SAP Ariba /\\

Feature at a Glance
Apply template process updates to existing engagement projects

Chris Del Frate, SAP Ariba
Target GA: November 2021

THE BEST RUN **SAP**

Feature at a Glance

Introducing: **Apply template process updates to existing engagement projects**

Customer challenge

Currently Risk administrative users can make modifications to engagement request templates in accordance with policy changes in their organization. However, these changes cannot be pushed to existing engagement requests.

This means certain ongoing engagements do not reflect the most up to date policies and engagement owners cannot complete additional or new due diligence that the organization deems necessary at that point in time.

Meet that challenge with

SAP Ariba

This feature adds support for upgrading existing engagement projects to the latest version of the **Supplier Risk Engagement Template** so they can include your organization's most recent risk processes.

Experience key benefits

Enable ongoing engagement requests to be upgraded to the latest template

Better identify risks in existing engagements

Remain compliant with changing regulatory requirements

Provide end users change request and periodic review capabilities on existing engagements.

Solution area

SAP Ariba Supplier Risk

Implementation information

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

Prerequisites and Restrictions

Control-based engagement risk assessment projects must be enabled in your site.

See documentation for full discussion of template upgrade restrictions and recommendations.

Feature at a Glance
Overview: **Apply template process updates to existing engagement projects**

Administrators make engagement projects available for upgrade and project owners complete the upgrades for individual projects by an optional, configurable due date. Depending on the changes an upgrade introduces to a project, it can result in opening the project for **edit** or initiating a **change request**.

Template upgrade always upgrades projects directly to the **current published version** of the template. You cannot upgrade to an intermediate template version.

The template upgrade operation automatically creates **new projects** and copies the data from the previous projects. The previous projects are then **archived**. The original project and each upgraded project all have unique IDs, but upgraded projects are **linked** to their previous projects.

You can **view** the engagement projects that were selected for upgrade to the latest template version and their upgrade status on the **View status** tab (click **Manage upgrades** in the **Supplier risk administration** page).

After the engagement is completed, you can **compare** the template versions and view the specific details about which elements of the project were modified during the upgrade on the **Engagement History** page (click **View history** in the **Engagement Summary** section of the engagement page).

Feature at a Glance

Process: **Apply template process updates to existing engagement projects**

1. Prepare your template for upgrade if you're making changes to survey questions on a new template version and you want the question answers from the older template version to move to the new template version. If you are not making changes to survey questions on a new template version, skip this step.

2. Make the engagement projects available for template upgrade.

3. Upgrade the engagement project to the latest template version.
   - Edit flow (the engagement project was in progress before the upgrade):
     - Pending > In progress > Pending edit > Completed
   - Change request flow (the engagement was completed before the upgrade):
     - Pending > In progress > Pending change request > Template upgrade submitted > Completed

4. Check the status of the engagement projects you selected for upgrade.

Feature at a Glance
Preparation: **Apply template process updates to existing engagement projects**

Supplier risk administration

- Reports
- Configure risk exposure
- Import data
- Configure alerts
- Customize supplier alerts
- Engagement processing error report
- Content and service providers
- Adverse media feedback center
- **Preparation for template upgrade**
- Manage upgrades
- Configure periodic reviews
- Control effectiveness options

Preparation for template upgrade

Step 1: Select an older template version to prepare for template upgrade.

Latest template version available: v375

Select an older template to review matched fields: v4 ▾

Step 2: Download the file that included the survey questions and the recommended matches.

File includes:
- Recommended matches
- *Source unmatched:* matching question missing in the older template version
- *Target unmatched:* matching question missing in the older template version
- Manually matched questions (if a manual match was applied previously to this template version combination)

↓ Download
   v375_v4_unmatched_fields.csv

Step 3: Review the columns for source and target correlation IDs, and the matched result column. If you want to make changes, make them in the Target Correlation ID column. This will allow data to be preserved from the older template version into the new template version after template upgrade. If you leave the Target Correlation ID column empty, the data from the older template version will not be preserved in the new template after template upgrade.

After making changes, save the file to your desktop.

Step 4: Upload the file saved in Step 3 with the updates to the Target Correlation ID column. Click **Check validity** to check your matches for any errors.

Upload file
↑ [   ] [Browse] [Check validity]

1. Choose the version of the template you want to prepare for upgrade
2. Download the file with survey questions and recommended question matches
3. Review the file offline and adjust matches (please refer to documentation)
4. Upload file, check validity, resolve any errors, and publish.

Feature at a Glance
Make Projects Available for Template Update

1. On **Manage Upgrade > Select engagements** tab, multi-select the engagements you want to upgrade to the latest template

2. After clicking Continue, define additional settings for template upgrade in the popup such as notification settings and message, reminder settings, and due date settings

Feature at a Glance
View status: **Apply template process updates to existing engagement projects**

The **View status** tab shows the engagement projects that were selected for upgrade to the latest template version and their upgrade status.

Completed means the project owner finished everything and the template upgrade process is done.

- If the engagement project was in progress for an edit before the upgrade, it's in progress again after the upgrade.

- If the engagement project was completed before the upgrade, the change request following the upgrade has been completed and the engagement project is back in completed status after the upgrade.

- **Failed** means the engagement project failed to upgrade to the latest template.

- **In Progress** means the background processing is in progress.

- **Pending** means the project owner needs to upgrade their engagement project.

- **Pending Change Request** means the project owner updated their engagement project to the latest template but hasn't completed the change request that was opened after the template upgrade.

- **Pending Edit** means the project owner updated their engagement project to the latest template but hasn't completed the edit that was opened after the template upgrade.

- **Template Upgrade Submitted** means the upgrade processing has completed and the change request has been submitted.

SAP Ariba /\\

Follow us

www.sap.com/contactsap

THE BEST RUN **SAP**