# PROGRAM OVERVIEW

- Transamerica selected SAP **Fieldglass** as their Vendor Management System (VMS). It provides a platform to engage non-employee workers via staffing agency personnel, professional services providers, and manage statement of work engagements.

- **Contingent Worker Module for all Hourly Workers**: helps centralize the complex issues that surround staffing and follows the process below:

  - Job Posting
  - Candidate sourcing and selection
  - Assignment management
  - Time and Expense management
  - Invoicing via Ariba
  - Management reporting
  - Manage hourly SOW workers

- **Fixed Statement of Work Module:** assists with the capturing and defining the workers, deliverables/activities, and timeline for vendors with a fixed statement of work engagement.
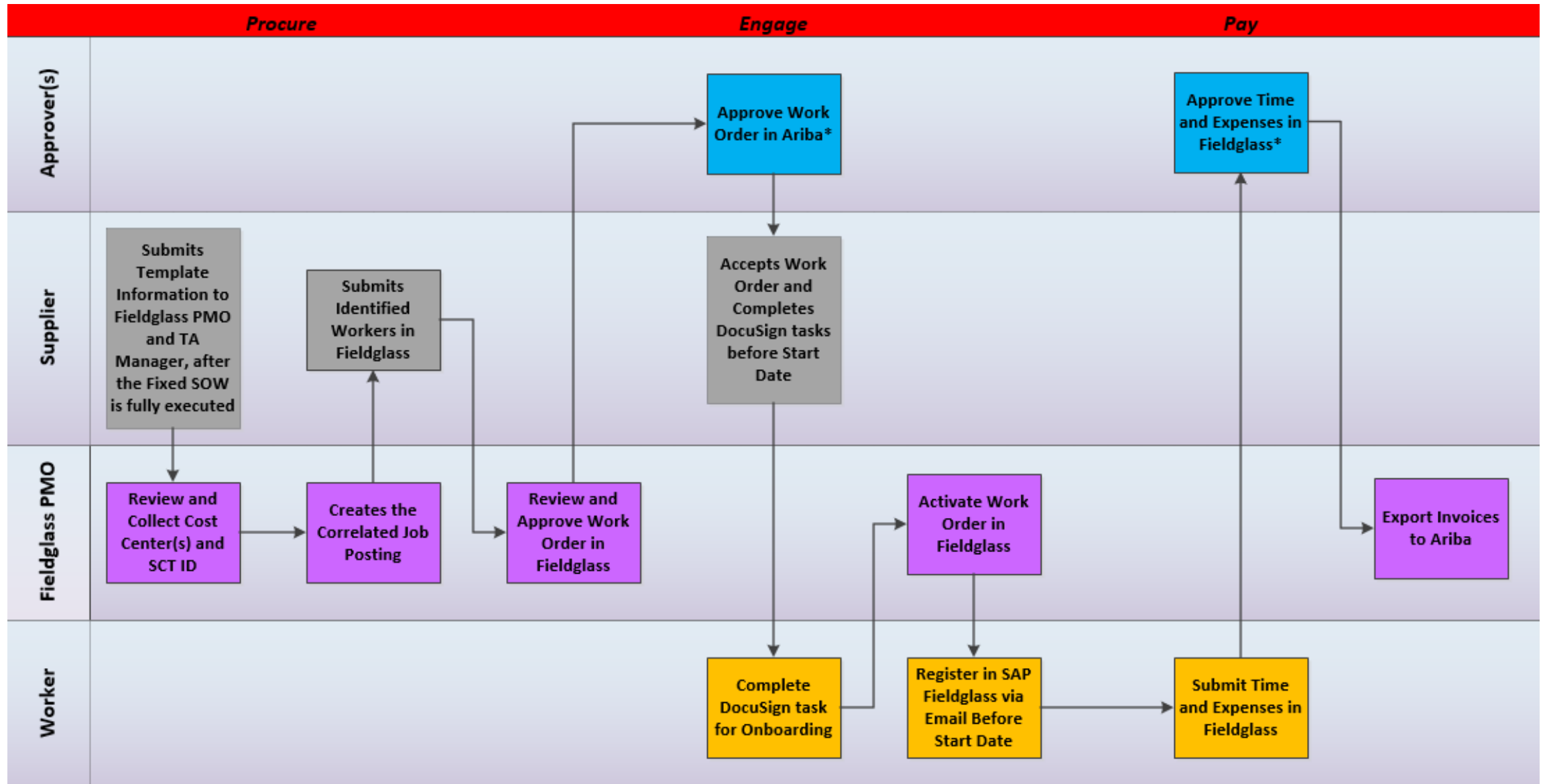
HOURLY WORKERS PROCESS FLOW
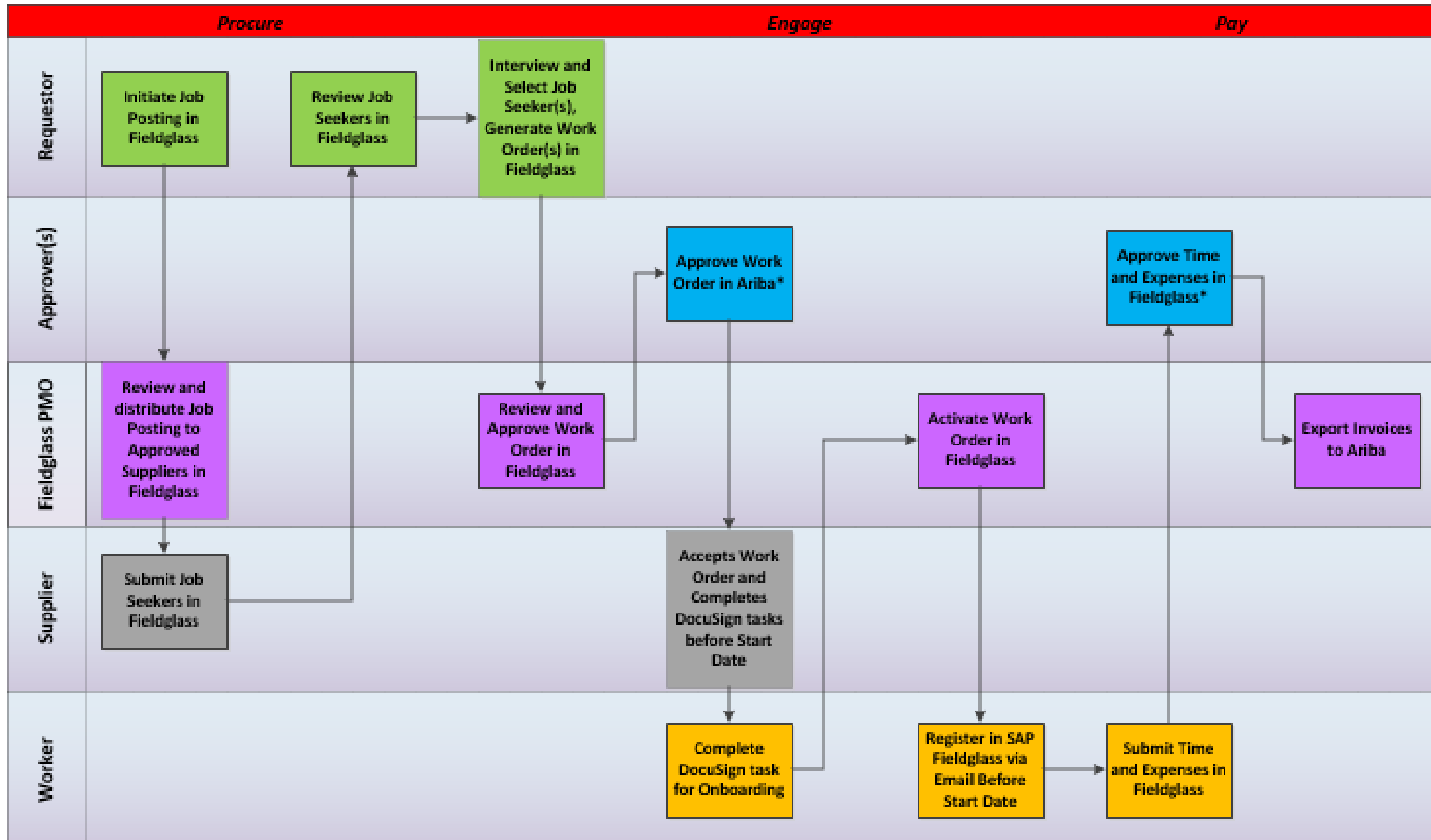
*Approvers include the requestor's manager and the applicable cost center owner(s) based on spend estimate and disbursement authority.

HOURLY WORKERS PROCESS FLOW DETAILS

1. Manager determines a need for new a contingent worker and a job posting is created.

2. Fieldglass Program Management Office (PMO) Team reviews job posting and edit/add comments and released to suppliers.

3. Suppliers review job posting and submit workers / job seekers.

4. Manager reviews job seeker(s) and rejects or interviews candidate(s) and decides who will fill the role.

5. A work order is created in SAP Fieldglass.

6. Work order is being sent to SAP Ariba for financial approvals based on the cost center structure and the spend disbursement authority in SAP Ariba.

7. Once the WO is approved, it routes to the supplier to accept. The supplier would initiate DocuSign to complete onboarding.

8. Fieldglass PMO Team activates the WO and the worker can register as a user in SAP Fieldglass.

9. Fieldglass PMO Team works with suppliers and TA managers to ensure complete onboarding of contingent worker.
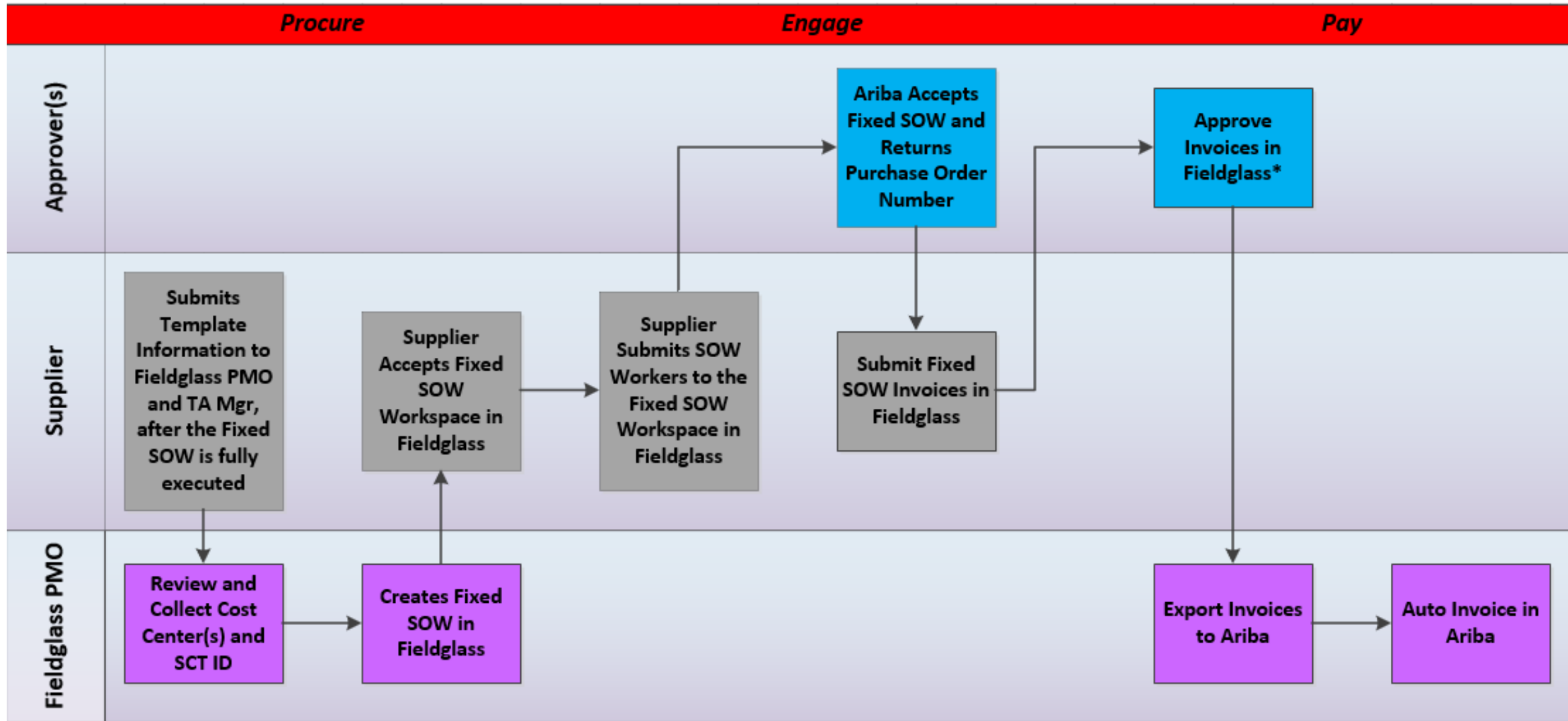
HOURLY SOW WORKERS PROCESS FLOW

*Approvers include the requestor's manager and the applicable cost center owner(s) based on spend estimate and disbursement authority.

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HOURLY SOW WORKERS PROCESS FLOW DETAILS

1. Suppliers submit template information to the Fieldglass PMO Team, Hiring Manager, and VMO (when applicable), after fully executed

2. Fieldglass PMO Team sends email requesting the SOW details adding Cost Center, SCT ID, etc.

3. Suppliers submits identified workers.

4. Fieldglass PMO reviews worker(s) and creates Work Order.

5. Work order (WO) is being sent to SAP Ariba for financial approvals based on the cost center structure and the spend disbursement authority in SAP Ariba.

6. Once the WO is approved, it routes to the supplier to accept. The supplier would initiate DocuSign to complete onboarding.

7. Fieldglass PMO Team activates the WO and the worker can register as a user in SAP Fieldglass and submit time and expenses weekly.

FIXED SOW WORKSPACE PROCESS FLOW

	Procure	Engage	Pay

Approver(s)

- Ariba Accepts Fixed SOW and Returns Purchase Order Number
- Approve Invoices in Fieldglass*

Supplier

- Submits Template Information to Fieldglass PMO and TA Mgr, after the Fixed SOW is fully executed
- Supplier Accepts Fixed SOW Workspace in Fieldglass
- Supplier Submits SOW Workers to the Fixed SOW Workspace in Fieldglass
- Submit Fixed SOW Invoices in Fieldglass

Fieldglass PMO

- Review and Collect Cost Center(s) and SCT ID
- Creates Fixed SOW in Fieldglass
- Export Invoices to Ariba
- Auto Invoice in Ariba

*Approvers include the requestor's manager and the applicable cost center owner(s) based on spend estimate and disbursement authority.

FIXED SOW WORKSPACE PROCESS FLOW DETAILS

1. Suppliers submit template information to the Fieldglass PMO Team, Hiring Manager, and ITVMO (when applicable), after fully executed

2. Fieldglass PMO Team sends email requesting the SOW details adding Cost Center, SCT ID, etc.

3. Fieldglass PMO Team creates SOW in SAP Fieldglass

4. SOW is routed to the Supplier for acceptance

5. Suppliers add/update SOW with workers

6. SOW is routed to SAP Ariba to create the Purchase Order

CONTINGENT WORKFORCE GUIDANCE

- Transamerica's Suppliers play an important role in delivering and reflecting our high-quality brand image.

- We expect each supplier to be 100% compliant with the requirements set forth in our MSA and this will be verified by regular audits.

- We apply our values and the following principles:

  - Business with suppliers is always conducted with mutual respect and professional ethics. We aim to create high performance innovative solutions and customer value.

  - We believe in being a good customer, treating our suppliers fairly and equally and building a bond of trust and respect.

  - We select suppliers based upon rational and clear standards: quality, cost, delivery time, innovation, sustainability, continuous improvements and shared values for profitable growth.

  - We build and maintain strong and beneficial long-term relationships based on mutual trust.

PROGRAM RULES

- All activity must be captured in SAP Fieldglass: all Job Postings, candidates' submittals, interviews, work orders, workers, etc.

- All items are approved in SAP Fieldglass and/or SAP Ariba based on the internal process of Transamerica.

- Candidates may not be submitted directly to a manager – all candidates must be submitted via SAP Fieldglass.

- Workers may not start an assignment until a background check (based on MSA) is fully completed and DocuSign (Hourly Workers) has been completed. There are no exceptions to this requirement.

TRANSAMERICA EXPECTATIONS FOR SUPPLIERS

- Suppliers are responsible for their workers' management in the tool – workers expiring, spend exceeded, unapproved Time Sheets, terminations, and more.
  - **Note:** Fieldglass PMO Team must be notified of any changes to the worker status ASAP to ensure data integrity and compliance.
- Suppliers cannot solicit business with the current manager(s) they are conducting with or prospective managers/departments. No unsolicited site visits are permitted.
- Suppliers are responsible for notifying the Fieldglass PMO when a:
  - New executed Fixed SOW is created/occurs
  - Termination of a Fixed SOW
- Supplier is responsible for maintaining accurate records; Adding, updating, and removing workers from Fixed SOW in SAP Fieldglass.
- Suppliers must submit Billing inquiries within **3 months** of the invoice date. All inquiries should be executed as soon as an issue is identified.
- Supplier is responsible for submitting invoices against the terms outlined in the Fixed SOW
- Suppliers should not submit invoices outside of SAP Fieldglass, risk of duplication.

SUPPLIER PERFORMANCE

- Adherence to the process outlined is a key in determining supplier's performance and any supplier who does not conduct business based on the contingent program rules can be banned from the program and from doing business with Transamerica.

- Compliance with the rules will benefit suppliers as this will be a major factor when conducting suppliers' optimization and evaluating expansion opportunities for additional areas the supplier can support in the future.

__Remember – when not sure, please reach out to the Transamerica PMO Team instead of working against the program rules!__

FIELDGLASS DO'S AND DON'T'S

Do	Don't
Inform the PMO anytime a manager reaches out directly to you for a staffing need	Work on the need and send resumes directly to the manager
Submit solid candidates as fast as possible, as the best rates feasible to reqs released	Submit all candidate at the top of the rate card (or exceed) when the level of expertise is not significant
Ask the PMO for clarifications on a req	Ask the manager for clarifications on a req
Respond to reqs in SAP Fieldglass or decline the req	Reach out to managers to solicit business
Schedule interviews via SAP Fieldglass	Schedule interviews directly with the managers
Confirm once a candidate accepted a WO	Ignore WO in SAP Fieldglass and not inform the PMO and/or the manager of status
Monitor workers in SAP Fieldglass; manage worker registration, end dates, bill rates, missing T/S, expenses submittal etc.	Let WO expire, leave WO open weeks or months after the worker left, not have T/S or expenses submitted timely
Discuss Bill rates ranges	Discuss worker pay rates
Inform the PMO and/or manager on background pending	Send the background check results
Complete DocuSign	Leave onboarding items pending

For any questing or concern – please always reach out to the Transamerica PMO Team

FREQUENTLY ASKED QUESTIONS (FAQ)

- **It is stated in the supplier amendment we executed that you will be deducting the supplier VMS fee?**
  - Hourly workers: The VMS fee of **0.6%** will be deducted from each timesheet. No fee will be deducted from expenses. For example, if the invoice is $100; $99.4 will be paid to you and $0.6 will be paid to SAP Fieldglass.
  - Fixed SOW: **0.3%** will be deducted automatically from the invoice before being paid to the supplier.

- **What is the frequency of submitting and approving time sheet and expenses for hourly workers?**
  Workers are asked to submit their time weekly at the end of the week. Even if they did not work, it's best to submit "0" hours for the week and not leave the T/S in "draft" status. Managers (or proxy users) are asked to approve timesheets by EOD Monday.

- **Are rates the same for transitioning workers?**
  Yes. No changes will happen to the total bill rate once transitioned to SAP Fieldglass.

- **Are Expenses are built into the tool?**
  Yes – there is a drop-down box where the worker can select expense type (i.e air, hotel, etc.) and upload receipts as well.

- **Is the use of MSPS/PPM still needed?**
  Yes – MSPS/PPM is used for allocation and project planning only – this system is not used for payment or for hours tracking. This is to track workers' utilization only and this will remain as-is. SAP Fieldglass T/S is meant to replace the supplier's T/S system , as you have full visibility into it, can extract the info and make changes when needed. Most suppliers do not utilize their own system once they move to SAP Fieldglass.

- **How will we handle Conversions?**
  Based on the terms for conversion in our MSA, workers can be converted and if a conversion fee is needed, this will be submitted as a Miscellaneous Invoice in SAP Fieldglass with the correct calculation for the amount. Please send us your conversation terms to add to file.

ADDITIONAL FIELDGLASS TRAINING AND RESOURCES

- The link to SAP Fieldglass (https://www.fieldglass.net)

- You can access the training materials via the help menu (question mark) in SAP Fieldglass once you log in. There is also a link available at Fieldglass.com specifically for training resources and webinars:
  See https://www.fieldglass.com/education/training/english
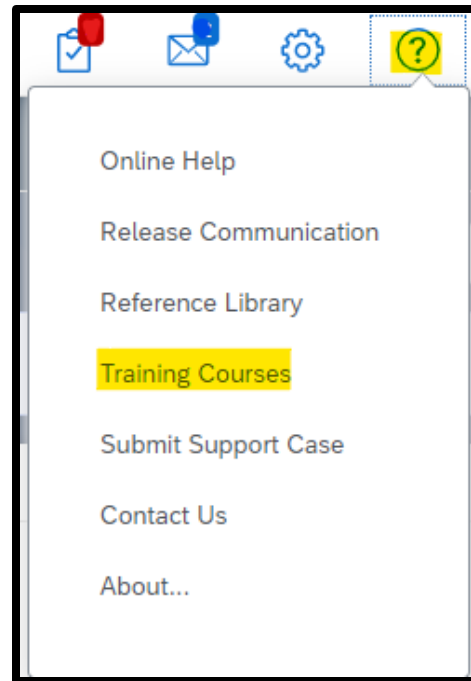
FIELDGLASS PMO TEAM

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THANK YOU!

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