



PUBLIC SECTOR RESOURCING

# Fieldglass Hiring Manager Guide

June 2018  
V1.5

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# Purpose

- This guide has been created to assist Hiring Managers in using the Fieldglass System
- You will find step by step instructions within this document to guide you
- Process flows are included to show each teams responsibility within the process chain at different stages. Teams include;
  - Hiring Managers / Interviewers
  - Approvers (Driven from the CA matrix of Approvers)
  - PSR Delivery & Delivery Admin
  - PSR Recruiter
  - PSR Sourcing
- This document will be reviewed periodically for any changes and updated accordingly

# Fieldglass FAQ's

## Locations

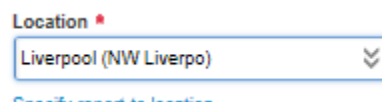
The location structure in PSR1 is built around a three tier hierarchy. These are not linked to departments specifically as use FG native location functionality and with the number of both business units and locations and the fact many are shared it was not practical to try and link this.

**Level 1 – Region** – This is based on the set government regions and is used for reporting and supplier distribution and is not linked to Level 2 or 3



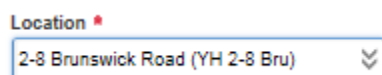
A screenshot of a dropdown menu labeled 'Region' with a red asterisk. The selected option is 'Inner London'. The dropdown arrow is visible on the right side.

**Level 2 – Location = City or Office Site** – The vast majority of level 2's are Cities/Towns across the UK. These will have a code next to them to show the region they are linked to for reporting (NW = North West). Once a city is selected, if there are sites relating to that city they will be selectable in the next field.



A screenshot of a dropdown menu labeled 'Location' with a red asterisk. The selected option is 'Liverpool (NW Liverpo)'. The dropdown arrow is visible on the right side.

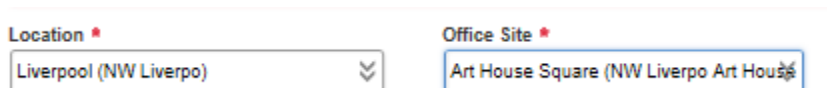
Some Level 2's are Office Sites and this is where the date provided did not show a City and we could not find it out. If a site is the site field will disappear



A screenshot of a dropdown menu labeled 'Location' with a red asterisk. The selected option is '2-8 Brunswick Road (YH 2-8 Bru)'. The dropdown arrow is visible on the right side.

**Level 3 – Office Site = Office Location or Town** - This box will stay visible if a City is selected with sites associated to it. It will show all the office or government sites in that area that have been provided to PSR.

You can select an office:



A screenshot showing two dropdown menus side-by-side. The first is labeled 'Location' with a red asterisk and has 'Liverpool (NW Liverpo)' selected. The second is labeled 'Office Site' with a red asterisk and has 'Art House Square (NW Liverpo Art House)' selected.

Or possibly a town linked to the City



A screenshot showing two dropdown menus side-by-side. The first is labeled 'Location' with a red asterisk and has 'Liverpool (NW Liverpo)' selected. The second is labeled 'Office Site' with a red asterisk and has 'Birkenhead (NW Liverpo Birkenhead)' selected.

## Searching Locations

The location box can be searched using the drop down pick list or by typing part of the location into the field directly. Once selected the Office Site box automatically updates to reflect the Office Sites associated to the Location and can also be searched using the drop down or by typing part of the name. It does not need to be the first part of the address.

The image shows two examples of the 'Office Site' search interface. On the left, a search box contains the text 'Bir' and a dropdown menu shows 'Birkenhead (NW Liverpo Birkenhead)'. On the right, a search box contains the text 'house' and a dropdown menu shows three results: '2nd Floor, Walker House (NW Liverpo 2nd Floor, Walker H...', 'Art House Square (NW Liverpo Art House Square)', and 'Bevan House (NW Liverpo Bevan House)'.

**Missing Sites** – If you are unable to find the address you require please try typing in all parts of it (street, building name, post code). If it still does not appear please notify the helpdesk of the name of the site, the city it is linked to and the region and they will check and update if necessary.

## Approvers

The approver user group no longer exists in PSR. A Hiring Manager User Type is capable of approving and therefore all users who were Procurement, HR, Finance approver will see their User Type as Hiring Manager in the PSR Instance of Fieldglass. This is purely a user type association and does not mean they have to hire staff, but it allows us to maintain a more efficient User Type structure.

A Hiring Manager can be associated to multiple Business Units and Cost Codes and can then approve for any of these if added as an ad hoc approver.

PSR will be validating approval routing using a matrix of authorised approver that should have been provided.

**Adding New Approvers to FG** – A Hiring Manager can be added by making a request to the helpdesk and furnishing them with the name, email address, the business units they need to approve for and the cost centres.

PSR will not accept approval from these hiring managers however, unless they have been formally added to the approval matrix by the authorised person in the department.

## Cost Centres

Cost Centres are associated to departments based on data provided before go live and from the old incumbent suppliers. These are associated to the relevant User as well as the department.

On creation of a requirement you will be asked to add a cost centre. It can be added by looking in the drop down which will show the Users last 6 cost centre selections

### Cost Allocation

[Select Cost Centre]  
3001388  
3003175  
5541  
800131454  
NCA ECC  
DFT DVLA

[+ Add or remove Cost Centres](#)

If your department does not use Cost Centres you will still need to add a code which will generally be the only cost centre visible and a shortened code for your area

### Cost Allocation

**Please only select one Cost Centre**

Cost Centre \*

DFT DVLA

[+ Add or remove Cost Centres](#)

If you are unable to find your cost centre in the pick list then you click the [+ Add or remove Cost Centres](#) And it will open up a search box.

**Add or Remove Cost Centres**

Cost Centres:  Used  Unused [Filter](#)

Search Cost Centres Items Found: 581

<input type="checkbox"/> Name	Code
<input type="text" value="Enter Criteria"/>	<input type="text" value="Enter Criteria"/>
<input type="checkbox"/> 000000	000000
<input type="checkbox"/> 011050ADMIN51140101	011050ADMIN51140101
<input type="checkbox"/> 011053ADMIN51140101	011053ADMIN51140101
<input type="checkbox"/> 011068ADMIN52220101	011068ADMIN52220101DCMS
<input type="checkbox"/> 011073ADMIN51140102	011073ADMIN51140102DCMS

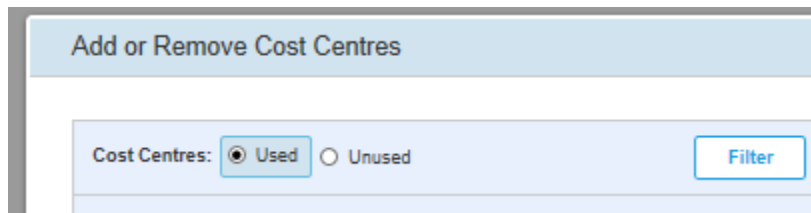
[Add Selected](#)

**Selected Cost Centres**

<input type="checkbox"/> Name	Code
<input checked="" type="checkbox"/> DFT DVLA	DFT DVLA

[Cancel](#) [Update](#)

This has two sections:



Used – where you can scroll or type and search for any previously used Cost Centres

Unused – Where you can scroll or type and search for any previously unused cost centres.

Is it always worth checking unused if you can't find the cost centre you are looking for.



This will add the cost centre to the requirement.

You can only select one at this stage, a primary cost centre, but can split the cost across multiple cost centres at Work order stage.

**Missing Cost Centres** – If you are unable to find the cost centre you need please contact the helpdesk, via your authorised data owner within your department, with the name of the cost centre, the business unit it needs to be associated to and all the Users who may need to select it.

## Req Approvals

Some queries have been raised regarding the approval process for requirements. The below statement intends to clarify what a requirement owner can expect from the approval process.

Once a user has uploaded a requirement to Fieldglass and added the required ad-hoc approvers, it will then flow through a sequence of activities:

- PSR Triage – completed by a PSR Recruiter
- PSR Verification – completed by a PSR Recruiter
- Return to the Requirement Owner
- Ad-hoc approval – completed by a CA representative

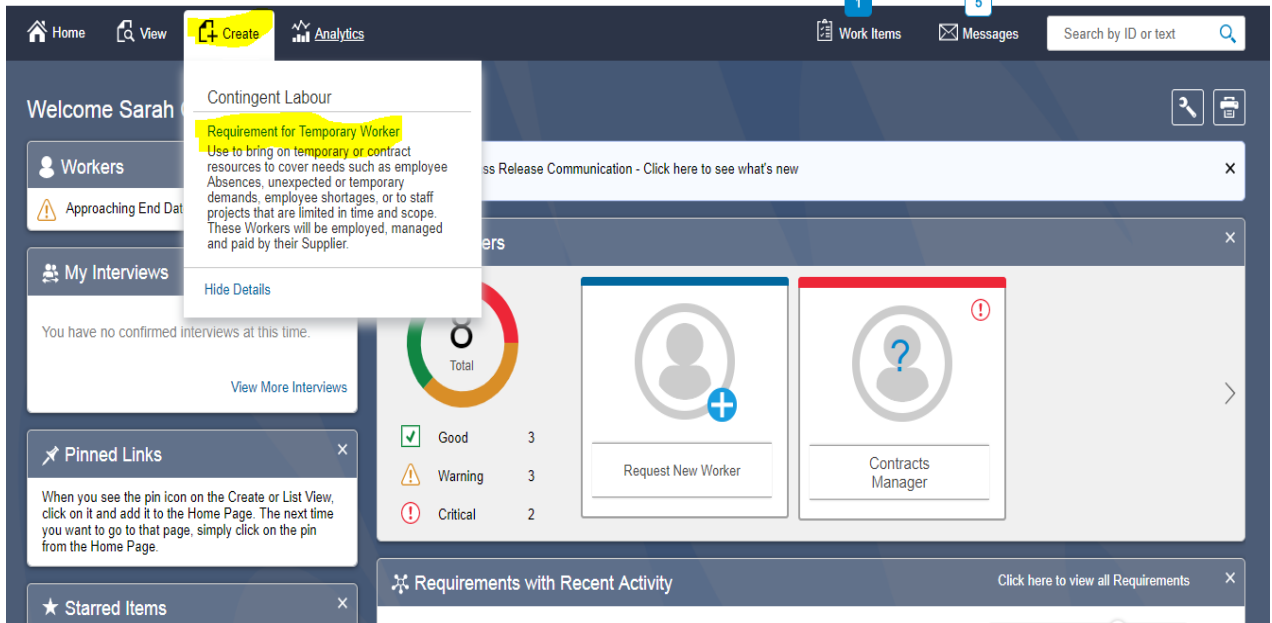
Once approved the requirement will be fulfilled by the PSR recruitment team as part of the talent sourcing process.



# Fieldglass System Instructions

## Raising a Requirement

- Select Create a requirement for a temporary worker.



- Select the job from the available list
- For hourly rate templates, see 'Appendix'

Creating a requirement can be accomplished by either selecting a requirement template or a requirement. The Cards view displays starred and recently used sources for easy access and provides advanced search capabilities. The List View provides a full list of available sources.

View  Requirement Templates  Requirements

Items Found: 100+ Rows: 10



Title	Category	ST Bill Rate	Description
<input type="text" value="Enter Criteria"/>	<input type="text" value="All"/>	<input type="text" value="Enter Criteria"/>	<input type="text" value="Enter Criteria"/>
<a href="#">(ICS) Integrated Childrens Syst</a>	Niche	1.27 - 1,083.86 /Day	<input type="button" value="i"/>
<a href="#">.NET/SQL Developer</a>	Information and Comr	1.27 - 594.40 /Day	<input type="button" value="i"/>
<a href="#">ABAP Developer</a>	Information and Comr	1.27 - 776.99 /Day	<input type="button" value="i"/>
<a href="#">Account Manager</a>	Information and Comr	1.27 - 697.22 /Day	<input type="button" value="i"/>
<a href="#">Accountant</a>	Finance; Audit _ Acco	1.27 - 461.43 /Day	<input type="button" value="i"/>
<a href="#">Accreditor Assessor</a>	Niche	1.27 - 944.41 /Day	<input type="button" value="i"/>
<a href="#">Acquisition Safety Support Offi</a>	Estates _ Logistics	1.27 - 253.53 /Day	<input type="button" value="i"/>
<a href="#">Actuary</a>	Finance; Audit _ Acco	1.27 - 1,622.62 /Day	<input type="button" value="i"/>
<a href="#">Aeronautical Engineer</a>	Engineering	1.27 - 661.01 /Day	<input type="button" value="i"/>
<a href="#">Aeronautical Structural Engines</a>	Engineering	1.27 - 443.68 /Day	<input type="button" value="i"/>

1 of 10

- Choose a start and end date for the position or Enter job duration

Details

---

**Start Date \***   **End Date \***   or **Enter job duration**

**Number of Positions \***

**Title**  
ABAP Developer

**Description (optional)**

(characters remaining: 10000)


**Is travel required for position? \***  
 Yes  No

- Job title is driven from the Requirement template and is not editable.
- You can choose to add more role details and a description.

**Is travel required for position? \***

Yes  No

**Customer Entity \***

Department for Communities and Local Government (DCLG) 

**Location \***



**Office Site \***




[Specify report-to location](#)

**Business Unit \***

Department for Communities and Local Government (DCLG) 

[Select via tree](#)

**Client Reference Number (optional)** 

**Do you wish to review this requirement before the selected approval chain receive it \*** 





**Region \***



- Select if travel is required and input percentage of estimated time required to travel
- Ensure Customer Entity is correct

- Select Location for the main location of the role
- Business Unit will default to your 'Primary Business Unit'. Ensure this is correct
- Enter Client Reference Number, internally known as Position number – this is only visible to the Client, i.e. Hiring Manager and PSR Delivery team
- Choose if you want to review the requirement before it is submitted for final approval. For 'High Touch' roles, it will always be routed to the Hiring Manager for review and approval
  - High Touch Service – Hiring Manager has minimal interaction with the use of Fieldglass and PSR Recruiter raises the requisition on their behalf
  - Medium Touch (the process has been built around this as standard) – This service is a mix of the Hiring Manager and Recruiter both interacting with Fieldglass
- Choose the Region from the drop-down list

Requisition Type \* 

Name of Nominated Worker (optional) 

Please provide any additional information specific to this role (optional)

(characters remaining: 4000)

Are there any Health and Safety requirements or hazards associated to this role? \*

If yes, please specify the Health and Safety Considerations (optional)

Is the role in or out of scope of IR35? \*

Level of screening \*

Grade \*

- Select Requisition Type from the drop-down list.
  1. New Requirement
  2. Nominated
  3. Replacement
  4. Transition
- If it is a pre-identified Worker, you would choose 'Nominated' which is the Fieldglass equivalent selection
- Select if there are any Health & Safety regulations associated
  - You will be required to specify what, if any, these are
- Select if role is in or out of scope of IR35 Legislation. If you are unsure, you will be required to complete an IR35 assessment via the HRMC website:  
<https://www.gov.uk/guidance/check-employment-status-for-tax>
  - Alternatively, contact the PSR Helpdesk [helpdesk@publicsectorresourcing.co.uk](mailto:helpdesk@publicsectorresourcing.co.uk)

- if 'out of scope', you will be required to upload the assessment form to the requirement (attachments available to add at the end of the initial Requirement creation, instructions below)
- Select level of screening required
- Input the role Grade. If you use Spine Points, please also add the Spine Point along with the Grade.

---

Cost Allocation

 Please only select one Cost Centre

Cost Centre \*  
[Select Cost Centre] ▼

[+ Add or remove Cost Centres](#)

---

Attachments

No Attachments Defined

[+ Add Attachments](#)

[Cancel](#)

[Complete Later](#)

[Submit](#)

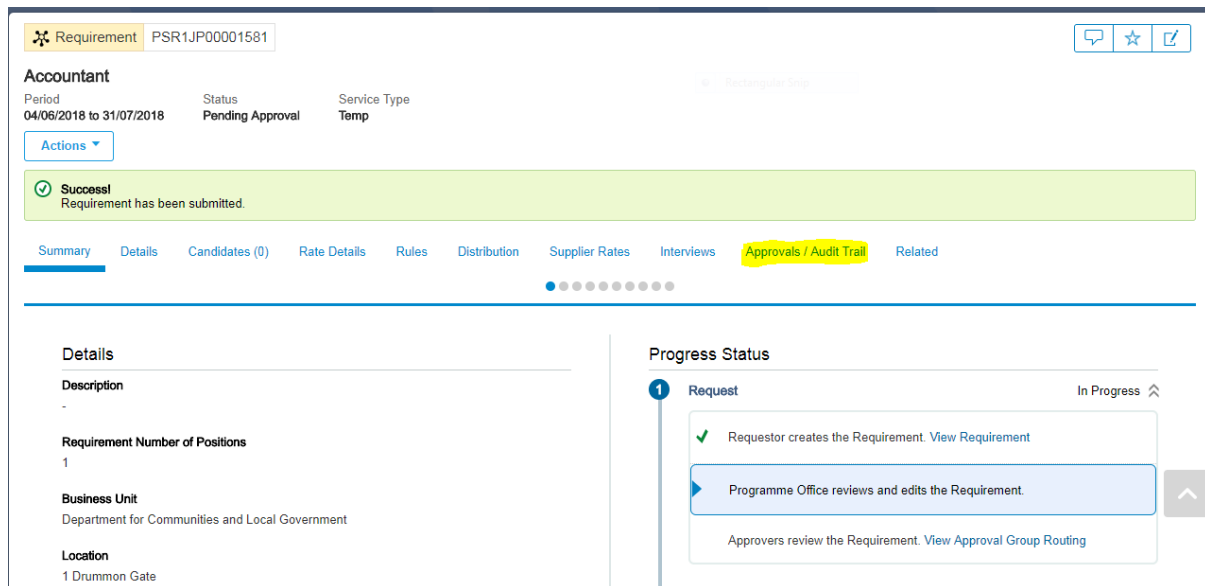
- Select the correct Cost Centre
- Add any relevant attachments, i.e. Approval chain (if audit trail outside of Fieldglass), CA specific forms (if any) and if applicable, the HMRC IR35 assessment, PDF form if the role is out of scope of this legislation.
- Click Submit. This will then be routed to AMS PSR Recruitment Teams for further approval

*Next Page>>*

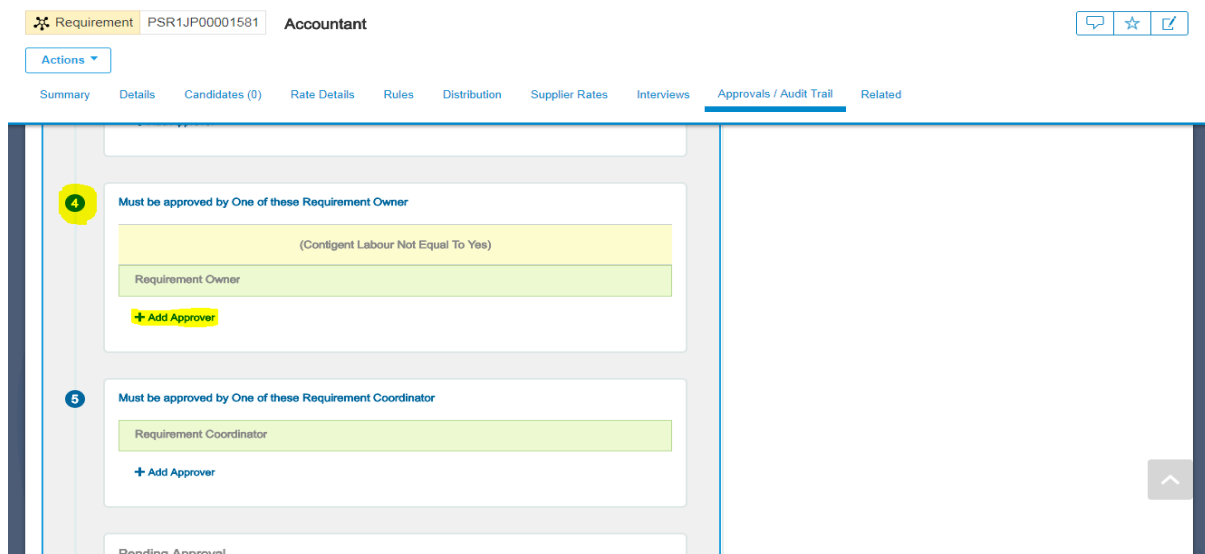
## Adding Ad-Hoc Approvers and Approving Requirements

*Ad-hoc approvers will be chosen using the CA matrix of approvers and these will be validated before approval by the PSR Delivery Team*

- After you raise a requirement, it is at this point you can add ad-hoc approvers



- Click on Approvals / Audit trail as highlighted above and scroll to the option that says level 4 'Requirement Owner' as per below screenshot and select 'Add approver'



- Requirement Approval chain is set-up as follows;

1. Level 1 Approval required by an 'MSP user' – AMS PSR team OR Brook Street team
2. Level 2 Approval required by an 'MSP user' – AMS PSR team OR Brook Street team

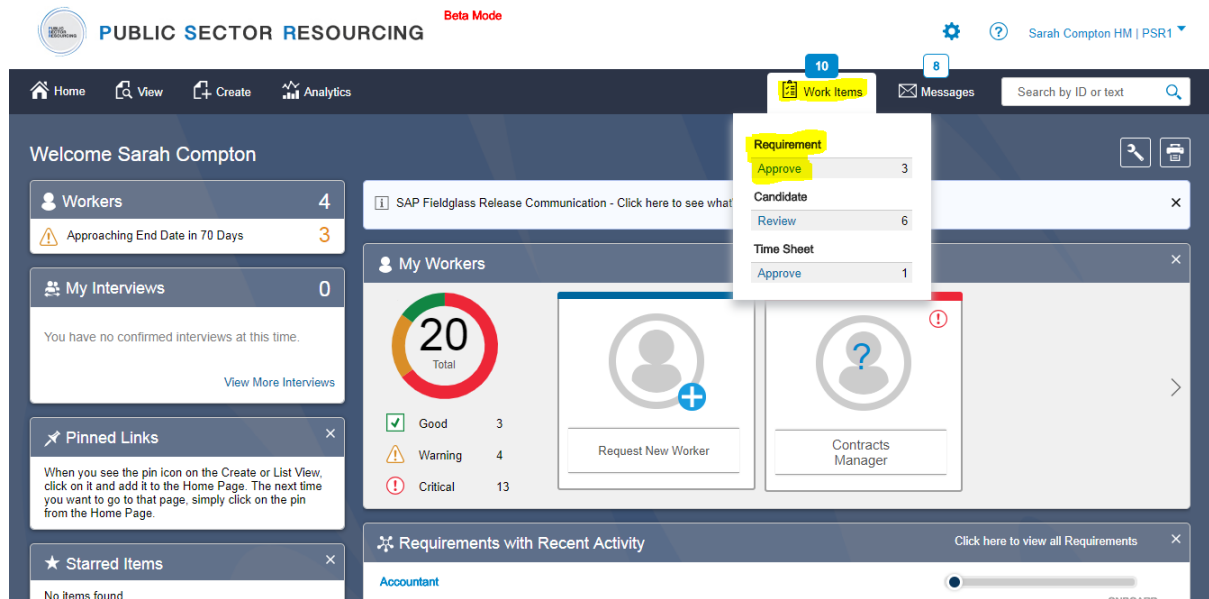
3. Level 3 Approval required by a 'Requirement Owner' – Hiring Manager

4. Level 4 Approval required by a 'Requirement Owner' – Ad-hoc CA approver

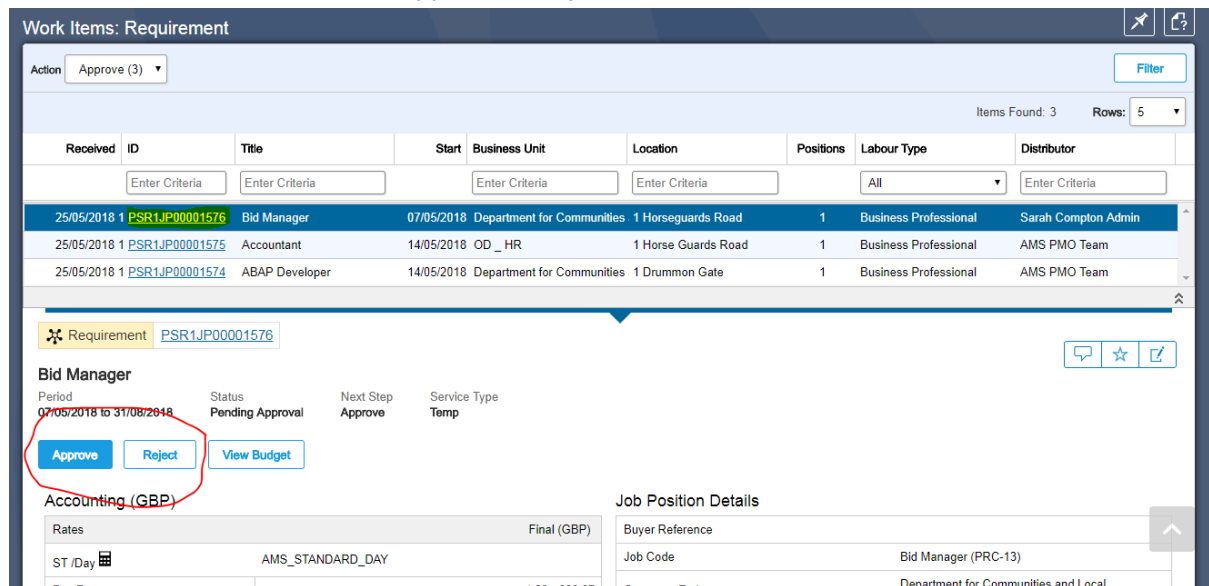
### Approving a Requirement

This is applicable for 'High Touch Service' roles -where the Recruiters raises the requirement and the Hiring Manager approves the detail

- In the 'High Touch' service process, the requirement is raised by the AMS PSR Recruitment team and will be then routed to the Hiring Manager for review and approval
- You will receive a Work Item for this as shown below



- Select the ID of the requirement you wish to review the detail of as highlighted below and if satisfied with the detail, Approve or Reject



- If Rejecting, select a reason from drop down list

The screenshot displays a software interface for managing requirements. A modal dialog box titled "Reject Requirement" is open in the center. The dialog contains a "Reason" dropdown menu with the text "<Select a Reason>", a "Comments (optional)" text area with a character count of "(characters remaining: 1000)", and two buttons: "Cancel" and "Reject".

The background interface shows a table of requirements with columns for "Received", "ID", and "Title". The selected requirement is "Bid Manager" with ID "PSR1JP00001576". Below the table, there are sections for "Bid Manager" details (Period: 07/05/2018 to 31/08/2018, Status: Pending Approval) and "Accounting (GBP)" details (Pay Rate: 1.00 - 666.67). The "Job Position Details" section shows Buyer Reference, Job Code (Bid Manager (PRC-13)), and Customer Entity (Department for Communities and Local Government (DCLG)).

- If approving, it will be directed back to the AMS PSR Recruiter to continue managing the Requirement

## Reviewing CV's

- Shortlisted CV's will be available to view in Work Items

The screenshot shows the 'PUBLIC SECTOR RESOURCING' dashboard in 'Beta Mode'. The user is Sarah Compton HM | PSR1. The dashboard includes a navigation bar with Home, View, Create, and Analytics. A 'Welcome Sarah Compton' message is displayed. Key metrics include 4 Workers, 2 Approaching End Date in 70 Days, and 0 My Interviews. The 'My Workers' section shows a total of 43 workers, with 22 Good, 0 Warning, and 21 Critical. A dropdown menu is open over the 'My Workers' section, listing various actions: Requirement Approve (4), Candidate Review (2), Work Order Approve (1), Time Sheet Approve (1), and Expense Sheet Approve (2). Below the dashboard, there is a 'Requirements with Recent Activity' section.

- If you have multiple candidates at 'Review stage' (candidates who have been Shortlisted by the PSR Recruitment team and awaiting next steps in the process) you will see their names here. Click on the ID of the candidate you want to review more details of OR at this point in the process, 2 applicable options would be to an Schedule Interview, or Reject if unsuitable

The screenshot shows the 'Work Items: Candidate' view. The 'Action' is set to 'Review (2)'. The table below shows 2 items found. The candidate 'Styles1, Harry' is selected, and his details are shown below the table. The details include: Available Date 14/05/2018, Status Shortlisted, Next Step Choose Action, Requirement Aeronautical Engineer PSR1JP00001555, and Supplier Name Withheld. Action buttons include Select for Hire, Unshortlist, Schedule Interview, Mark as Interviewed, and Reject.

Received	ID	Name	Location	Requirement ID	Supplier	Submitted
25/05/2018 1	XXXXJS0000002	Baker, Tracey	1 Horse Guards	PSR1JP0000157	Name Withheld	25/05/2018
22/05/2018 1	XXXXJS0000002	Styles1, Harry	1 Drummon Gate	PSR1JP0000155	Name Withheld	22/05/2018

**Styles1, Harry**  
 Available Date: 14/05/2018  
 Status: Shortlisted  
 Next Step: Choose Action  
 Requirement: Aeronautical Engineer PSR1JP00001555  
 Supplier: Name Withheld

Buttons: Select for Hire, Unshortlist, Schedule Interview, Mark as Interviewed, Reject

- If rejecting, you will need to select a reason from the drop-down list. If selection is 'other' please direct comments back to Recruiter directly, via phone or email.

*Please note: If completing the free-text comments section under Rejection reason, this will be visible to PSR Delivery team OR the Supplier (if an agency candidate) and candidates can request this information as per new GDPR rules*



- You can review more info on the candidate in the Summary page. It is here you can see at a glance whether they meet the selected criteria as highlighted below

← Go to List: Candidate

Candidate XXXX.JS00000028

**McCartney, Paul**

Available Date: 21/05/2018 | Status: Shortlisted | Next Step: Choose Action | Requirement: .NET/SQL Developer PSR1.JP00001573 | Supplier Name: Withheld

[Hire](#) [More Actions](#)

Summary | Details | Rate Details | Interviews | Rating | Approvals / Audit Trail | Related

Search across this Page

**Rate above Requirement average rate of 594.40 GBP**

**Details**

**Cost Centre List**  
Cost Centre 49

**Resume/CV**  
[CV Test 1.docx](#)

**Cost Score**  
22.08

**Availability Score**  
25.56

CV Test 1

- Above example; candidate is above the requested pay rate and so a warning has appeared. *You may be required to gain additional approval if your initial budget was approved outside of Fieldglass for the agreed candidate rate*
- Below example; candidate 'meets the selected criteria' so this appears green

PUBLIC SECTOR RESOURCING

Sarah Compton HM | PSR1

Home | View | Create | Analytics | Work Items | Messages | Search by ID or text

← Go to List: Candidate

Candidate XXXX.JS00000027

**Bond 1, James**

Available Date: 14/05/2018 | Status: Shortlisted | Next Step: Choose Action | Requirement: .NET/SQL Developer PSR1.JP00001573 | Supplier Name: Withheld

[Hire](#) [More Actions](#)

Summary | Details | Rate Details | Interviews | Rating | Approvals / Audit Trail | Related

Search across this Page

**Meets Requested Criteria**

**Details**

**Cost Centre List**  
Cost Centre 49

**Resume/CV**

DownloadDocument 1 / 1

CV Test 1

- At this point in the process click More actions and choose 'Schedule Interview' or 'Reject'

The screenshot displays a recruitment management interface for a candidate named Baker, Tracey. The candidate ID is XXXXJS00000025. The interface includes a navigation bar with a 'Go to List: Candidate' link and utility icons. The candidate's details are shown, including the available date (14/05/2018), status (Interviewed), next step (Choose Action), requirement (Assistant Finance Manager PSR1JP00001570), and supplier (Name Withheld). A 'Hire' button and a 'More Actions' dropdown menu are visible. The 'More Actions' menu is open, showing options: 'Quick Hire', 'Schedule Interview', 'Reject', and 'Mark as Interviewed'. A 'DownloadDocument' window is open, showing a document titled 'CV Test 3'. The interface also features a search bar and a 'Related' section.

Candidate: XXXXJS00000025

**Baker, Tracey**

Available Date: 14/05/2018 | Status: Interviewed | Next Step: Choose Action | Requirement: Assistant Finance Manager PSR1JP00001570 | Supplier: Name Withheld

**Hire** | **More Actions**

- Quick Hire
- Schedule Interview
- Reject
- Mark as Interviewed

Add Rating | Related

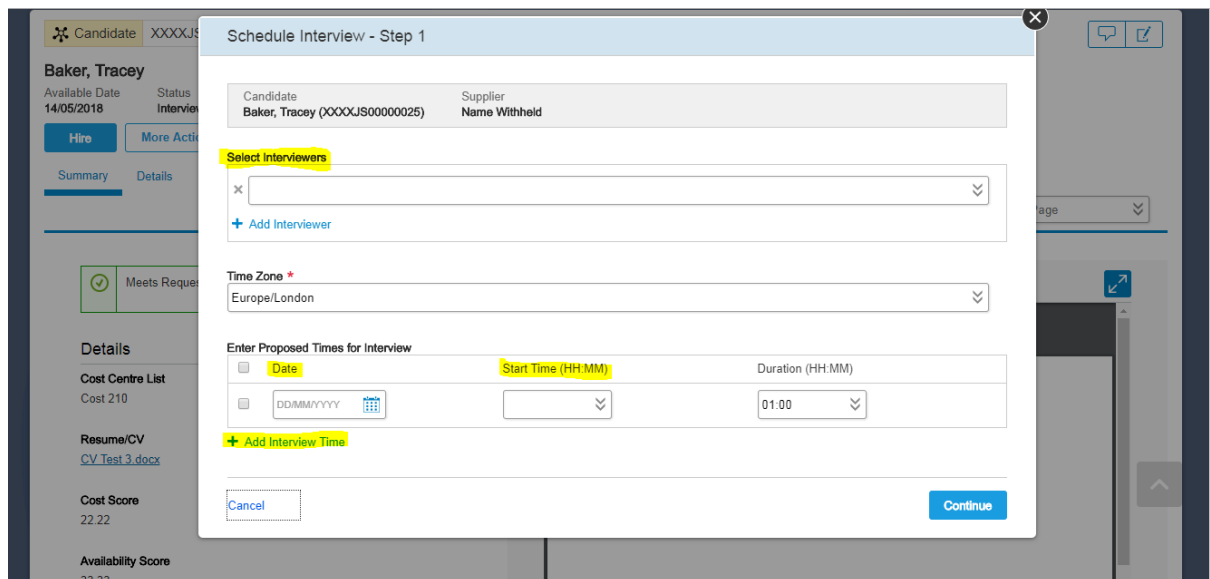
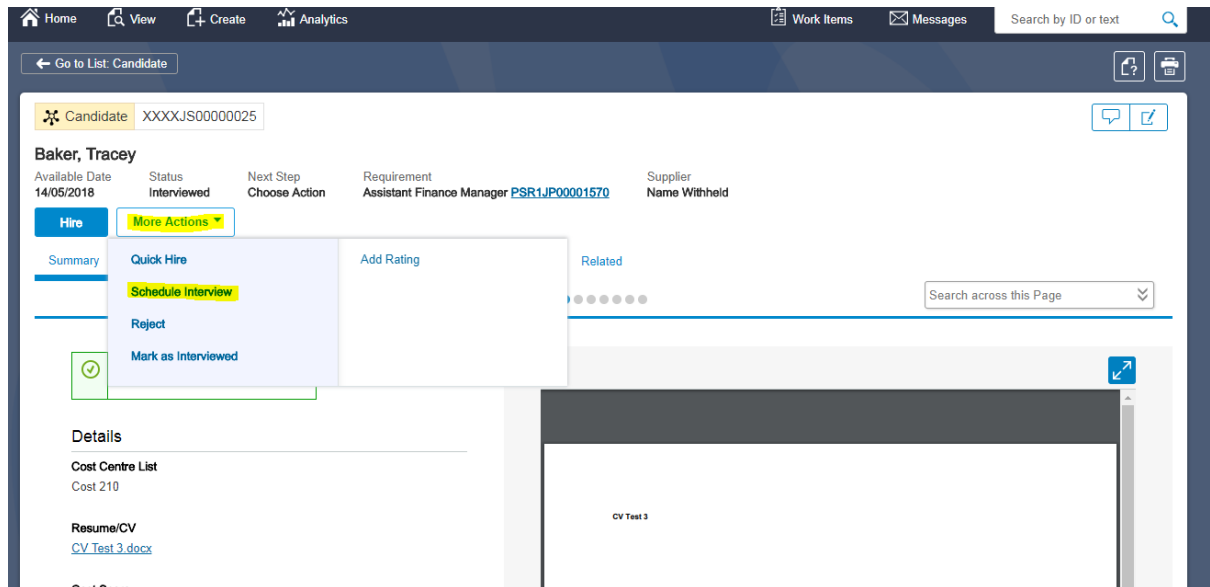
Search across this Page

DownloadDocument 1 / 1

CV Test 3

## Requesting an Interview

- Contact the Recruiter directly, by phone or email to schedule an interview.
- Alternatively, you can choose 'Schedule Interview' if a 'Medium Touch Service' role (as explained above) and input the time / date and details as highlighted in below screenshots



- In the above section, you can choose to add alternative times and dates, so the candidate has options to choose from
- The PSR Recruiter will then organise the interview directly with the candidate or facilitate via the candidate supplier and confirm the interview back to you via the Fieldglass system
- If applicable, they will also send an outlook diary invite to you
- You can review your scheduled and completed interviews in the 'View tab'

The screenshot shows the 'PUBLIC SECTOR RESOURCING' dashboard in 'Beta Mode'. The user is Sarah Compton HM | PSR1. The navigation menu is open, showing options like 'My Items', 'Work Items', 'My Workers', 'Starred', 'Interviews' (highlighted in yellow), 'Annotations', 'My Cost Centres...', 'In Progress...', and 'Recently Viewed...'. A secondary menu is also visible with categories: 'Contingent Labour' (Requirement, Candidate), 'Worker' (Worker, Work Order, Milestone, Time Sheet, Expense Sheet, Absence), and 'Payments' (Invoice, Credit/Debit Memo, Miscellaneous Invoice, Others, Past Data). There are also 'Pinned Links' and 'Starred Items' sections.

- If you filter on Status to select Confirmed Interviews, you can see what interviews have been scheduled and either pending or awaiting your feedback

The screenshot shows the 'Interviews' list view. The period is set from 15/05/2018 to 29/08/2018. The status is filtered to 'Confirmed'. The table below shows the details of the interview records.

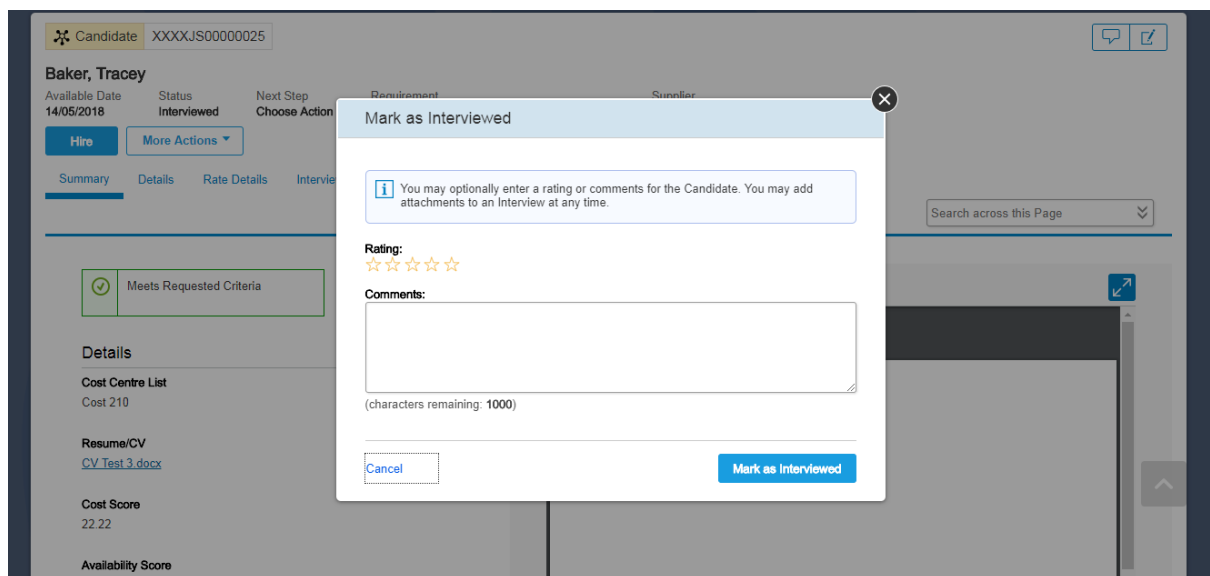
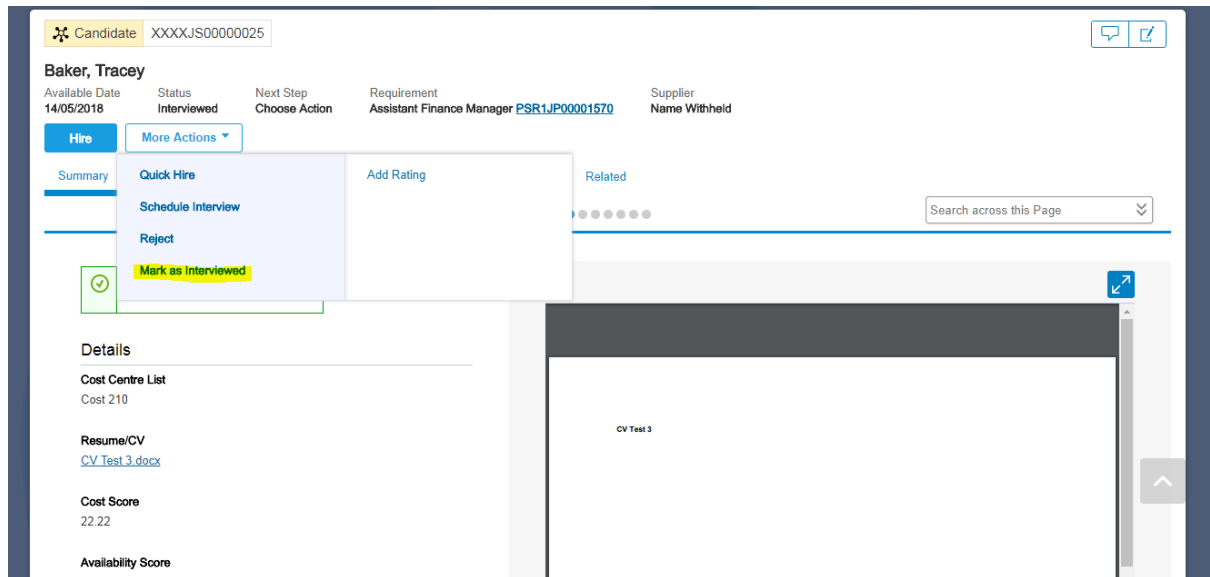
Status	ID	Start Time	End Time	Main Document ID	Name	Subject	Type	Scheduler	Interviewers
Confirmed	XXXXJS00000026	25/05/2018 18:30	25/05/2018 19:30	PSR1JP00001578	Lennon, John	1st stage Telephone	Phone	AMS PMO Team	Sarah Compton HM

Additional details: Page 1, Rows 1, 1-1 of 1. Data as of 10:19. Options: Refresh, Save as CSV.

## Providing Interview Feedback

- Once interview is complete, Mark the interview as completed and if applicable, provide feedback both in the comments box as per the below screenshots

*Please note: Free-text comments sections are visible to all CA users of Fieldglass, PSR Recruitment team, Suppliers and this detail can be requested by the candidate*

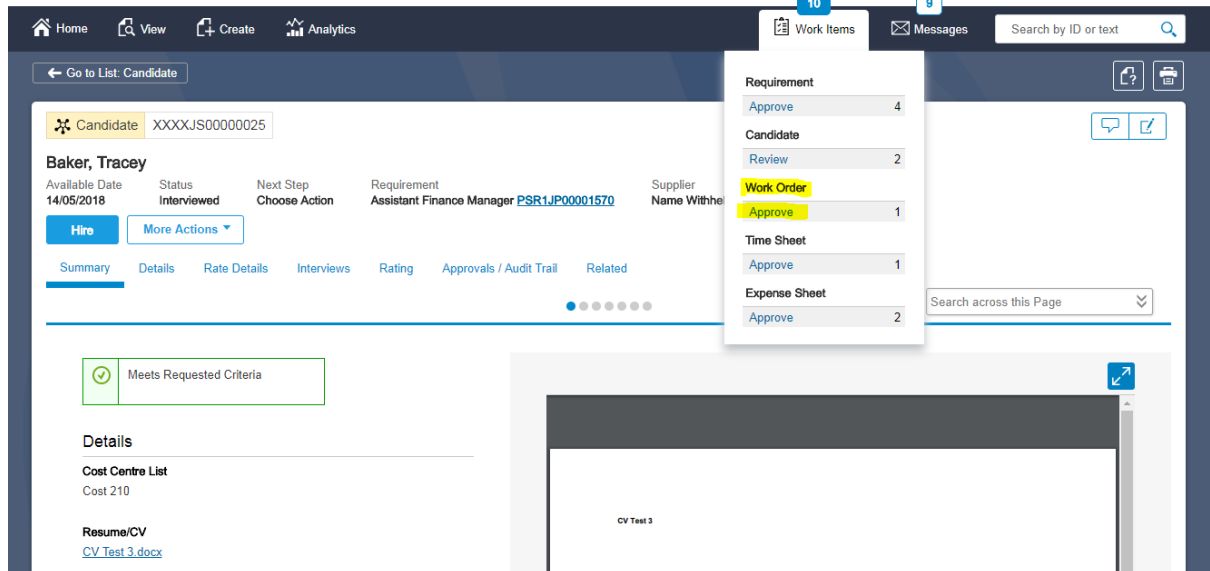


- Please also feedback to the Recruiter directly and if appropriate, they can add 'unsuccessful' candidates to the Pipeline for future consideration

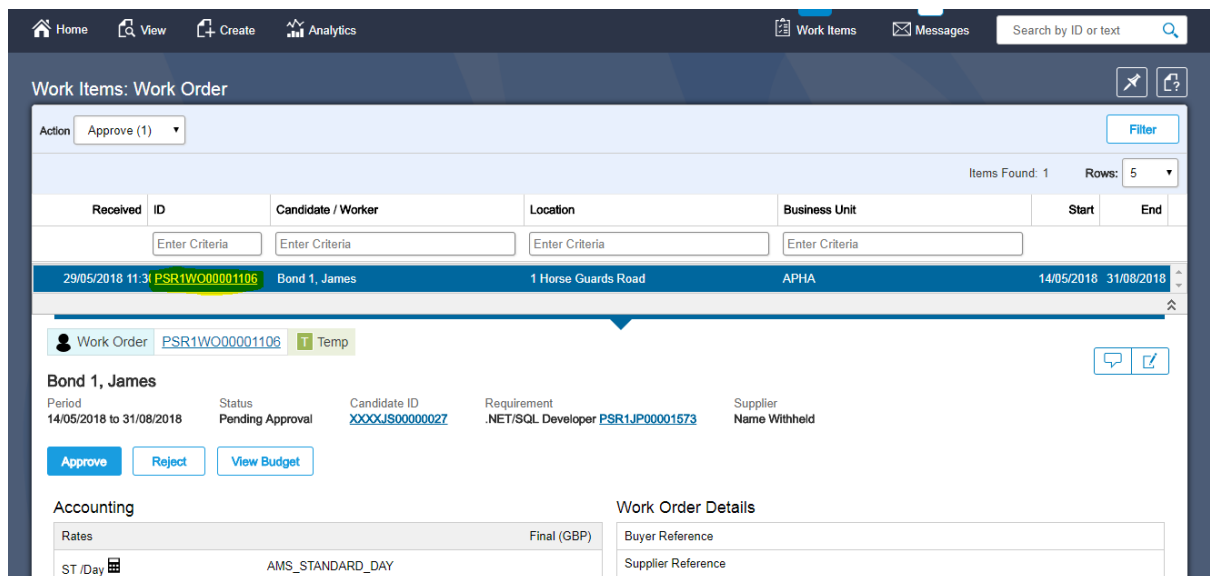
*This Pipeline is only visible to the PSR Recruitment team or the Supplier of the candidate*

## Requesting a Hire

- Once you have identified a suitable candidate for hire, contact the Recruiter directly via phone or email and agree offer details
- Recruiter will raise the Work Order and you can then view this in your Work Items for approval



- Click on the Work Order ID to review the detail



- Review the Work order information in the following sections
  - Summary
  - Details
  - Rate Details
  - Cost Allocation

- **Disregard Manage tab** – This is to be used by onboarding for candidate documentation

The screenshot shows a web application interface for managing a Work Order. At the top, there is a navigation bar with 'Home', 'View', 'Create', and 'Analytics' icons, and 'Work Items' and 'Messages' buttons. A search bar is on the right. Below the navigation bar is a breadcrumb trail: 'Go to List: Work Order'. The main content area is titled 'Work Order' with ID 'PSR1WO00001106' and a 'Temp' tag. The candidate's name is 'Bond 1, James'. Key fields include: Period (14/05/2018 to 31/08/2018), Status (Pending Approval), Candidate ID (XXXXJS00000027), Requirement (.NET/SQL Developer PSR1JP00001573), and Supplier (Name Withheld). There are buttons for 'Approve', 'Reject', 'View Budget', and 'More Actions'. Below these are tabs for 'Summary', 'Details', 'Rate Details', 'Cost Allocation', 'Manage', 'Time & Expense', 'Approvals / Audit Trail', and 'Related'. The 'Details' tab is active, showing 'Business Unit' (APHA), 'Location' (1 Horse Guards Road), 'Hours per Day' (7.40), and 'Hours per Week'. To the right is a 'Progress Status' section with a vertical timeline: 1. Request (Completed), 2. Review (Completed), and 3. Assign (In Progress).

- Click Approve or Reject.  
*Please note: Free-text comments sections are visible to all CA users of Fieldglass, PSR Recruitment team, Suppliers and this detail can be requested by the candidate*
- This will be directed back to the Recruiter for further approval and allocated to onboarding

## Approving a Timesheet

- View Timesheets for approval in Work Items

The screenshot shows the SAP Fieldglass user interface for Sarah Compton. A 'Candidate' dropdown menu is open, showing options: 'Review' (1), 'Time Sheet' (highlighted), and 'Approve' (1). The main dashboard includes a 'Workers' widget with 4 workers and 3 approaching end dates, a 'My Interviews' widget for Wednesday, May 23, 2018, featuring Hugh Grant (Contracts Manager) with 08:00 and 1 Hr, and a 'My Workers' widget showing a total of 8 workers with a status breakdown: Good (5), Warning (2), and Critical (1). There are also buttons for 'Request New Worker' and 'Contracts Manager'.

- Review time submitted, ensuring it has been allocated to the correct cost code. Time has been submitted as a maximum of 1 (1 day) against the ST/Day (Standard Day) unit as this is a day rate contractor as per below example

The screenshot shows a 'Time Sheet' approval page for requirement PSR1TS00018036. The page includes a header with 'Time Sheet' and the requirement ID, and buttons for 'Approve', 'Reject', and 'View Budget'. The 'Time Worked' table shows units worked for each day from 12/5 to 18/5, with a total of 5.00 units. The 'Accounting (GBP)' table shows a pay rate of 350.00, a rate of 465.86, and a total amount of 2,329.30 GBP.

Day	12/5 Sat	13/5 Sun	14/5 Mon	15/5 Tue	16/5 Wed	17/5 Thu	18/5 Fri	Total
Billable								
Cost 992 - Units Worked - Default								
ST/Day	-	-	1.00	1.00	1.00	1.00	1.00	5.00
Total	0.00	0.00	1.00	1.00	1.00	1.00	1.00	5.00

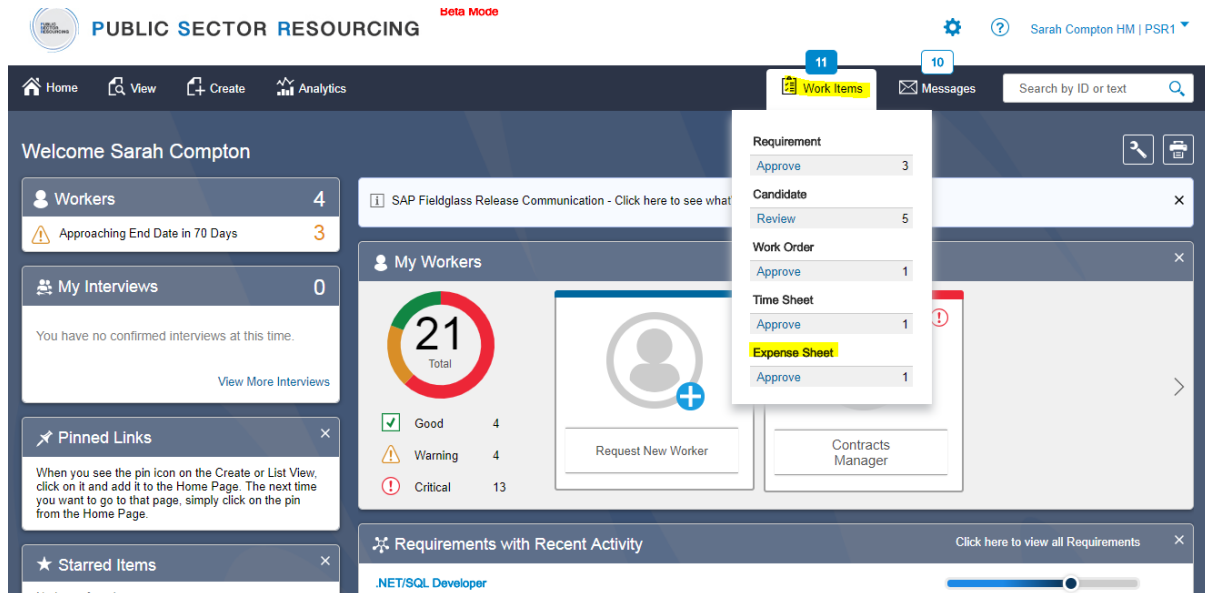
Rates	Pay Rate	Rate	Quantity	Days	Amount (GBP)
ST/Day	350.00	465.86	5.00	5.00	2,329.30
Subtotal			5.00	-	2,329.30
				Committed Spend	27,268.32
				Actual Spend	2,329.30

- It is important to review and approve Timesheets on time so they can be paid in accordance with their contractual payment terms.
- If Rejecting, provide a reason and Worker will receive rejecting notification
- Deadline for approvals - Monday by 5:30pm**
- If you are to be on leave with no access to approve, please allocate this activity to a Proxy or Delegate.
- Instructions on how to set these up are located in the 'Managing your account' section**
- If you receive email notifications to your mobile, you can approve Timesheets via a Smart Phone by clicking on the URL.

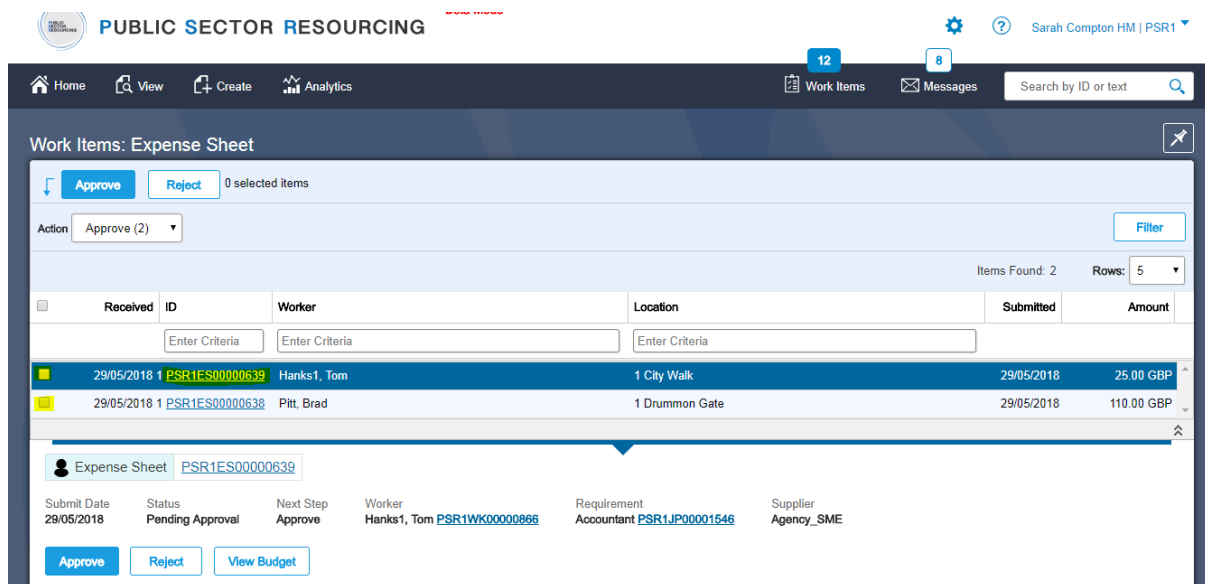


## Approving Expenses

- Select Expense Sheets from Work items



- If you have multiple expenses to approve, you can view in next step



- Click approver or reject. If rejecting, include rejection reasons and Worker will be notified

## Work Order Revision

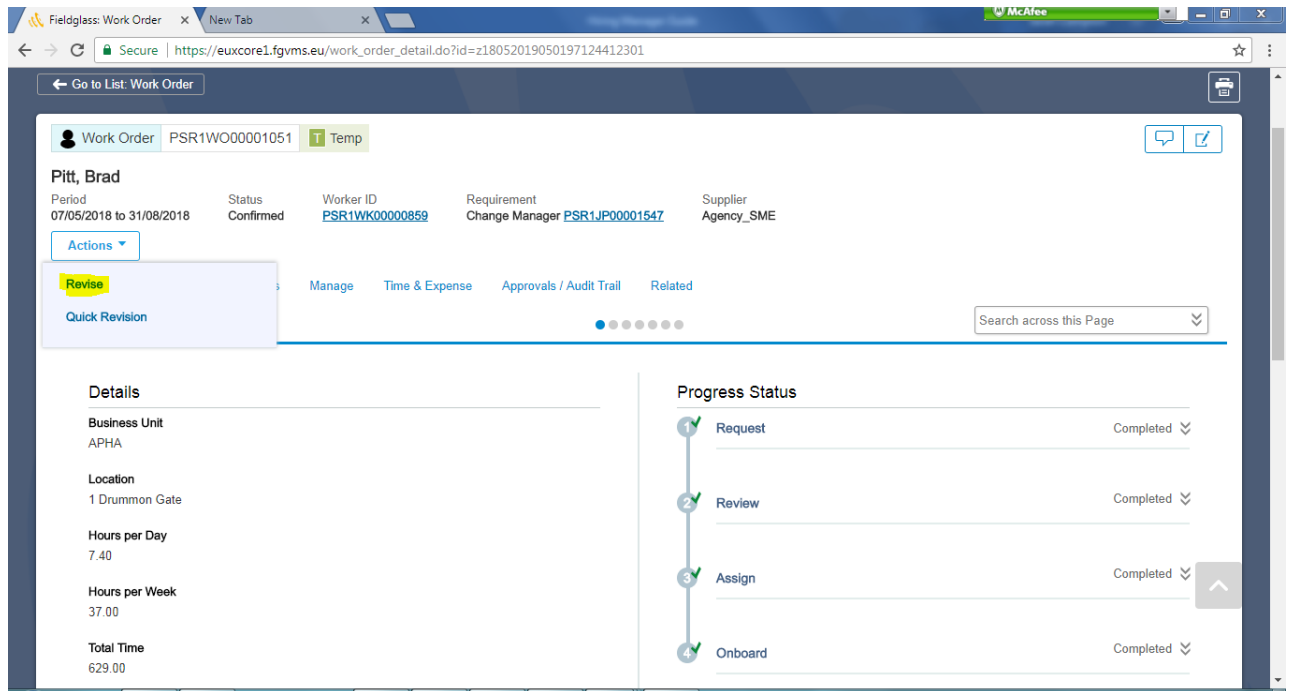
If a Work Order needs revising, e.g. expenses need to be added etc. this follows the same process as extending Work Order dates in below instructions

- Contact your PSR Recruiter via phone / email and communicate if you wish to 'Revise' a Work Order and what changes are required OR if you wish to 'Extend' the Work Order contact the appropriate team on the following email [Workorders@publissectorresourcing.co.uk](mailto:Workorders@publissectorresourcing.co.uk)
- Alternatively, click on the View tab to review your Live Work Orders

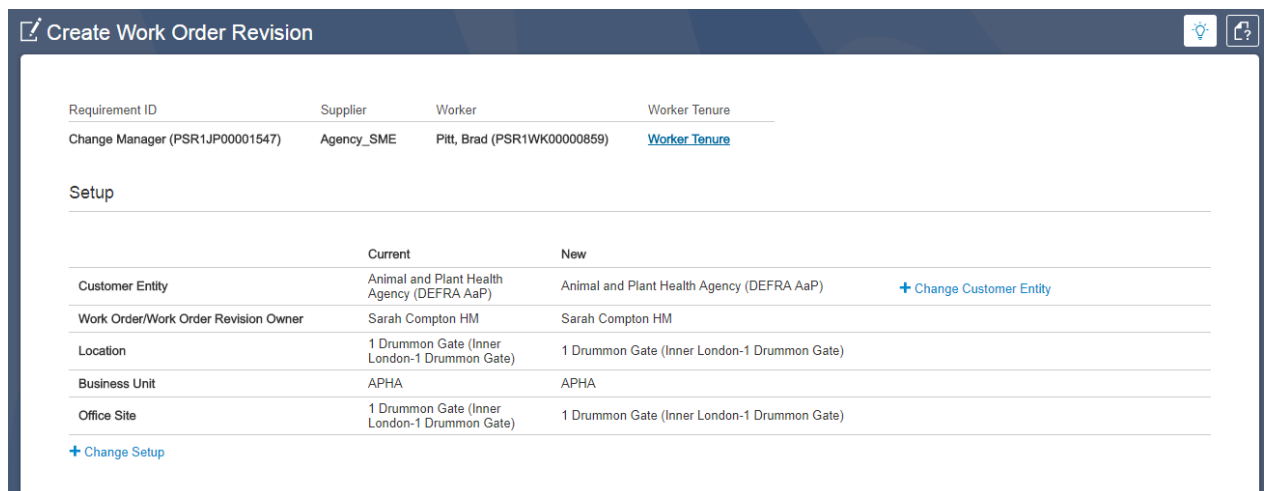
- Locate the 'Confirmed' Work Order you want to revise

Status	ID	Revision	Candidate / Worker	Candidate ID	Supplier	Location	Start	End	Type
Pending Review	<a href="#">PSR1WO00001073</a>	0	Grant, Hugh	XXXXJS00000021	Name Withheld	1 Drummon Gate	07/05/2018	31/05/2018	Temp
Confirmed	<a href="#">PSR1WO00001051</a>	0	Pitt, Brad	A013JS00000020	Agency_SME	1 Drummon Gate	07/05/2018	31/08/2018	Temp
Confirmed	<a href="#">PSR1WO00001050</a>	0	Hanks1, Tom	A013JS00000019	Agency_SME	1 City Walk	14/05/2018	31/07/2018	Temp
Confirmed	<a href="#">PSR1WO00001049</a>	0	Workertest1, Jessy	A013JS00000018	Agency_SME	1 City Walk	07/05/2018	31/05/2018	Temp
Confirmed	<a href="#">PSR1WO00001041</a>	0	Worker1, Sarah	A014JS00000004	Agency_Preferred	1 Horseguards Road	28/05/2018	07/06/2018	Temp

- Click on Revise under Actions



- Manage any required changes with the Work Order revision Setup



- Enter New Work Order dates or enter new duration if applicable and you are 'extending' the Work Order
- Review Timesheet set-up and ensure the working hours are as agreed with the candidate



Estimates	Current	New
Billable Per Diem(optional)	0.00	<input type="text"/>
Estimated Additional Spend(optional)	0.000	<input type="text" value="0.000"/> %
Estimated Expenses(optional)	0.000	<input type="text"/> %
Flat Adjustments(optional)	0.00	<input type="text" value="0.00"/>
Committed Spend	50,912.45	25,755.71
Revised Committed Spend	50,912.45	
Cumulative Committed Spend	50,912.45	76,668.16 <span style="background-color: yellow;">Calculate</span>
Spend to Date		5,390.73
Other Pending Spend		0.00
Remaining Spend		71,277.43

- You can calculate the new Committed Spend as per the above example
- Review Cost Allocation and make any necessary changes
- Select reason for revision in the list of drop down options
- Complete Final Screening Information – *this field should be pre-populated in the Live Fieldglass System environment after onboarding have completed all activity*
- Edit the Purchase Order information if required. If unknown, type ‘New PO in progress’ or ‘PO uplift requested’
- Edit original Work Order information as necessary, i.e. expenses / special payments

**Reason for Revision \***

**Region \***

**Level of screening \***

**Final Screening Level \***

**Purchase Order Number \***

**Purchase Order value \***

**Bulk PO \***

**Expense Provisions \***

**Special Payments \***

- Revise any detail from the Original Work order, i.e. Special T&C, In Scope for AWR, Notice period of contractor, original start date of Worker
- Add any relevant attachments, e.g. Work Order revision approval trail

Special T&C \*  
N/A

Additional Contract Information \*  
N/A

In scope AWR? \*  
Yes

Reason for out of scope, please type NA if the worker is in scope. \*  
N/A

Notice Period Contractor \*  
1 month

Original start date \*  
07/05/2018

Contingent Labour   
Yes

Attachments

No Attachments Defined

[+ Add Attachments](#)

[Cancel](#)

[Complete Later](#)

[Continue](#)

- Click continue
- Review the revised detail and if satisfied, click Submit

**Create Work Order Revision**

Requirement ID	Supplier	Worker	Worker Tenure
Change Manager (PSR1JP00001547)	Agency_SME	Pitt, Brad (PSR1WK00000859)	<a href="#">Worker Tenure</a>

Setup [Make Changes](#)

	Current	New
Customer Entity	Animal and Plant Health Agency (DEFRA AaP)	Animal and Plant Health Agency (DEFRA AaP)
Work Order/Work Order Revision Owner	Sarah Compton HM	Sarah Compton HM
Location	1 Drummon Gate (Inner London-1 Drummon Gate)	1 Drummon Gate (Inner London-1 Drummon Gate)
Office Site	1 Drummon Gate (Inner London-1 Drummon Gate)	1 Drummon Gate (Inner London-1 Drummon Gate)
Business Unit	APHA	APHA

Work Order Dates

[Cancel](#) [Complete Later](#) [Submit](#)

## PUBLIC SECTOR RESOURCING

- You will receive alerts, 10, 7, 4 and 2 weeks prior to the end date of a Worker until a revision is submitted. If you are not extending, please notify the team on the below email address.
- Do not turn off notifications as you may miss important Work Items and please start the extension process as soon as possible if required.
- Please notify the PSR team if you are planning to extend the assignment or if it will finish on the original agreed end date [extensions@publicsectorresourcing.co.uk](mailto:extensions@publicsectorresourcing.co.uk)

# Appendix

## Raising an hourly rate requirement

*Temporary solution; whilst hourly rate requirement templates are built in the system*

- If you are raising a Requirement for an hourly role, please type in 'hr' in the 'ST Bill rate' field and add 'Standard Hourly Template' to Title
- This will bring up 2 generic hourly templates for either Ltd or PAYE, which you can customize. (you can choose either if unknown currently and Worker pay type can be confirmed at Work order stage)

Billing Currency  
GBP [Make Changes](#)

Select Source [i](#)

Creating a Requirement can be accomplished by either selecting a Requirement Template or a Requirement. The Cards View displays Starred and recently used sources for easy access and provides advanced search capabilities. The List View provides a full list of available sources.

View  Requirement Templates  Requirements Cards List

Title Items Found: 2 Rows: 1000 [Filter](#)

Title	Category	ST Bill Rate	Description
standard	All	hr	Enter Criteria
<a href="#">Standard Hourly LTD Template</a>	Niche	1.00 - 100.20 /Hr	<a href="#">i</a>
<a href="#">Standard Hourly PAYE Templat</a>	Niche	1.17 - 116.53 /Hr	<a href="#">i</a>

- Edit the 'Title' on the requirement
- Complete the requirement as standard



Owner: Sarah ComptonAdmin | Billing Currency: GBP | Job Template Title: Standard Hourly LTD Template

**IR35 Legislation - ACTION REQUIRED**  
 You are required to assess whether the role is in/out of scope of IR35 Legislation by using the HMRC ESS Tool (link below). For out of scope assessments the HMRC ESS PDF must be attached to the role. For further guidance please contact the PSR Helpdesk on 020 0203 862 2487 or email helpdesk@publicsectorresourcing.co.uk.  
<https://www.gov.uk/guidance/check-employment-status-for-tax>

**Details**

Start Date \*  End Date \*  DD/MM/YYYY or [Enter job duration](#)

Number of Positions \*

Title \*

Description (optional)

Cancel Complete Later Continue

# Customising your account

## Accessing your Profile

- Click your name at the top right of the Fieldglass page to access your profile.

The screenshot shows the Public Sector Resourcing dashboard for user Sarah Compton. The top navigation bar includes Home, View, Create, Analytics, Work Items, and a notification bell. The main dashboard area displays a welcome message, a 'Workers' widget with 3 items, an 'Approaching End Date in 70 Days' alert with 2 items, and a 'My Interviews' widget with 0 items. A 'My Workers' section shows a total of 8 workers with a breakdown: 3 Good, 3 Warning, and 2 Critical. There are buttons for 'Request New Worker' and 'Contracts Manager'. A 'Requirements with Recent Activity' section is also visible.

The user profile dropdown menu is open, showing 'Personal Settings' with 'My Profile' and 'My Preferences' options. Below this is a 'Linked Accounts' section listing various roles and teams:

Account Name	Role/Team
Sarah Compton Admin Administrator	PSR1
Alyson Nash HM Hiring Manager	PSR1
AMS PMO Team AMS PMO Team	PSR1
AMS Triage2 AMS Triage PMO	PSR1
AMS Triage3 AMS Triage PMO	PSR1
AMS Onboarding AMS Onboarding and Extension Team	PSR1
Agency, Preferred Administrator	A014
Agency, Approved	A00P

- View your organisational structure, account set-up and you can manage your Linked accounts, Proxies and Delegate settings.

**Organizational Structure** 🔒

Default Customer Entity	Primary Business Unit	Default Location	Default Cost Centre
Department for Communities and Local Government (DCLG)	Department for Communities and Local Government (DCLG)	(No Value)	(No Value)
<a href="#">My Customer Entity List</a>	<a href="#">My Business Unit List</a>	<a href="#">My Location List</a>	<a href="#">My Cost Centre List</a>

**Linked Accounts** Edit

Links from Your Account	Links to Your Account
Public Sector Resourcing (PSR1) - sarahcompton_sysadmin	Public Sector Resourcing - sarahcompton_sysadmin

**Proxies & Delegates** Edit

Your Proxies	Proxy For	Your Delegate	Delegate For
Sarah Compton Admin	(No Value)	(No Value)	(No Value)

**Approvers & Supervisors** 🔒

Primary Supervisor	Approvers & Supervisors
James Parker Sysadmin	(No Value)

## Linked Account

*A linked account is used if you have more than 1 user account and want to switch between them easily, e.g. you may be a Hiring Manager and a Reporting User*

- You will need both the username and password of the profile to link an account.

Links from this User Account

Sort Order	Company
-	Public Sector Resourcing (PSR1)

[+ Add Linked User Account](#)

Links to this User Account

Link to this user account is **ENABLED**  
[DISABLE link to this user account](#)

Company	Name
Public Sector Resourcing	Sarah Compton

**Add Linked User Account** ✕

**Username \***

**Password \***

Nick Name (optional)

Sort Order (optional)

Please enter the password for the account you are currently signed in to. \*

Cancel
Add

User Role

Administrator	<a href="#">✕ Remove</a>
---------------	--------------------------

User Role

Administrator	<a href="#">✕ Remove</a>
---------------	--------------------------

[Change My Password](#)

Login Time: 22/05/2018 15:27 BST

SAP Fieldclass March 2018 | 001

## Proxies

*Proxies can manage only certain activity on your behalf. If they do not have the user permissions you have, they will not be able to action your work items, only view them. Please select a 'Proxy' who has the same level of permissions or higher*

- You do not need the password of the Proxy to add them.
- Add a Proxy if you want assistance with your Work items or to cover leave.
- Choose a start and end date for this access
- If you are assigned as a Proxy and items need attention but do not have the permissions, request the user assign someone else or ask PSR Admin to assist  
[helpdesk@publicsectorresourcing.com](mailto:helpdesk@publicsectorresourcing.com)

The following Users are your Proxy

Name	Role	Work Items	Start	End
Sarah Compton Admin				

+ Add Proxy

You are Proxy for the following Users

Note: You are currently not a Proxy for any User Account

Your Delegate

Please be aware that by assigning a Delegate you are giving them more visibility and permissions than they currently have.

Note: You currently do not have any Delegates assigned

+ Add Delegate

Delegate For

Note: You are currently not a Delegate for any User Account

**Add Proxy**

Work Items:  
 All  Time Sheet

Proxy:

Role:

Start Date:  
 DD/MM/YYYY

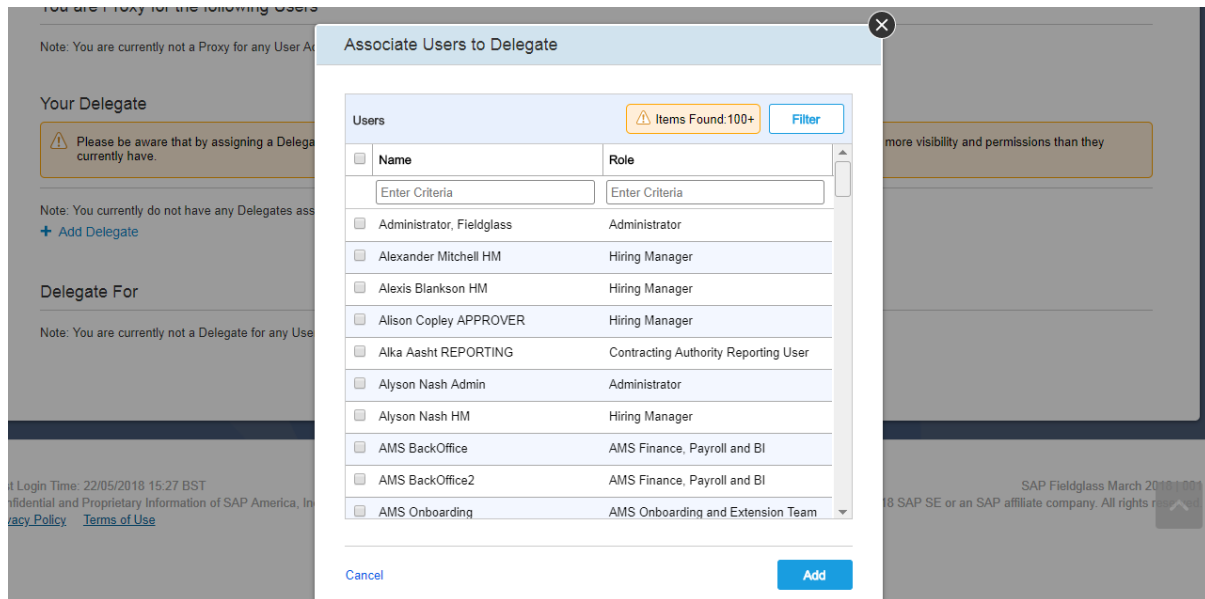
End Date:  
 DD/MM/YYYY

Cancel Add

## Delegates

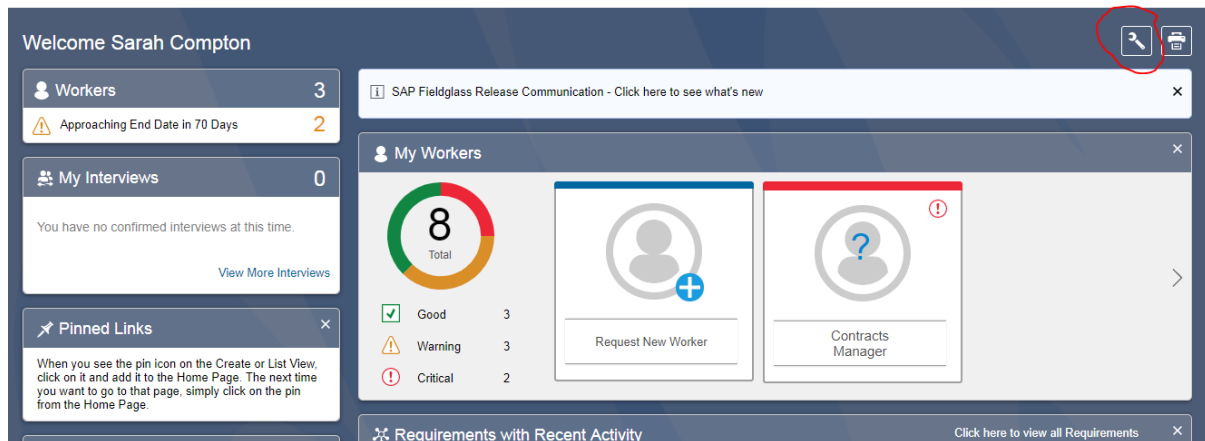
If you assign a Delegate, this user will inherit all actions and visibility you have, even if it is at a higher level or otherwise restricted.

- You do not need the password of the Delegate to add them.
- There are no start / end date settings when you choose a Delegate



## Home page customising

- Customise your home page by clicking on the tool icon.
- Remove tabs by clicking 'off' or move the tabs in order of priority.



- Remove tabs by clicking 'off' or move the tabs in order of priority.

Welcome Sarah Compton

You are now in Customization mode for your Home page. The sections listed below can be displayed or hidden by clicking 'On' or 'Off' for each section. When you are finished, click Done to return to the display mode. Done

On  Off

**Workers** 3

On  Off

**Approaching End Date in 70 Days** 2

On  Off

**My Interviews** 0

You have no confirmed interviews at this time.

[View More Interviews](#)

On  Off

**Pinned Links**

When you see the pin icon on the Create or List View,

On  Off

On  Off

SAP Fieldglass Release Communication - Click here to see what's new

**My Workers**

9 Total

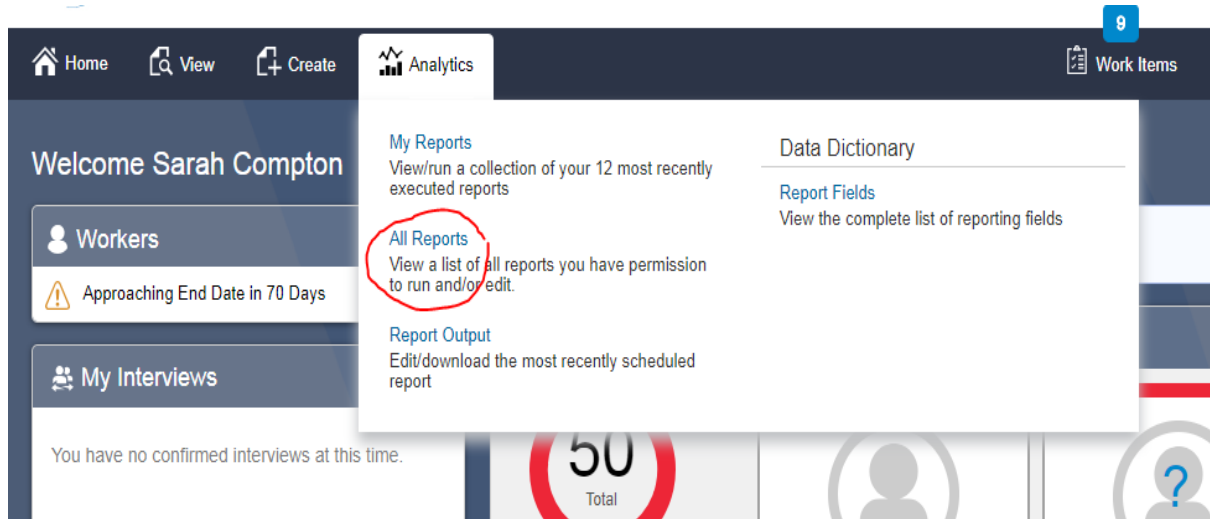
Good	4
Warning	3
Critical	2

On  Off

# Self-Service Reporting

## Fieldglass Pre-defined reports

- Access pre-defined reports via the Analytics menu and click on 'All Reports'



- Here you will see a list of the reports you have permissions to view & run.
- Choose the report you want to access

Report List

**FILTERS**

- All Reports
- My Reports
- Published Reports
- Past Reports

**FOLDERS**

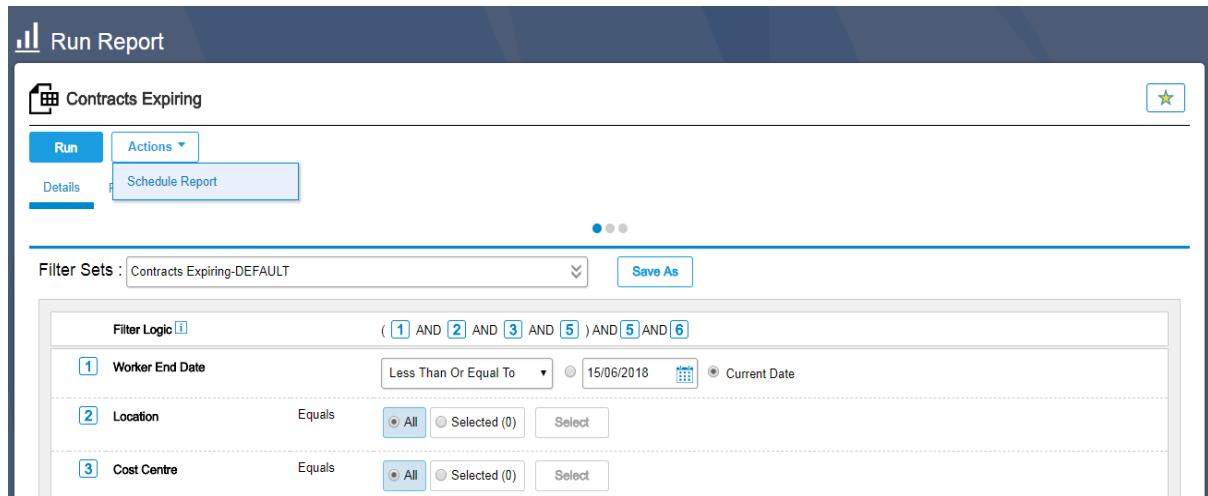
- All
- Spend
- Status
- Summary
- Worker

All Reports/All Folders

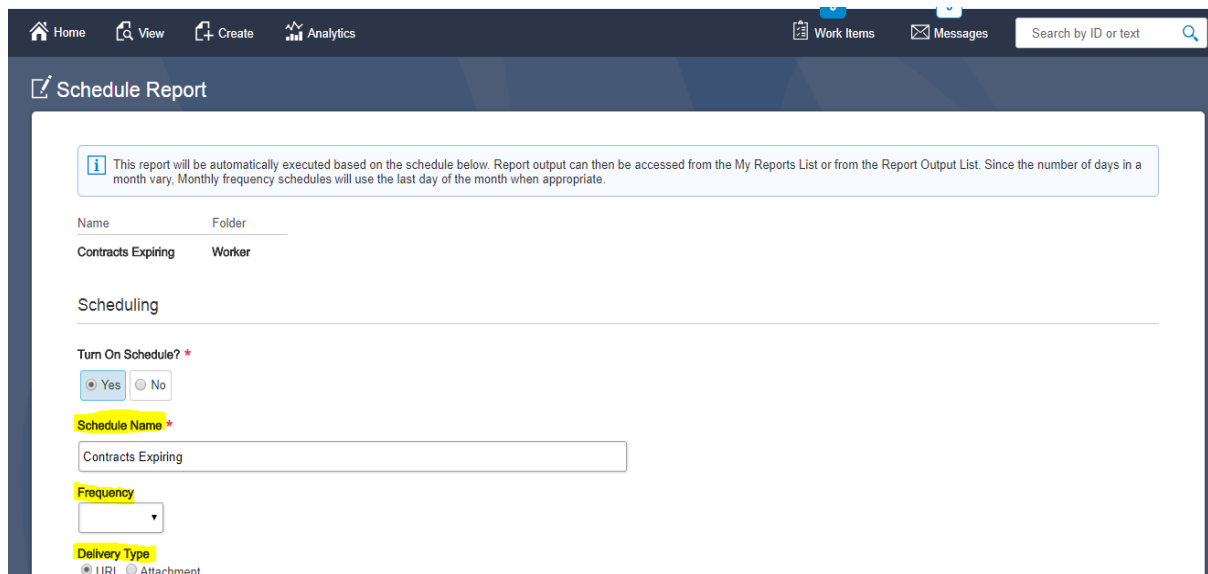
Items Found: 23 [Filter](#)

Name	Description	Base Module	Folder	Owner	Type	Company Name	Last Run Date (..
<a href="#">Contracts Expiring</a>		Worker	Worker	Predefined	Report	SAP Fieldglass	13/06/2018 16:29
<a href="#">Draft Time Sheets</a>		Time Sheet	Status	Predefined	Report	SAP Fieldglass	13/06/2018 16:31
<a href="#">Expense Sheet Status</a>		Expense Sheet	Status	Predefined	Report	SAP Fieldglass	01/05/2018 13:31
<a href="#">Invoice Spend by Invoice</a>	This report displays Invoice		Spend	Predefined	Report	SAP Fieldglass	11/06/2018 14:34
<a href="#">Invoice Spend by Invoice</a>	This report displays Invoice		Spend	Predefined	Report	SAP Fieldglass	11/06/2018 14:28
<a href="#">Invoice Status</a>		Invoice	Status	Predefined	Report	SAP Fieldglass	15/05/2018 18:17
<a href="#">Job Posting Status</a>		Requirement	Status	Predefined	Report	SAP Fieldglass	31/05/2018 11:58
<a href="#">Job Seeker Selection Hisj</a>		Worker	Worker	Predefined	Report	SAP Fieldglass	12/06/2018 18:05
<a href="#">Job Seeker Status</a>		Candidate	Status	Predefined	Report	SAP Fieldglass	12/06/2018 18:03

- Once you've selected the report you wish to view, you can choose to Run or under Actions, you can 'Schedule' the report



- At this point, you will need to change the Schedule Name as there cannot be duplicate report names in the system, e.g. Contracts Expiring – Joe Smiths (Hiring Manager) Workers
- You can then choose the Frequency of the delivery of the report, i.e. Daily, Weekly, Bi-Weekly, Monthly, By Day (specific day of week) Quarterly, Annually, Run Once.
- Next step is to choose whether you want to receive the report via a URL or an Attachment.



- If you are sending the report via email, you can add the recipient email addresses and choose whether to Encrypt the Attachment and add a Public Key

**Delivery Type**  
 URL  Attachment

**Encrypt Data** (optional)  
 Yes  No

**Public Key** (optional)

(characters remaining:10000)

**Email Addresses:**  
 Values separated by commas or semicolons.

(characters remaining:1000)

**Start Date/Time**  
 DD/MM/YYYY

- Choose a Start Date/Time for the report to be run
- You can view the Filters in the report and amend dates and the Filter logic as necessary

**Filters**

**Filter Logic** ( 1 AND 2 AND 3 AND 5 ) AND 5 AND 6

1	Worker End Date	Less Than Or Equal To		15/06/2018	<input checked="" type="radio"/> Current Date
2	Location	Equals	<input checked="" type="radio"/> All <input type="radio"/> Selected (0)	<input type="button" value="Select"/>	
3	Cost Centre	Equals	<input checked="" type="radio"/> All <input type="radio"/> Selected (0)	<input type="button" value="Select"/>	
5	Worker Status	Equals	Open		
5	Rate Category Column Filter	Equals	<input checked="" type="radio"/> All <input type="radio"/> Selected (0)	<input type="button" value="Select"/>	
		Group Columns By	<input checked="" type="radio"/> Type of Field - Rate [ST /Hr], Rate [OT /Hr], Amount [ST /Hr], Amount [OT /Hr] <input type="radio"/> Rate Category - Rate [ST /Hr], Amount [ST /Hr], Rate [OT /Hr], Amount [OT /Hr]		
6	Cost Centre Scope	Display	<input type="text" value="All"/>		

- Finally, in the Setup of the report, you will be able to Run the report for Data that is associated to you (unless you are a Cost Centre owner and can see report for the Group)
- Choose the Formatting Output, i.e. XLSX, XLS, CSV, CSV Data Only or PDF and click Save to finish setting up this report schedule

**Setup**

---

**Run As User**  
 Sarah Compton HM

**Data Source \***  
 Latest

**Show Data For \***  
 My Own

---

**Formatting**

**Output Format \***  
 XLSX  XLS  CSV  CSV Data Only  PDF

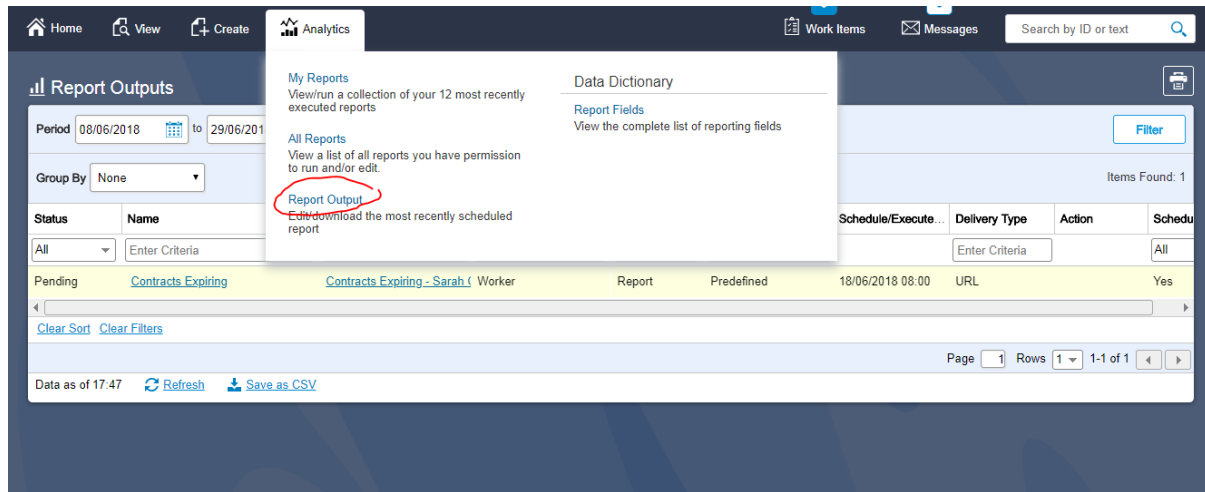
**Font Name \***

**Orientation \***

[Cancel](#)

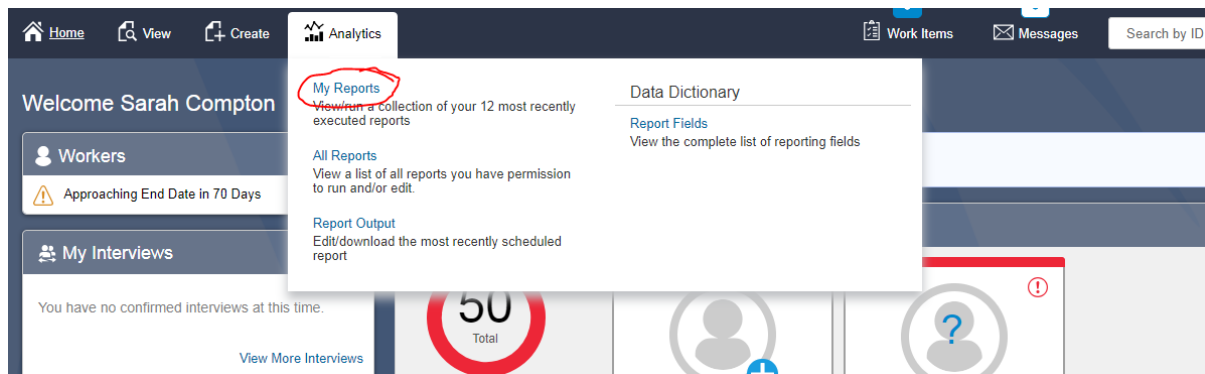


- If you need to amend any Scheduled reports, click on Report Output to Edit/Download




## My Reports

- Under the Analytics menu, in the My Reports section which displays the most recent 12 reports you have executed



- You can also 'Star' a report if you want to create a quick link on your Home Page

Run Report

Contracts Expiring 

Run Cancel Actions

Details Related Items Previous Runs

Filter Sets : Contracts Expiring-DEFAULT Save As


Filter Logic ( 1 AND 2 AND 3 ) AND 5 AND 6

1 Worker End Date Less Than Or Equal To 15/06/2018 Current Date

- It will then be visible on Starred Items

Home View Create Analytics


Welcome Sarah Compton

Workers	7
 Approaching End Date in 70 Days	1
My Interviews	0


You have no confirmed interviews at this time.

[View More Interviews](#)

Pinned Links

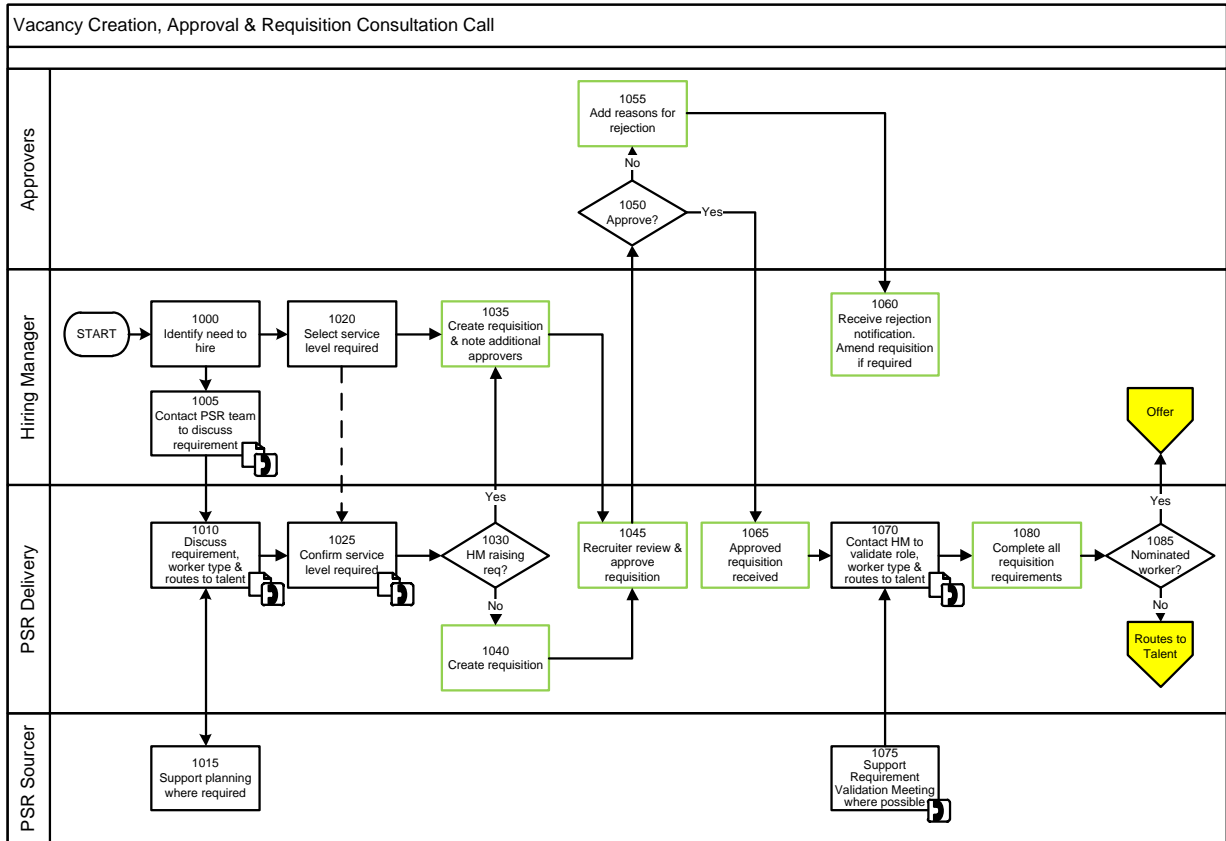
-  Create Requirement - Temp

Starred Items [View All](#)

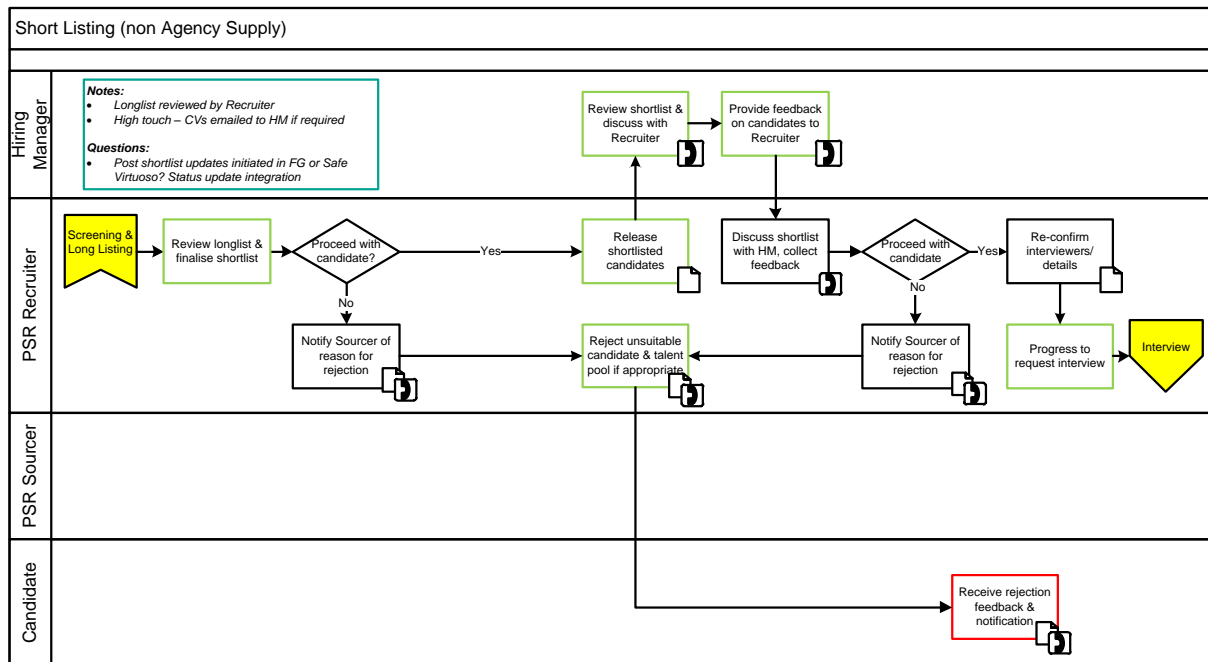
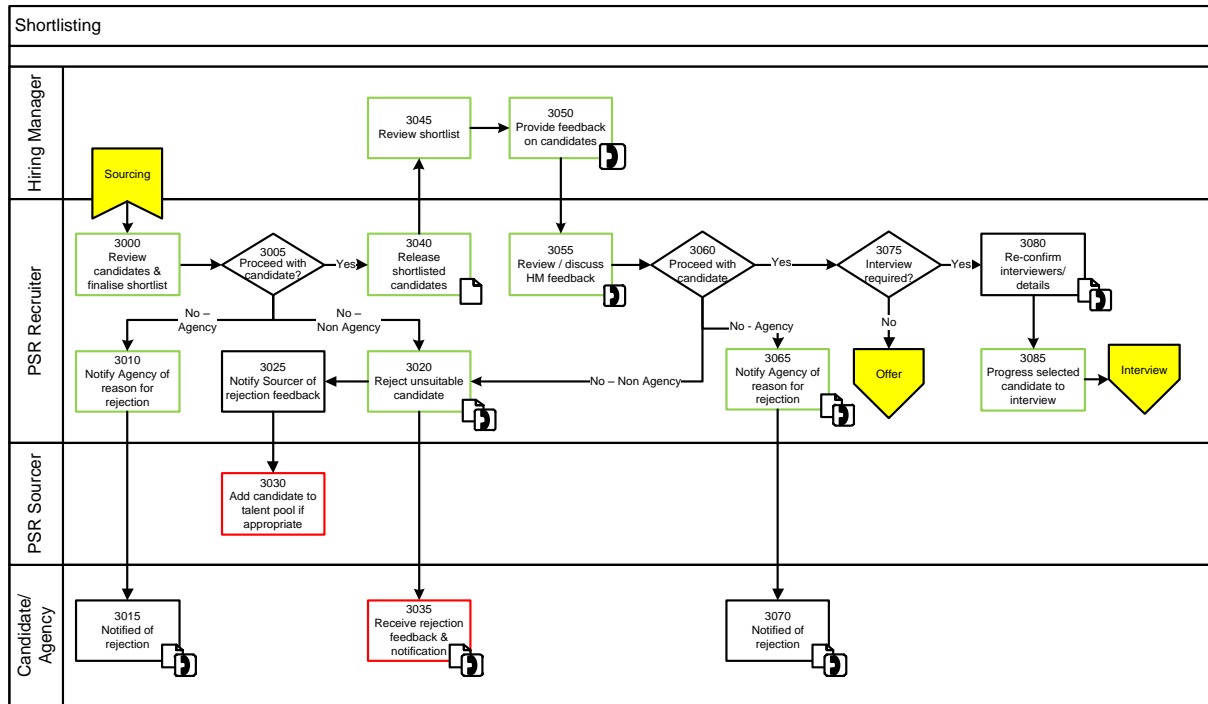
-  **Reports:** Contracts Expiring

# Process Flows

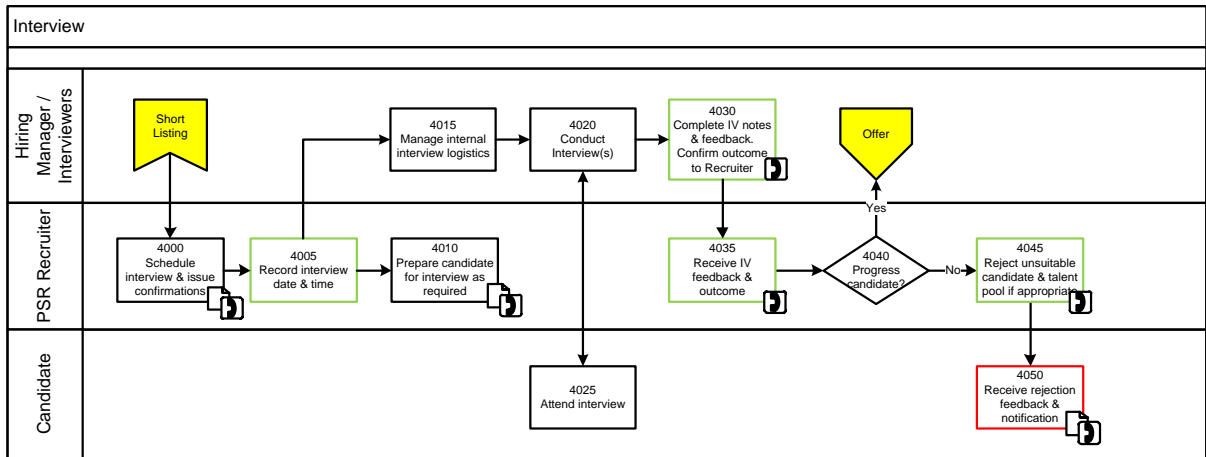
## Requirement creation



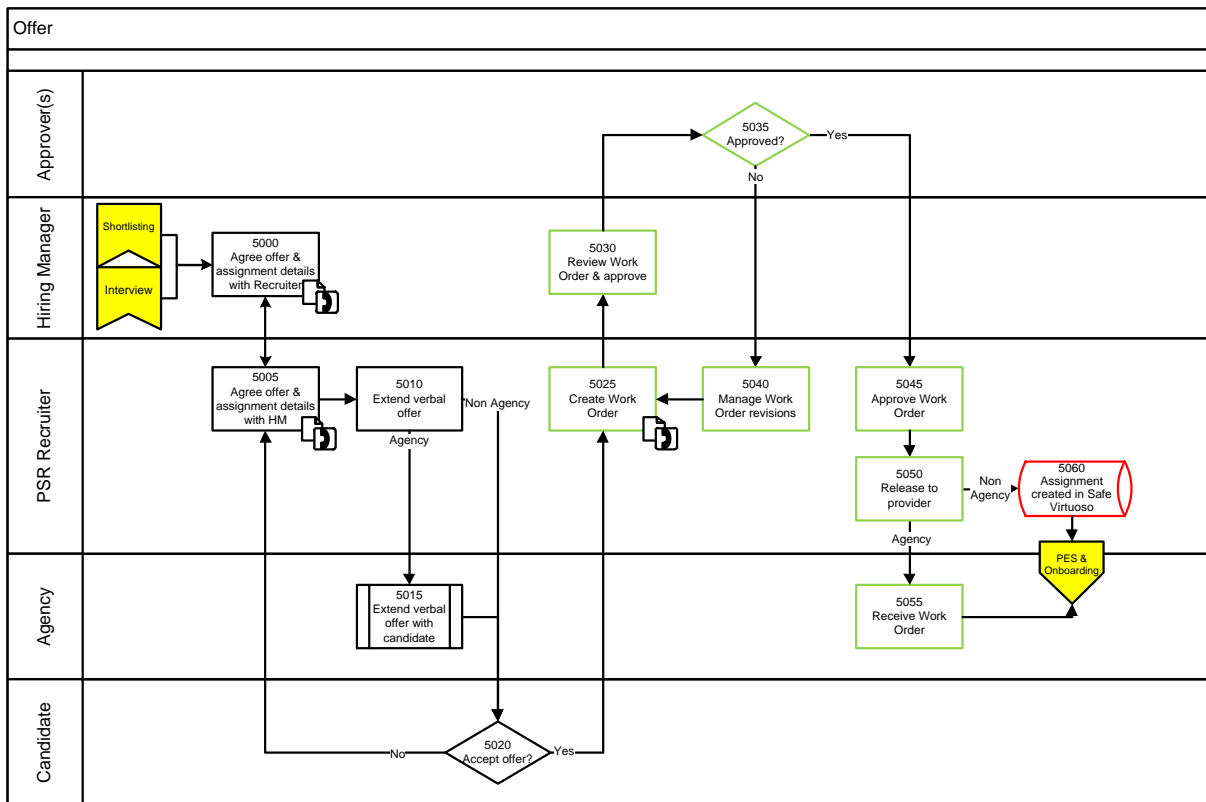
# Shortlisting



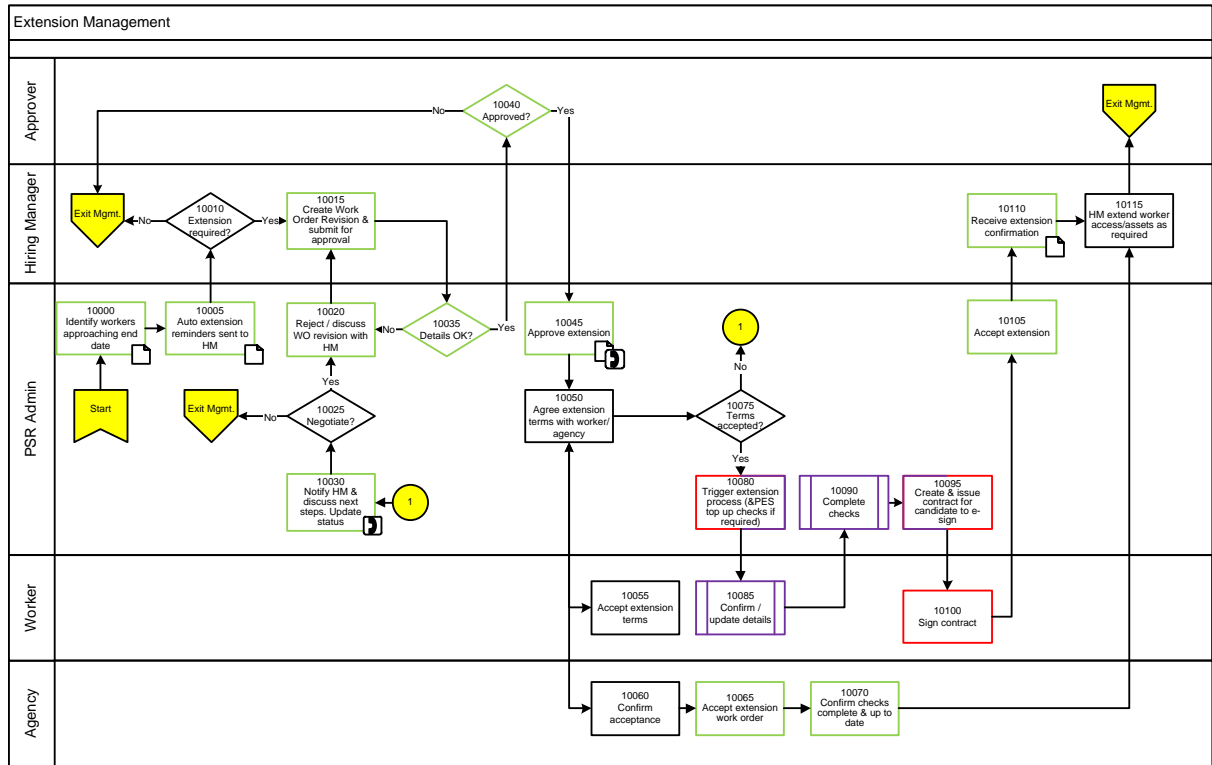
# Interviewing



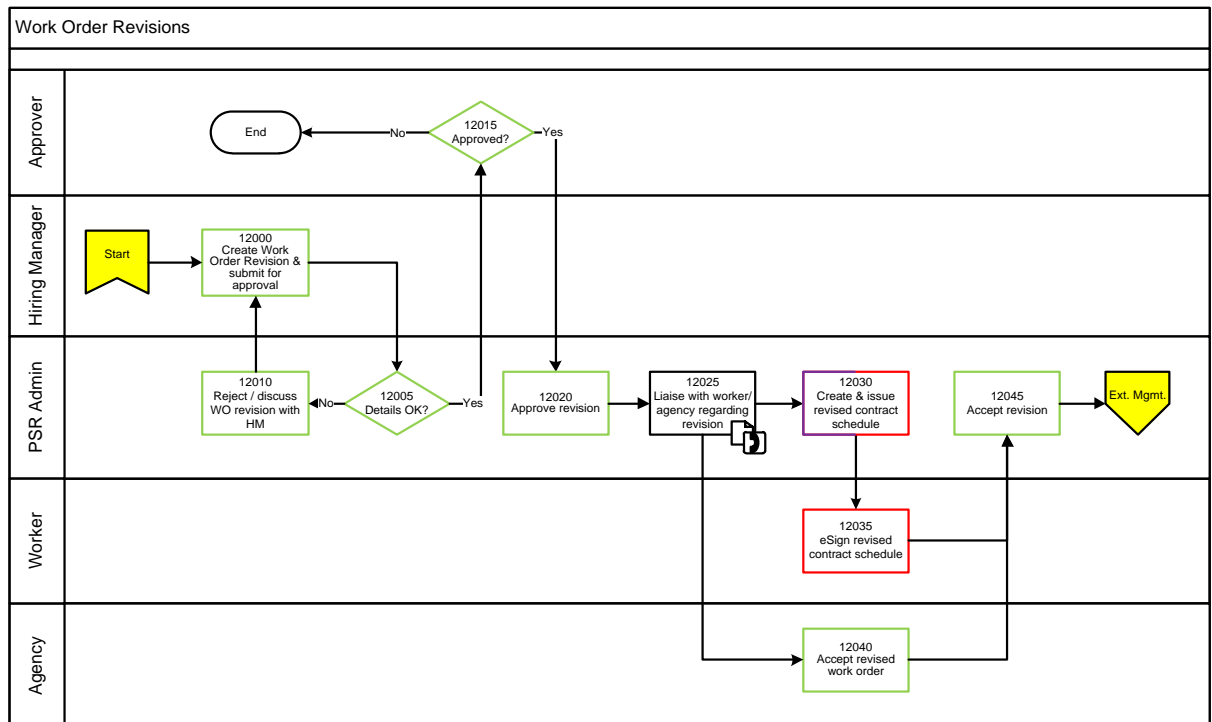
# Offer



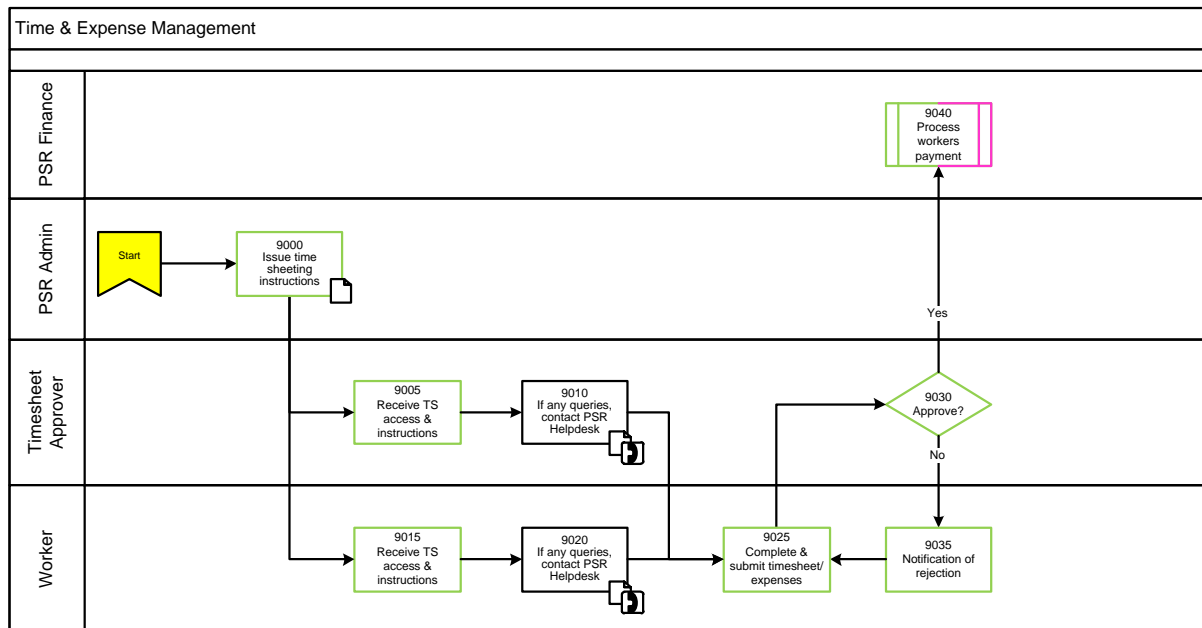
# Extension Management



# Work Order Revisions



## Approving Timesheets



# Thank you

For any queries, please contact the PSR Helpdesk [helpdesk@publicsectorresourcing.co.uk](mailto:helpdesk@publicsectorresourcing.co.uk) or review the list of PSR Contacts on the 'Hiring Manager Quick Reference Guide'

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