SAP Ariba

Feature at a Glance
Modular Supplier Management Questionnaire

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SAP Run Simple

Feature at a Glance
Introducing: **Modular Supplier Management Questionnaire**

Customer challenge

Current registration questionnaires typically contain a large number of questions about a variety of subjects, often requiring conditions to control visibility and other behaviors tailored to specific category or regional needs. Furthermore there is currently no ability to send additional questionnaires outside of a typical registration or qualification process, and no easy way to mass send questionnaires to one or more suppliers.

Meet that challenge with
SAP Ariba

This feature introduces a new type of supplier management questionnaire for collecting information from suppliers in modular units, providing buyers flexibility to create standalone questionnaires that can be applied for multiple categories, regions, and business units.

Additionally, Modular Supplier Management Questionnaires can have their own status, approval flow, update process, and expiration

Experience key benefits

Improves efficiency for buyers to configure, organize, and send questionnaires to targeted audiences or needs based on categories, regions, or business units. Allows buyers to automatically send notifications to suppliers when a questionnaire response is expiring. This results in better data collection as suppliers can update their open questionnaires at any time, with improved compliance as each modular questionnaire can have its own approval flow.

Solution area

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

Implementation information

This feature is off by default. To enable this feature, please submit a Service Request for feature SM-6130 "Questionnaire Management".

Prerequisites and Limitations

In this first release modular questionnaire is available for supplier facing (or external) questionnaires only.

Modular Supplier Management Questionnaire

❖ Capabilities

❖ Configuration

❖ Buyer User Flow

❖ Supplier User Flow

❖ Approver User Flow

Modular Questionnaire Capabilities

❖ This feature introduces a new type of supplier management questionnaire for collecting information from suppliers in modular units. Unlike registration questionnaires, which typically contain a large number of questions about a variety of subjects, modular questionnaires are designed to include smaller sets of related questions about specific subjects, and to store that information independently from specific supplier management processes.

❖ Modular questionnaires have their own:
  ❖ Status (Not started, Pending Submission, Pending Approval, Pending Resubmit, Approved, Denied, Expiring, Expired)
  ❖ Approval Flow (for both New and Update processes)
  ❖ Update capabilities via open vs. closed questionnaires
  ❖ Configurable expiration date and expiration notifications

❖ Supplier 360 provides a central location to view all all questionnaires applicable for a given supplier

❖ Ability to send a questionnaire to one or more suppliers outside of any lifecycle process

Modular Supplier Management Questionnaire

- ❖ Capabilities

- ❖ Configuration

- ❖ Buyer User Flow

- ❖ Supplier User Flow

- ❖ Approver User Flow

Configuring Modular Questionnaire
Step 1 – Upload Questionnaire Types

❖ In Administration >> Data Import/Export, upload the SMQuestionnaireType.csv file. This file simply contains Unique Name, Name, and Description. Unique Name and Name are mandatory. Examples of questionnaire types could be Compliance, General, Finance, Quality, etc.

Configuring Modular Questionnaire
Step 2 – Create Modular Questionnaire template

1. Manage >> Templates
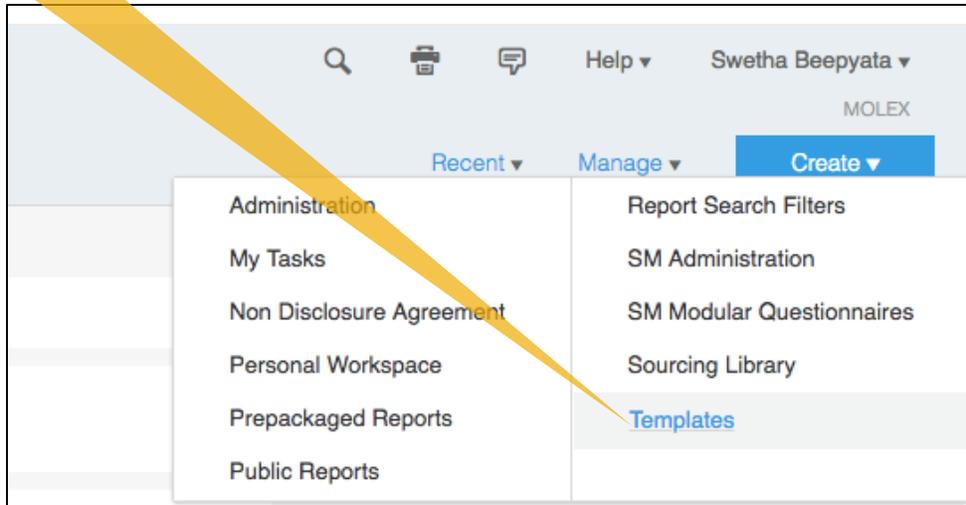
2. Actions >> Create >> Templates
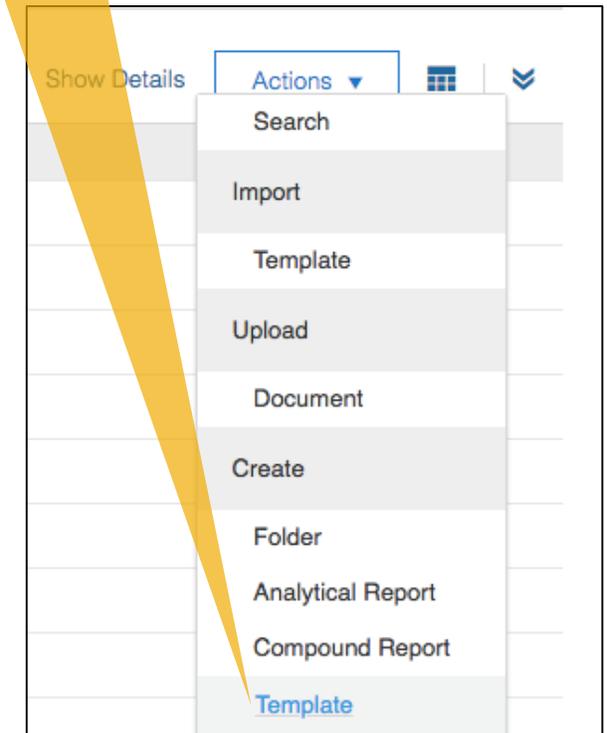
Configuring Modular Questionnaire
Step 2 – Create Modular questionnaire template cont'd

Select Project Type for Template

OK   Cancel

A Template is used to create a specific type of project. To create a new Template, choose the type of project you want to eventually create from the Template.

What type of Project will be created from this template?

○ Knowledge Project
○ SM Process Project
● SM Modular Questionnaire
○ Sourcing Project
○ Sourcing Request

Choose "SM Modular Questionnaire" project type

Title: * Finance stability   Translations ⓘ

Description: B I U — size — — font — A

Name the template

Translations

Configuring Modular Questionnaire
Step 2 – Create Modular questionnaire template cont'd

Finance Stability
SM Modular Questionnaire

Status: Draft
Version: Original

Exit

Overview | Documents | Tasks | Team | Conditions | Advanced Options | History

Properties

Actions ▾ Suggested steps for template editing

Name: Finance Stability ⓘ
Description: ⓘ
ID: WS8661713 ⓘ
Owner: Swetha Beepyata ⓘ
Base Language: English
Rank: 0
Questionnaire Type: (no value)
Commodity: (no value)
Regions: (no value)
Departments: (no value)

1. Add project groups on the **Team** tab.
2. Add phases and milestones on the **Tasks** tab.
3. Add folders and documents on the **Documents** tab.
4. Add document tasks, such as reviews, to documents as you
5. Add "Todo" tasks from the **Tasks** tab.
6. Add conditions and questions on the **Conditions** tab.
7. Specify conditions for documents and tasks.
8. Click **Exit** to save your changes and exit.

Modular Questionnaire template now created for Finance Stability

In Actions, select "Edit Properties" to specify Questionnaire Type, applicable Categories, Regions, and Business Units.

Finance Stability
SM Modular Questionnaire

Overview | Documents | Tasks | Team | Conditions | Advanced Options | H

Properties

Actions ▾ Suggested

Template
Name: Finance Stability ⓘ   View Details
Description: ⓘ   View History
ID: WS8661713 ⓘ   Edit Properties
Owner: Swetha Beepyata ⓘ   Publish
Base Language: English   Revert
Rank: 0   Export Template
Questionnaire Type: (no value)
Commodity: (no value)   Display
Regions: (no value)
Departments: (no value)   Compact View

Configuring Modular Questionnaire
Step 3 – Assign Questionnaire Type, Categories, Regions, and Business Units

If a questionnaire is applicable to *any* of the categories, regions, or business units, please select ALL. For example, a general questionnaire would be valid for all categories, regions, and business units. Otherwise select specific values that properly define where this questionnaire is applicable.

Configuring Modular Questionnaire
Step 4 – Add a survey document within modular questionnaire template

In the Documents tab within the template, Click on Actions >> Create Survey. NOTE **we do not support any other document type** in the Modular Questionnaire.

Name the questionnaire: Note this will be the name that will be shown to suppliers. You can repeat the use of the modular questionnaire template name here.

Next you will be navigated to the rules section.

Configuring Modular Questionnaire
Step 5 – Configure SM rules

❖ **Specify questionnaire format** – Form or Questionnaire: if you want to view questionnaires with section and question numbers, choose questionnaire.

❖ **Is questionnaire required?** - Yes means questionnaire is mandatory. No means optional to the supplier.

❖ **Specify questionnaire type** – Must be "External". We currently support only supplier-facing questionnaires for modular questionnaire

❖ **Always Open** – If you select Open, then when questionnaire is approved the recipient of the questionnaire can update it on an as-needed basis. If you want encourage your suppliers to keep their information current, please mark the questionnaire as Open.

❖ **Can Expire?** – If yes, you can configure the expiration schedule (from approved date and when the expiration notification should be sent to the supplier to update their response.

❖ Next step – create the questionnaire content. The content can be configured like any other questionnaire.

Supplier Management

Specify questionnaire format:	Form ⌄ ⓘ
Is questionnaire required?	○ Yes ● No ⓘ
Specify questionnaire type: *	External ⌄
Always open:	● Yes ○ No ⓘ
Can expire?	● Yes ○ No ⓘ
Expiration schedule:	Expires every 1 year(s) ⌄
	Send reminder 6 month(s) ⌄ before expiration
	☑ Notify primary supplier manager
	☐ Notify project owners

Configuring Modular Questionnaire
Step 6 – Configure approval tasks

❖ We support two kinds of approval process

➢ New Phase – If a recipient (of the questionnaire) submits the questionnaire for the first time, the approval goes through the New approval process

➢ Update phase – Once the questionnaire is approved, if a recipient updates the response either because the questionnaire is open or the questionnaire is expiring/expired, or someone has requested an update, then the questionnaire goes through the Update approval process

Note: In the tasks we support only To Do task and Approval task. The other tasks such as Review, Notification are not supported in SLP.

Modular Questionnaire Status Definitions

- ❖ Not started – when a questionnaire is sent to the recipient but the recipient has not started answering the questionnaire

- ❖ Pending submission – when the recipient has started answering the questionnaire but has not yet submitted

- ❖ Pending approval – when the recipient has submitted the questionnaire but the questionnaire is still in approval

- ❖ Pending resubmit – when the approver has requested additional info from the recipient and is waiting for the recipient to update and resubmit the questionnaire

- ❖ Approved – when the questionnaire is fully approved

- ❖ Denied – when the questionnaire is denied

- ❖ Expiring – when the expiring notification triggered on the questionnaire (based on the configuration in modular questionnaire rules)

- ❖ Expired – when the expiration date is current or past

Modular Supplier Management Questionnaire

❖ Capabilities

❖ Configuration

❖ Buyer User Flow

❖ Supplier User Flow

❖ Approver User Flow

Buyer User Flow
Step 1 – Select modular questionnaire(s)

❖ To send modular supplier management questionnaires, the user must be a member of the "SM Modular Questionnaire Manager" group.
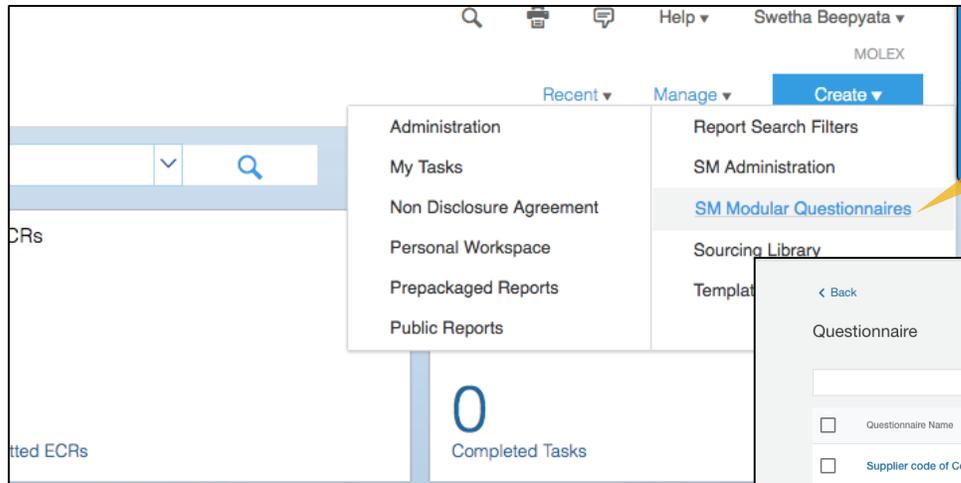
Select Manage >> SM Modular Questionnaires

View list of all active questionnaires. Select one or more to send.

Search by name

Buyer User Flow
Step 2 – Select one or more suppliers

Select supplier(s) to whom you want to send the questionnaire(s). You can select more than one supplier.

You can search by supplier name or apply the standard search filters of category, region, registration status, etc. You can also filter by saved search (if you have any saved search criteria defined in the supplier search page).

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Buyer User Flow
Step 3 – Confirm or add supplier contact (if missing)

❖ Only those suppliers who have at least one supplier contact will be shown

❖ If you want to choose a different supplier user, you can click on Change contact. Only one user can be selected.

❖ NOTE: we only support **supplier facing questionnaires**.

Modular Supplier Management Questionnaire

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❖ Approver User Flow

Supplier User Flow
Step 1 – Receives email to submit questionnaire

❖ Supplier receives an email to complete a questionnaire

❖ Supplier logs in to Ariba Network and selects a Questionnaire from the Questionnaires section

Action needed: Complete questionnaire from MOLEX

Swetha Beepyata <s4system-mach+MOLEX.Doc8675905@ansmtp.lab1.ariba.com>
● Beepyata, Swetha
Wednesday, April 11, 2018 at 6:09 AM
Show Details

Ariba Logo

Hello Swetha Beepyata,

MOLEX has invited you to complete a questionnaire. This is required so Kelly technologies can do business with MOLEX.

Questionnaire Overview
Questionnaire name: Finance stability
Respond by: Sun, 10 Jun, 2018

Submit questionnaire

Best,

SAP Ariba team

MOLEX sourcing site, Event Doc8675905: Finance stability, Realm: MOLEX, Message Id: MSG98866, Submit questionnaire

Ariba, Inc. 3420 Hillview Ave, Palo Alto, CA 94304, USA
Data Policy | Contact Us | Customer Support

Questionnaires

Title	ID	End Time ↓	Commodity	Regions	Status
▶ Status: Completed (1)					
▼ Status: Open (1)					
Finance stability	Doc8675905	6/10/2018 6:09 AM	All Commodities All	All All	Not Responded

Supplier User Flow
Step 2 – Respond to questionnaire

❖ Supplier answers the Modular Questionnaire

Modular Supplier Management Questionnaire

❖ Capabilities

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❖ Supplier User Flow

❖ Approver User Flow

Approver User Flow
Approve the task
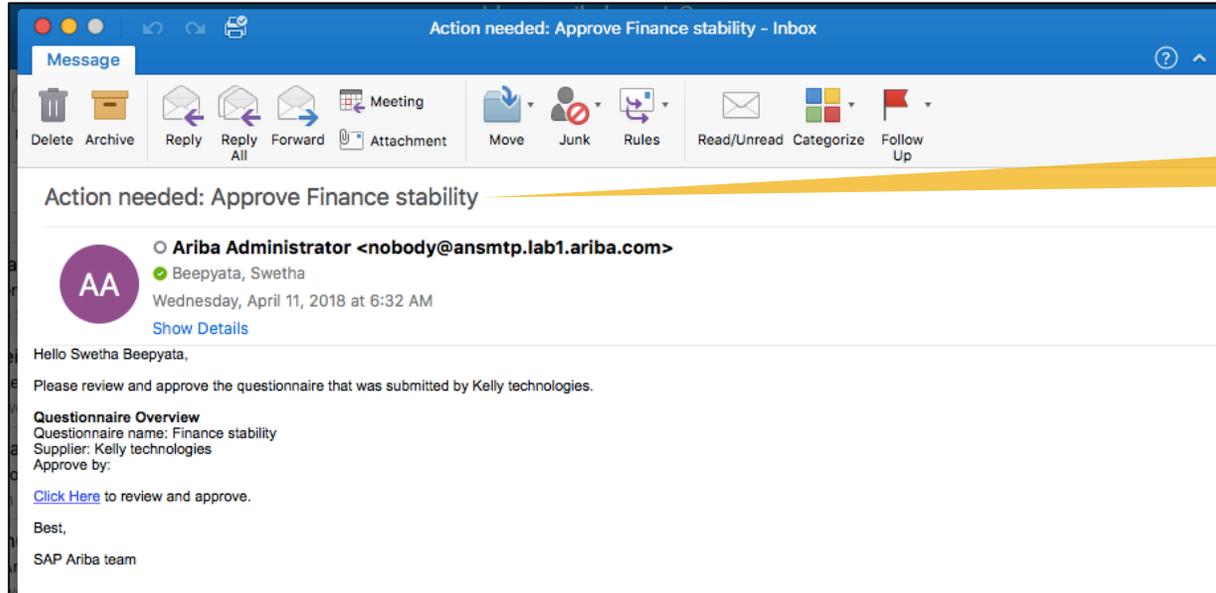
Approver receives an email to approve the response submitted by the supplier

Approver can approve, reject, or request additional information from the supplier

Supplier 360
View all modular questionnaires in one place

❖ The buyer can see the list of all Modular Questionnaires for a given supplier in Supplier 360