



SAP Ariba 

Feature at a Glance

Support for workflows with internal forms in modular questionnaire projects

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Feature at a Glance

Ease of implementation  High Touch
Geographic relevance  Global

Introducing: Support for workflows with internal forms in modular questionnaire projects

Customer challenge

SLP Modular Questionnaires currently do not support Internal Forms and To-Do tasks. As a result, conditional and sequential data collection within an modular questionnaire is not possible, and work flows and assessments cannot be triggered based on values collected from a previous form or document.

Meet that challenge with SAP Ariba

This feature adds support for workflows that include one or more internal forms and To-Do tasks in addition to the key questionnaire in both internal and external modular questionnaire projects.

You can use these internal forms and associated To-Do and approval tasks to create questionnaire workflows that not only collect information from the main questionnaire recipient but also allow internal stakeholders to provide supplementary information or analysis, or affirm actions performed in other systems.

Experience key benefits

- Paves a broader path for process framework adoption by enabling customers to configure sequential and conditional questionnaires and workflows as they had done before with legacy qualification.
- Standalone modular questionnaire projects also benefit from this added configuration capability.

Solution area

SAP Ariba Supplier Lifecycle and Performance (SLP)
SAP Ariba Supplier Risk
SAP Ariba Strategic Sourcing Suite

Implementation information

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

- **Enable internal forms in modular questionnaires in Intelligent Configuration Manager.** To perform this, membership in the **Customer Administrator** group is needed.
- **Application.SM.MQ.EnableInternalFormsinModularQuestionnaires in SM Administration Configuration Parameters,** To perform this, membership in the **Ops Administrator** group is needed.

Prerequisites and Restrictions

Please refer to the detailed slides for prerequisites & restrictions

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Prerequisites

- To create and edit modular questionnaire project templates, you must be a member of both the **Template Creator** and **SM Modular Questionnaire Manager** groups.
- To edit an internal form in an modular questionnaire project, you must be either the project owner or the owner of an active 'To-Do' task on that form.
- **Stand-alone external** modular questionnaire projects are supported, whereas **stand-alone internal** modular questionnaire projects are not supported.
- **Internal** modular questionnaire projects **are only supported** in the following scenarios:
 - In SAP Ariba Supplier Lifecycle and Performance sites where the process project feature (SM-16798) is enabled. In this case, internal modular questionnaires are supported in process projects.
 - In SAP Ariba Supplier Risk sites that use control-based engagement risk assessment projects. In this case, internal modular questionnaires are supported as risk assessments.

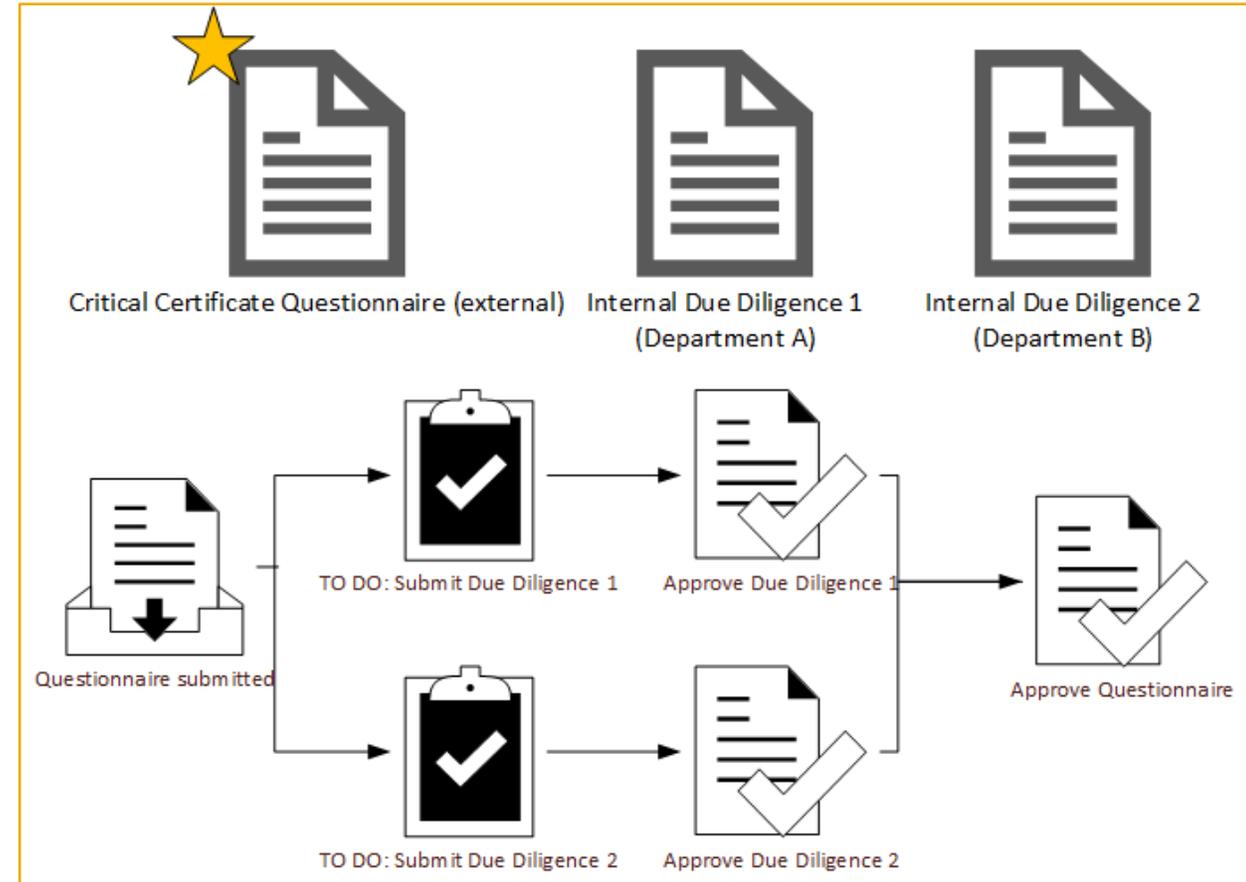
Restrictions

- Certificate management features are not supported in internal forms in a modular questionnaire project.
 - Do not show in the Supplier 360
 - Cannot be used to filter supplier searches
 - Do not generate notifications or trigger expiration of the associated modular questionnaire project
- Always collect certificate information using **Certificate** questions or certificate sections in the key questionnaire in the project.
- Internal forms within modular questionnaire projects do not display on the **Questionnaires** tab of the supplier 360° profile.
 - To access the internal form open the modular questionnaire project details page or view a task associated with the form.
- Additional forms cannot of type 'External'. Only the main questionnaire can be external.

Feature at a Glance

Example Configurations

- As an example, you can configure an internal audit that has several different components, where different task owners can complete forms related to the audit in the same internal modular questionnaire project.
- Another example is that you can have an external questionnaire asking a supplier to provide certain information, and include internal forms in the project so that internal task owners can provide analysis or ratings of that information.
- In both cases, the key questionnaire recipient completes the key questionnaire, and approvers can approve or deny the questionnaire project based on the combined information from the forms and the questionnaire.



Feature at a Glance

Enabling Internal Forms

1. The **Allow multiple internal forms** setting on the **Overview** tab of the modular questionnaire project template determines if the project can include one or more internal forms
2. The **Questionnaire** format specifies that the survey document is the key questionnaire in the project.
 - You can add only **one** survey document with the **Questionnaire** format to a modular questionnaire project template.
 - The key questionnaire performs the following functions:
 - Defines all of the characteristics of the questionnaire project, such as whether it can be reused or expire, whether it's an internal or external modular questionnaire, whether it allows updates, and its timing rules. The full set of **Supplier Management** rules is available in the survey document for the key questionnaire.
 - Determines the overall recipient of the questionnaire project.
3. The **Form** questionnaire format specifies that the survey document is part of the modular questionnaire project workflow but doesn't define the characteristics of the project itself and doesn't affect its status.
 - The questionnaire type of **Internal** is **required** for these forms.
 - You can add **multiple** survey documents with the **Form** questionnaire format and the **Internal** questionnaire type to a modular questionnaire project template that allows internal forms.

The screenshot shows the 'SM Modular Questionnaire' interface with the 'Overview' tab selected. The 'Properties' section is visible, listing various settings. A callout box highlights the 'Allow multiple internal forms' setting, which is currently set to 'Yes'. A callout bubble points to this setting with the text: 'Choose Yes to allow multiple internal forms in the modular questionnaire project.' A large yellow circle with the number '1' is placed over the 'Allow multiple internal forms: Yes' text.

The screenshot shows the 'Supplier Management' settings for a questionnaire format. The 'Specify questionnaire format' dropdown is set to 'Questionnaire'. A callout box highlights this dropdown with the number '2'.

The screenshot shows the 'Supplier Management' settings for a form questionnaire type. The 'Specify questionnaire format' dropdown is set to 'Form' and the 'Specify questionnaire type' dropdown is set to 'Internal'. A callout box highlights these two dropdowns with the number '3'.

Feature at a Glance

Questionnaire Project Details

1. A process flow graph that shows the all tasks in the project workflow, including tasks on both internal forms and on the key questionnaire
2. A **Questionnaires** table that lists all forms and questionnaires in the modular questionnaire project.
 - Viewing a questionnaire or internal form from this table shows the standard questionnaire details page with questions, answers, and version history
 - The **Questionnaires** table does not show scores or score band indicators for questionnaires or forms with scoring. However, scores and score band indicators do show on the individual questionnaire details pages.
 - Questionnaire details pages for internal forms do not include the **Request Update** button, since update requests are only supported for the key questionnaire.
3. A **Tasks** table that lists all tasks associated with forms and questionnaires in the modular questionnaire project

Logistics Questionnaire

Not Responded

SUPPLIER

Supplier ABC

QUESTIONNAIRE TYPE

Modular Questionnaire

LAST UPDATED
Oct 19, 2021

RECIPIENT

Terry Kwan
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OWNER
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MATRIX

Category All>Logistics>Regional Transportation & Storage>Warehousing

Region All Regions>North America>USA

Business unit All>Manufacturing

Process Flow

Questionnaires

| NAME | TYPE |
|-------------------------|----------|
| Logistics questionnaire | External |
| Due Diligence | Internal |
| Compliance Check | Internal |

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Tasks

| NAME | ACTION BY | STATUS |
|--------------------------------------|-----------|-------------|
| To Do for Due Diligence | | Not Started |
| Approval for Due Diligence | | Not Started |
| To Do for Compliance | | Not Started |
| Approval for Compliance | | Not Started |
| Approval for Logistics Questionnaire | | Not Started |

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