



SAP Ariba 

Feature at a Glance

Periodic reviews of engagements

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Feature at a Glance

Introducing: Periodic reviews of engagements

Ease of implementation  High touch
Geographic relevance  Global

Customer challenge

- Engagement request details need to be reviewed and attested frequently, to ensure the buyer-supplier relationship is correctly documented, and so that audit requirements are fulfilled
- Users cannot keep track of the frequency at which the engagements should be reviewed, because frequency of review depends on inherent and residual risk ratings
- Records must be maintained for all reviews for audit purposes

Solution area

SAP Ariba Supplier Risk

Meet that challenge with

SAP Ariba

- This feature allows a project owner to review the engagement and attest to the request details when the review becomes due
- The user can choose to update the details and attest that the changes are complete; additional due diligence may be required if changes are significant or require approval
- All activities are tracked under the Engagement History page, where detailed snapshots are also available
- Review frequency and related settings can be configured in SR Administration

Implementation information

This feature is ready for immediate use for all customers with the applicable solutions but requires **customer configuration**.

Experience key benefits

- An authorized user can now use a periodic (or ad-hoc) review to go over and/or update the engagement request and provide attestation
- Additional due diligence, if any required, will be triggered and assigned to the appropriate owners for action
- Reviews can be edited or canceled; a periodic review requires completion, or a governance analyst user to skip it
- Final version of the review is audited in engagement history, along with request and task details

Prerequisites and Restrictions

- Control-based supplier engagement risk assessment and issue projects must be enabled in your site
- Change request must be configured

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How to configure periodic reviews of engagements

1 – Navigate to Supplier risk administration > Configure periodic reviews

2 – On Engagements tab, click on the Edit button

3 – Specify default, and conditional review period lengths

4 – Specify what happens when the first review period ends, and when the next review should start

5 – Specify the duration to start and complete a review

6 – Enable this setting if you want to trigger PR-specific phase when n-consecutive reviews are submitted without changes

The screenshot shows the 'Configure periodic reviews' interface. The left sidebar contains a navigation menu with 'Supplier risk administration' and 'Configure periodic reviews' highlighted. The main area is titled 'Configure periodic reviews' and has two tabs: 'Engagements' (selected) and 'Control review'. Below the tabs, there's a section for 'Periodic review for engagements' with a 'Review period length, in months' dropdown set to 12. A table below shows conditional review periods for different risk levels:

Inherent risk	Residual risk	Review period length, in months
High	VERY HIGH	20
Medium	MEDIUM	30
Low	LOW	40

Below the table, there's a section for 'Review period end date is:' with radio buttons for 'Date to complete the review' (selected), 'Date to start the review', 'Engagement completion date', 'Milestone date', 'Last periodic review expected completion date', and 'Last periodic review actual completion date'. There's also a 'Duration to complete the review, in days' dropdown set to 45, a 'Require additional periodic review activities phase' toggle (checked), and an 'After how many consecutive reviews without changes' dropdown set to 3. Buttons for 'View an example', 'Cancel', and 'Save changes' are at the top right.

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How to configure periodic reviews of engagements

The screenshot shows a configuration panel titled "Email notifications" with several settings:

- Notify when periodic review is available:
- Recurring notification: ⓘ
- Notification recurrence, in days: 5 (with up/down arrows)
- Send reminder to complete periodic review:
- Recurring notification: ⓘ
- Notify when periodic review is canceled:
- Notify when periodic review is skipped:
- Notify when periodic review is completed:

7 – Select email notifications that need to be sent out. For recurring notifications, specify a frequency

8 – After configuration is complete, enable the parameter for periodic review background processing

9 – Every ER completed **after** the parameter is enabled, will automatically have periodic review schedule assigned and available on the ER detail page (see later slides)

10- Any ER that was completed **before** the parameter is enabled, will need to go through migration (see next slide)

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How to generate PR dates for previously completed engagements and enable them to be reviewed

1 – Click on Select engagements link **after** saving the configuration options

2 – Select all, or some engagements for which to generate PR dates

3 – Confirm this action, and wait for processing to complete before expecting PR dates on ER details page

4 – Only engagements that are completed or undergoing a change request are eligible
5 – If you select such an ER, PR dates will be assigned when CR is completed/canceled

Review dates for previously completed engagements

Generate periodic review dates for older engagements: [Select engagements](#)

Generate periodic review dates for selected engagements

Select the engagements for which you want to generate periodic review dates. An engagement currently undergoing change request will have its periodic review dates generated after the change request ends and the engagement returns to Completed status.

Select engagements

ID	Engagement title	Status
<input checked="" type="checkbox"/>	WS12518742 yh 0611 11513	
<input type="checkbox"/>	WS12579076 yh 0615 11355 13	
<input type="checkbox"/>	WS12584030 yh 0515 123	
<input type="checkbox"/>	WS10126814 TESTRK0305	
<input checked="" type="checkbox"/>	WS8228198 yh 8689 test	
<input type="checkbox"/>	WS8203186 Supplier Risk Engagement Project Template	
<input type="checkbox"/>	WS7659643 yh 1210 Requested2-CR-Submitted 1	Change Request: Trigger Evidence and Control Process Phase - In Progress
<input checked="" type="checkbox"/>	WS7258312 Rad03_Nov18	Completed - basic due diligence only
<input type="checkbox"/>	WS7254046 Rad02_Nov18	Completed - basic due diligence only
<input type="checkbox"/>	WS6981683 191104_nonRisk_TogONParamOFF	Completed

Engagements selected: 5

Confirm: Generate periodic review dates

Engagements selected: 5

Choose Confirm to start generating periodic review dates. The time required to complete this process depends on the number of engagements selected and their statuses.

Go back Cancel Confirm

Engagements selected: 5 Cancel Continue

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How to review an engagement

1 – View the schedule on the ER details page, format: Expected start date – Expected end date

2 – Click Start review in the Actions menu

3 – Go through the wizard, and make changes if needed (similar to CR); click on Submit Review on 4th step

4 – Check both boxes in the pop-up to attest to the presence/absence of changes, then click Submit

5 – Governance analyst ONLY can skip a review using the Skip review action menu item. Reason must be provided

6 – All reviews can be tracked under Engagement History

7 – Outside of the review window, users can submit Ad-hoc reviews. Attestations are required

8 – Related actions for periodic review are available in the Action Queue