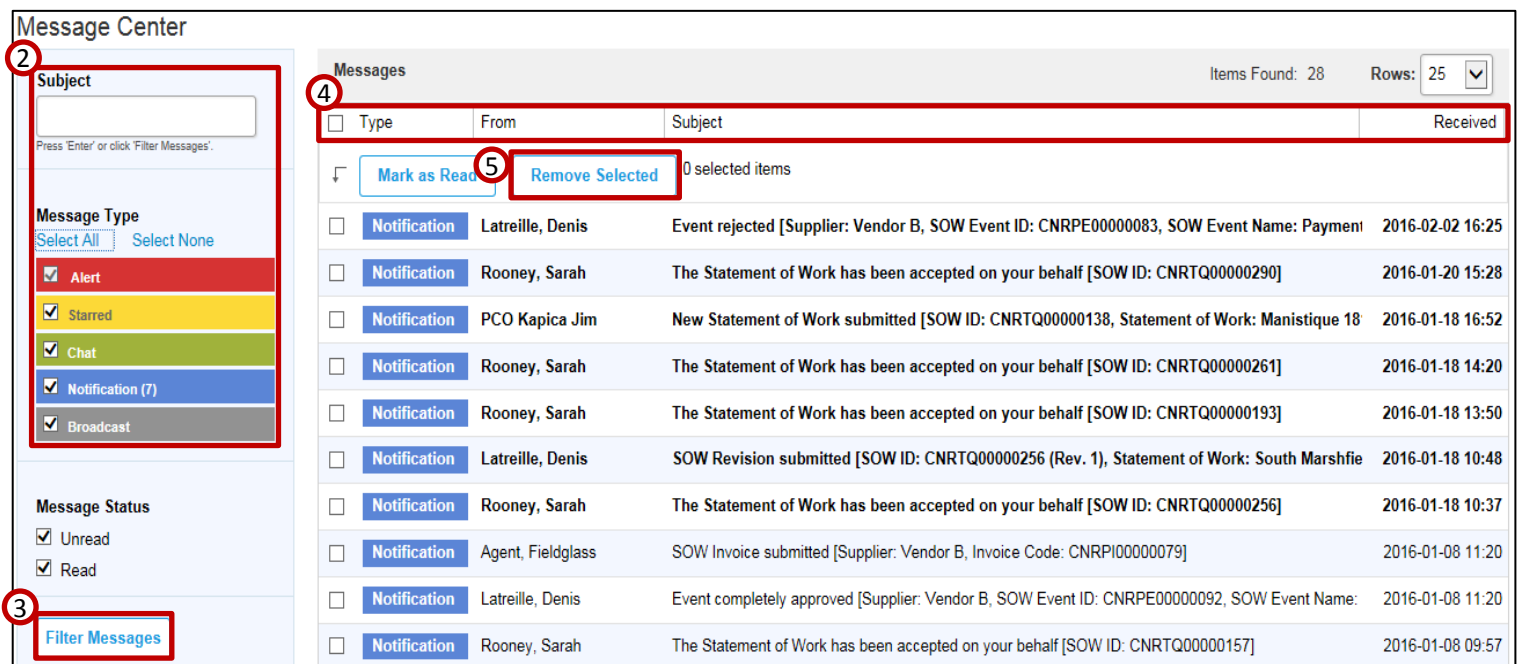
Introduction

The Fieldglass application sends messages to users notifying them when there are items requiring their attention. For example, you may receive a message when a Statement of Work has been submitted by CN or a fee has been rejected.

Viewing Messages

To view messages in the Message Center:

1. Click the **Message Center** () icon in the upper-right corner of the Fieldglass page.



Message Center

Messages Items Found: 28 Rows: 25

2

3

4 Type From Subject Received

5 0 selected items

Type	From	Subject	Received
Notification	Latreille, Denis	Event rejected [Supplier: Vendor B, SOW Event ID: CNRPE0000083, SOW Event Name: Payment]	2016-02-02 16:25
Notification	Rooney, Sarah	The Statement of Work has been accepted on your behalf [SOW ID: CNRTQ00000290]	2016-01-20 15:28
Notification	PCO Kapica Jim	New Statement of Work submitted [SOW ID: CNRTQ00000138, Statement of Work: Manistique 18]	2016-01-18 16:52
Notification	Rooney, Sarah	The Statement of Work has been accepted on your behalf [SOW ID: CNRTQ00000261]	2016-01-18 14:20
Notification	Rooney, Sarah	The Statement of Work has been accepted on your behalf [SOW ID: CNRTQ00000193]	2016-01-18 13:50
Notification	Latreille, Denis	SOW Revision submitted [SOW ID: CNRTQ00000256 (Rev. 1), Statement of Work: South Marshfie]	2016-01-18 10:48
Notification	Rooney, Sarah	The Statement of Work has been accepted on your behalf [SOW ID: CNRTQ00000256]	2016-01-18 10:37
Notification	Agent, Fieldglass	SOW Invoice submitted [Supplier: Vendor B, Invoice Code: CNRPI00000079]	2016-01-08 11:20
Notification	Latreille, Denis	Event completely approved [Supplier: Vendor B, SOW Event ID: CNRPE00000092, SOW Event Name:]	2016-01-08 11:20
Notification	Rooney, Sarah	The Statement of Work has been accepted on your behalf [SOW ID: CNRTQ00000157]	2016-01-08 09:57

2. At any time, you can filter the messages displayed in your message center by changing the preferences on the left side of the page (Notifications, Alerts, Broadcasts, etc.).

- **Subject.** Enter a word or phrase that appears in the Subject of the messages you want to view to filter the list.
- **Message Type.** Select the check box(es) for the message types you want to view. These types include Alerts, Notifications, and Starred. To view all message types, click **Select All**. To hide all messages, except for Alerts, from your Message Center list, click **Select None**.

Note: Because Alerts may be time sensitive, you cannot remove Alert messages from the Message Center.

- **Message Status.** Select the **Unread** check box to display messages you have not read. Select the **Read** check box to display messages you have read.

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3. Click **Filter Messages** to apply the settings based on your previous selections.
4. Click the column headers to further sort the messages by **Type**, **Sender (From)**, **Subject** and **Date Received**.
5. To delete a message from your Message Center, select the check box next to the message in the Message Center list and click **Remove Selected**. The message is permanently removed from your Message Center.
6. To view a message, click the message in the Message Center list.
- a. If a message includes a link that takes you to the associated document (a **Go to Source**), you can click the link to display the source of the message.
7. When you finished viewing a message, you can:
 - b. Click **Remove Message** to remove the message from your Message Center.
 - c. Click **Next** to view the next message in the Message Center list.
 - d. Click **Back to Messages** to return to the Message Center list.

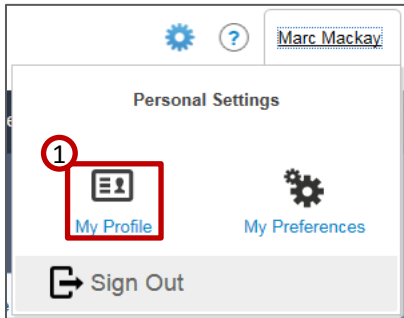
The screenshot displays the Fieldglass Message Center interface. At the top left, there is a button labeled "Back to Messages" with a left-pointing arrow, circled in red and labeled 'd'. Below this is the "Message Center" header, which includes a "Next >" button circled in red and labeled 'c', and a "1 of 28" indicator. The main content area shows a message detail view. At the top right of this view is a "Remove Message" button circled in red and labeled 'b'. The message body contains a "Notification" section with the text "Event rejected [Supplier: Vendor B, SOW Event ID: CNRPE00000083, SOW Event Name: Payment of holdback, SOW ID: CNRTQ00000144]" and a "Go to Source" link circled in red and labeled 'a'. Below the notification is a "Details" section with the following information: Supplier: Vendor B, SOW Event ID: CNRPE00000083, SOW Event Name: Payment of holdback, SOW ID: CNRTQ00000144, and Statement of Work: Fixed Scope Template - CAN holdback.

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5. Updating Email and Contact Information

You can change your contact, including your email address at any time. You can also set up a list of email addresses to be included in the "cc:" field of all email notifications sent to you from the Fieldglass application.

To update email and contact information:



1. Click your username in the top right and select **My Profile**.

The **Personal Settings** page opens, with the **My Profile** tab displayed.

2. Click the **Edit** button to the right of where your name is displayed.

The **My Profile** page opens.

3. In **the Email** field, enter the email address where all your email notifications in the Fieldglass application will be sent.

4. If you want all notifications to be sent to other recipients in addition to yourself, please enter their email addresses in the **Cc: Email Addresses** field.

To enter multiple cc: email addresses, separate each address with a comma or semicolon.

Note: You will have to manually remove the emails from the CC; email addresses when you want to stop notifications being sent to them.

5. Click **Update** to save your changes.

Personal Settings

My Profile My Preferences

Marc Mackay Edit

Employee ID (No Value)

Marc.Mackay@cn.ca

Email *

Cc Email Addresses
Values separated by commas or semicolons.

Cancel Update

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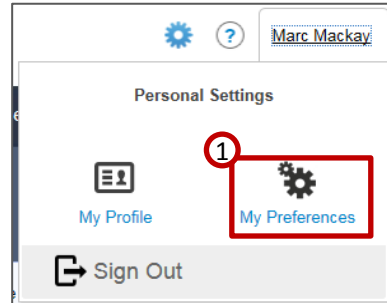
6. Setting and Changing User Profile Preferences

The **My Preferences** tab on the **Personal Settings** page allows you to change or update your contact information and select how you want your notifications, work items, and broadcasts to be routed to you. You can also update your time zone, language defaults, number, date and time formatting.

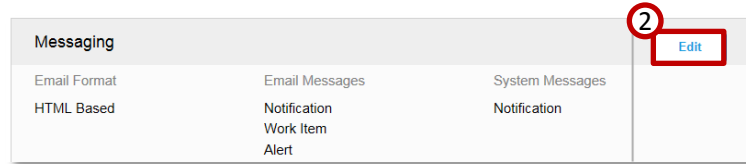
To change your preferences:

1. Click your username in the top right and select **My Preferences**.

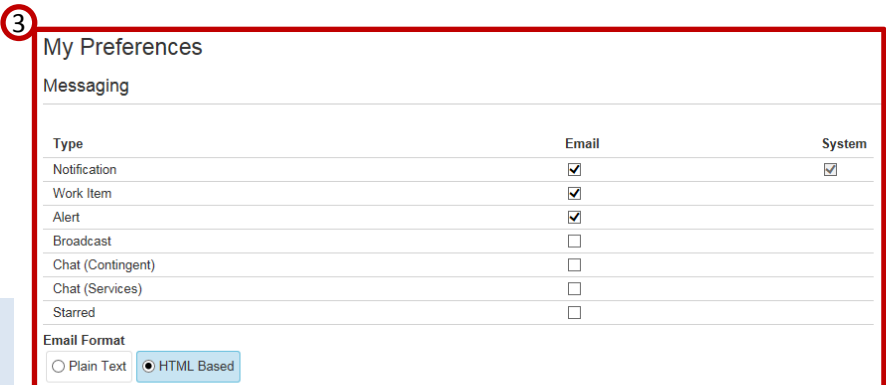
The **Personal Settings** page opens, with the **My Preference** tab displayed.



2. In the **Messaging** section, click **Edit**.



3. On the **My Preferences - Messaging** page, you may indicate whether you want **Notification, Work Item, Alert, Broadcast, Chat, or Starred** messages sent to your email address. Messages generated by the Fieldglass application are always available in the Fieldglass Message Center. However, for each type of item, you can specify if emails should be sent.



4. Click **Update**.



Note: If email notifications are enabled, messages will be marked as **Read** in the Fieldglass message center.

[Cancel](#)

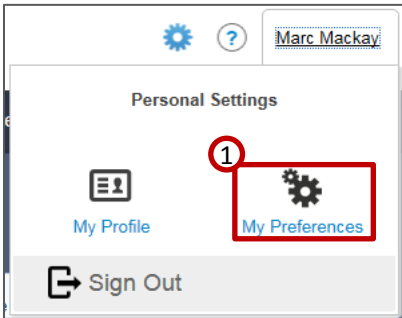
Update

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7. Customizing your Home Page

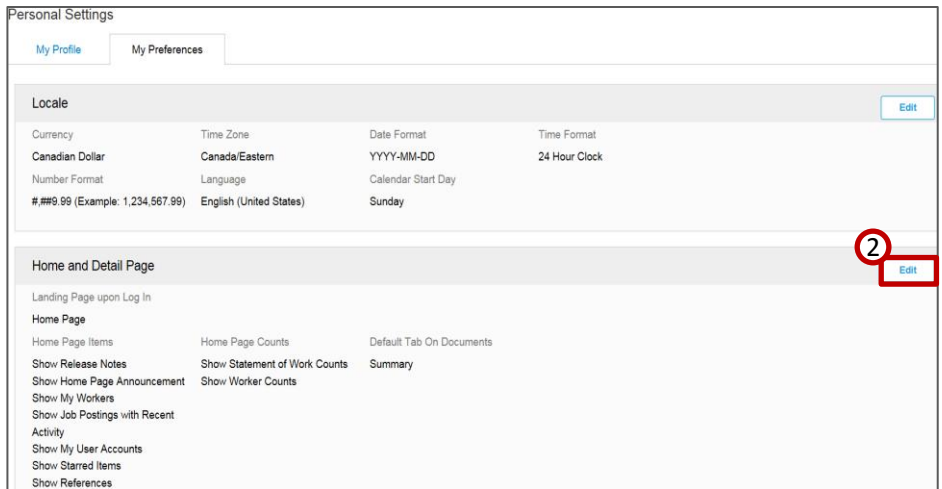
You can customize your home page to display only the items counts and charts you want. This can include Starred Items, Notes, Announcements and Workers.

To customize your home page:



1. Click your username in the top right and select **My Preferences**.

The **Personal Settings** page opens, with the **My Preferences** tab displayed.



2. Click the **Edit** button in the Home and Detail Page section.

The **My Preference** page opens.

My Preferences

Home and Detail Page

Landing Page upon Log In

Home Page

Home Page Items

- Show Release Notes
- Show Home Page Announcement
- Show My Workers
- Show Job Postings with Recent Activity
- Show My User Accounts
- Show Starred Items
- Show References

Home Page Counts

- Show Statement of Work Counts
- Show Worker Counts

Default Tab On Documents

- Details
 Summary

Reports/Charts
(No Value)

[+ Add Reports/Charts](#)

[Cancel](#)

Update

3. In **My Preference** page, check or uncheck the items you want to display or remove from your home page.

4. When you have finished, click **Update** to save your changes.

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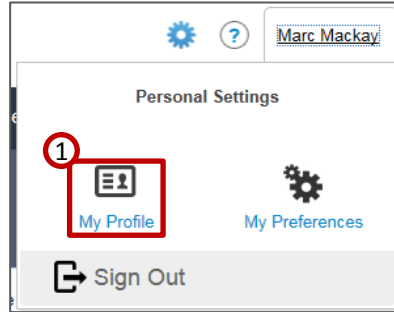
8. Setting Up and Managing your Proxy Account

A proxy account is a great feature you can use to delegate your work items to someone else when you are unavailable.

To Set Up and Manage your Proxy Account:

1. Click your username in the top right and select **My Profile** in the menu that appears.

The **Personal Settings** page opens, with the **My Profile** tab displayed.



2. In the **Proxies** section, click **Edit**.

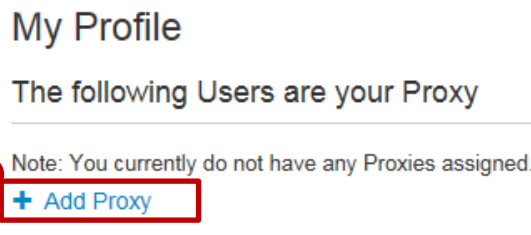
The **My Profile** page is displayed.



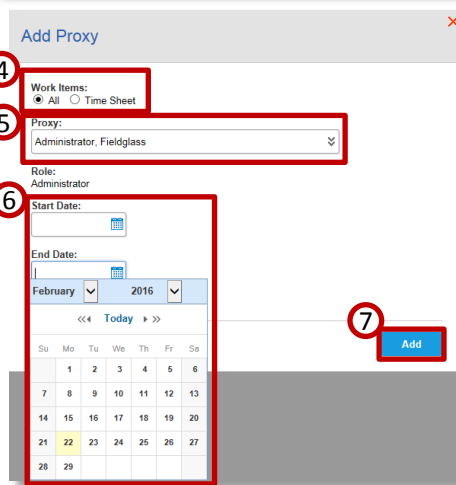
3. To add a new proxy, click **Add Proxy**.

4. Under **Work Items**, select **All** to allow the proxy to act on all your work items.

5. In the **Proxy** list, select the person you want to add as proxy.

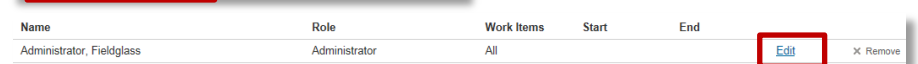


6. Click the calendar icons next to the **Start Date** and **End Date** fields to establish the time period. If you leave the **Start Date** blank, the person selected will become your proxy as soon as you select **Add**. If you leave the **End Date** blank, the person will remain your proxy until you remove him or her.



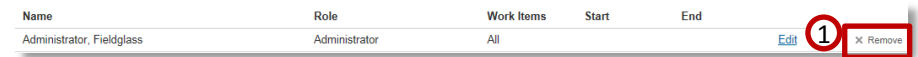
7. Click **Add**.

Note: To change the start date or end date for an existing proxy, click **Edit** next to the proxy you want to update on the **My Profile** page. Make the necessary changes and click **Update**.



To remove your Proxy Account:

1. To remove an existing proxy, click **Remove** next to the proxy on the **My Profile: Proxies & Delegates** page.



2. Click **OK**

