



SAP Ariba 

# Feature at a glance

## Template Upgrade for Supplier Registration

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Confidential

 **Run Simple**

# Feature at a Glance

## Introducing: Template Upgrade for Supplier Registration

Ease of implementation  Low-touch/simple  
Geographic relevance  Global

### Customer challenge

Current Supplier Management template can be updated and released as new version of the template. All new (registration) projects that are initiated will use the newly published template version. However, for supplier (registration) projects that were initiated and completed before the change based on the previous template version, the associated suppliers are not notified of any changes to the (registration) template. This results into inconsistency of the available supplier information across the supply base.

### Meet that challenge with **SAP Ariba**

This feature introduces the ability to upgrade existing supplier registration projects that were created with previous template versions to the latest published template version. The SM administrator can manage the upgrade process by selecting groups of suppliers impacted by the template change for each of the previous template versions, by triggering the template upgrade, and sending an automatic notification to the primary contact at each supplier.

### Experience key benefits

Getting suppliers on the latest version of registration questionnaire(s) results in a more consistent and up-to-date data set in Ariba, and through synchronization also in ERP.

### Solution area

SAP Ariba Supplier Lifecycle and Performance (SLP), SAP Ariba Supplier Information and Performance Management (SIPM) new architecture

### Implementation information

This feature (SM-3066) is enabled by default after the General Availability release mid May 2018.

### Prerequisites and Limitations

In order to see “Template Upgrade” in SM Admin, also feature SM-5663 “Admin v2” needs to be enabled. Ask Ariba customer support in case the Template Upgrade tab is not visible. For limitations, see details section.

## Feature at a Glance

# Introducing: Template Upgrade for Supplier Registration

## Detailed feature information

SM offers multiple templates and customers can create multiple questionnaires inside these templates. It is anticipated these templates and questionnaires will change over time. This feature introduces the ability to upgrade existing supplier registration projects that were created with previous template versions to the latest published template version for eligible supplier registration projects. Eligible supplier registration projects means projects in completed or non started states such as Invited, Registered and Denied. Projects with active tasks or projects In Registration status are not eligible for upgrade; once active tasks get completed they become eligible for upgrade.

### Prerequisites

- To perform a template upgrade the user must be part of the SM Ops Administration group.
- To add custom content to the configurable notification to suppliers, define the custom content under Administration > Project Email Templates

### Process

- As user w role Template Creator, go to Administration > Templates and find the SM Registration Project template, create a new version and update it and publish the new version.
- As user with role SM Ops Administrator, go to SM Administration Template Upgrade page to perform the upgrade. Access the Template Upgrade Tab and click Find Projects. The latest published version of the template is shown and the number of registration projects by version will be shown. The eligible projects will have the action “Upgrade” available.
- Select if suppliers should be notified and click Upgrade for respective projects to be upgraded
- Enter an optional note to the suppliers primary contact. This note is inserted in the notification.
- Track progress in Upgrade Status page

### Limitations

- Cannot view or download the supplier projects for each project version
- When projects get upgraded to new version, the older project version gets archived and system sends a notification to project owner about project being archived. This notification cannot be turned off.
- When the template has multiple external questionnaires but only one gets updated and supplier has been invited to all the questionnaires, system will send one template upgrade notification per questionnaire to the supplier.

# Template Upgrade for Supplier Registration

	Impact of the Template Upgrade on supplier projects with supplier registration status..		
Type of Template Change..	Status = Invited	Status = Registered	Status = Denied
<b>Add new questionnaire</b>	Not applicable for External questionnaires  Applicable for Internal questionnaires	Not applicable for External questionnaires  Applicable for Internal questionnaires	Not applicable for External questionnaires  Applicable for Internal questionnaires
<b>Add new question or section to existing questionnaire</b>	Email invitation link will point to the updated version.  Internal questionnaire will be updated with the new addition	New version replaces old version all existing values get copied to new version and new question or sections will appear.	New version replaces old version and remains closed for a Denied supplier
<b>Modify question or section</b>	Email invitation link will point to the updated version  Internal questionnaire will be updated with the updated question or section	All modifications are allowed. Data type changes remove previous values	New version replaces old version and remains closed for a Denied supplier

# Template Upgrade for Supplier Registration

	Impact of the Template Upgrade on supplier projects with supplier registration status..		
Type of Template Change..	Status = Invited	Status = Registered	Status = Denied
<b>Delete section or question</b>	Email invitation link will point to the updated version  Internal questionnaire will be updated with the updated question or section	New version replaces old version all existing values get copied to new version and deleted questions or sections will be deleted	New version replaces old version and remains closed for a Denied supplier
<b>Teams changes</b>	Team update gets added to all eligible projects in invited status	Team update gets added to all eligible projects in Registered status	Team update gets added to all eligible projects in denied status
<b>Approval workflow changes</b>	Approval workflow changes take effect on eligible projects in invited status	Approval workflow changes take effect on eligible projects in internal questionnaires. For external questionnaires only the Update Phase.	Not applicable for external questionnaires
<b>Task changes</b>	Task changes take effect on eligible projects in invited status	Task changes take effect on eligible projects in internal questionnaires. For external questionnaires only the Update Phase.	Not applicable for external questionnaires

# Template Upgrade > Find Projects

The screenshot displays the 'Template upgrade' section in SAP. On the left is a navigation menu with 'Template upgrade' highlighted. The main area shows 'Project template: Supplier registration project' and a 'Find projects' button. Below this, it states 'Supplier registration project, latest published version: 91'. A table titled 'Upgrade status' shows project data:

Template type	Template version	Total projects ⓘ	Eligible projects ⓘ	Notify ⓘ	Action
Supplier registration project	2	1	1	<input type="checkbox"/>	Upgrade
Supplier registration project	3	2	2	<input type="checkbox"/>	Upgrade

Three callout boxes provide definitions:

- Total projects ⓘ**: The total number of projects that use a template version.
- Eligible projects ⓘ**: The number of projects that use template version that are eligible for template upgrade. This number might be smaller than the total number of projects using that version, since projects are only eligible for upgrade if they do not have any active tasks.
- Notify ⓘ**: Checking this option sends a notification to the supplier's primary contact to let them know about the upgrade. Use this option for changes in the template that might impact suppliers who are filling out questionnaires. This option does not send notifications to internal users.

# Template Upgrade > Notify & Upgrade

The screenshot shows the 'Template upgrade' interface in SAP ERP Integration. The left sidebar contains navigation options: ERP Integration, ERP integration status, Mass invite, Supplier data, Questionnaires, Inactive Suppliers, Other settings, Feature control, Rename realm, Auto migration, Cancel qualification, and Template upgrade. The main area shows 'Project template: Supplier registration project' with a 'Find projects' button. Below, it states 'Supplier registration project, latest published version: 91'. A modal dialog is open with a warning icon and the following text: '8 of 9 projects will be upgraded to most recent published version 91. You have flagged to send a notification to supplier's primary contact about the new version, Are you sure to upgrade selected template? Click ok to continue.' Below this is a text input field containing 'Please update new section added to the questionnaire under: Corporate Social Responsibility.' and 'Ok' and 'Cancel' buttons. In the background, a table lists projects with 'Notify' checkboxes and 'Upgrade' actions. One project has its 'Notify' checkbox checked.

Click Notify, click upgrade, enter optional message, click OK.  
SLP will then trigger the upgrade and notifications for eligible suppliers.

# Template Upgrade > Track Upgrade Status

The screenshot displays the 'Template upgrade' section in SAP. On the left is a navigation menu with options like 'ERP Integration', 'Mass invite', and 'Template upgrade'. The main area shows the 'Supplier registration project' with a 'Find projects' button. Below this, it indicates the latest published version is 91. There are two tabs: 'Start upgrade' and 'Upgrade status', with the latter being active. A 'Refresh' button is present above a table of upgrade records. A callout box points to the '6 of 6' progress indicator in the table, explaining that all 6 eligible projects were upgraded, but this does not mean all suppliers have responded to notifications.

Project template: Supplier registration project [Find projects](#)

Supplier registration project, latest published version: 91

[Start upgrade](#) [Upgrade status](#)


[Refresh](#)


Project	Version	Version upgraded to	Upgraded on	Notified	Progress	Status	Last update	Errors
Supplier registration project	6	91	Apr 4, 2018, 9:39 PM	Yes		In Progress	Apr 4, 2018, 9:39 PM	
Supplier registration project	7	88	Apr 3, 2018, 3:54 PM	Yes	6 of 6	Completed	Apr 3, 2018, 3:57 PM	
Supplier registration project	86	87	Apr 2, 2018, 5:57 AM	Yes		Completed	Apr 2, 2018, 6:08 AM	<a href="#">Download</a>
Supplier registration project	85	86	Mar 30, 2018, 1:35 AM	Yes	7 of 7	Completed	Mar 30, 2018, 1:38 AM	

This means 6 of the 6 eligible projects got upgraded.  
Note: this is not mean the suppliers have responded to the notification and edited/re-submitted their registration.




# Template Upgrade > Notify Suppliers (default content)

 Tue 4/3/2018 9:24 AM  
Ariba Administrator <s4system-stage@ansmtp.lab1.ariba.com>  
Canonical Realm: s4All has updated a questionnaire and requires your attention

o  upg71 upg71

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**SAP Ariba** 

You are being notified of a change done to Supplier registration questionnaire from Canonical Realm: s4All and requires your attention to review or update the questionnaire.

Details:  
The questionnaire event is updated. Kindly update the responses.

-Supplier Administrator

[Click Here](#) to login to your Ariba account and access Supplier registration questionnaire.

Ariba, Inc. 3420 Hillview Ave, Palo Alto, CA 94304, USA  
[Data Policy](#) | [Contact Us](#) | [Customer Support](#)

# Template Upgrade > Project Email Templates > Customize Email Content

Note: customization of email content is in the Sourcing (S4) Administration console – not in SM Administration.

## Edit Message

[Save](#) [Cancel](#)

Change the subject and content of the Email Template (if desired). Click Save to save the changes or Cancel out of the page without saving the changes. [More](#)

Notification: **Organization:** Sent to supplier primary user when a template upgrade requires suppliers to review/update questionnaire

Project Type: \*

Subject: \*

[Add Email Template Token](#)

Translations

Content:

**B** *I* U

You are being notified of a change done to [Title] from [SYSTEM\_CORPORATE\_NAME] and requires your attention to review or update the questionnaire.

Details:  
[TEMPLATE\_UPGRADE\_NOTE]

[SITE\_URL] to login to your Ariba account and access [Title].