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# Supplier Management Project Template Upgrade

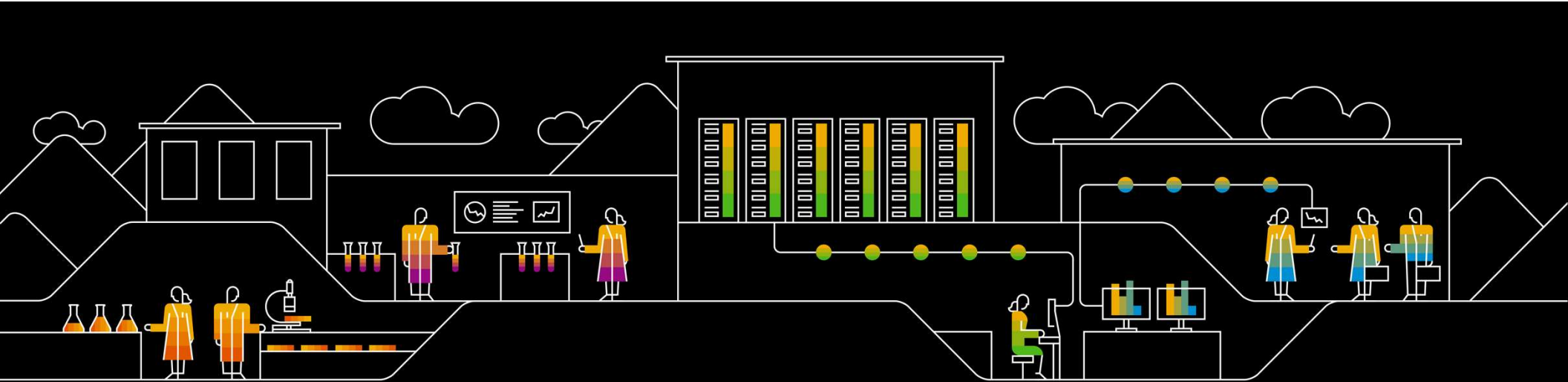
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# Agenda

- Introduction to Template Upgrade
- Eligible Projects for Template Upgrade
- Restrictions/Validation during publishing template
- Steps to Perform Template Upgrade
- Available options during Template Upgrade
- Common Template Upgrade Failures
- Best Practices for Template Upgrade
- References
- Demo



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# Introduction to Template Upgrade and Eligible Projects

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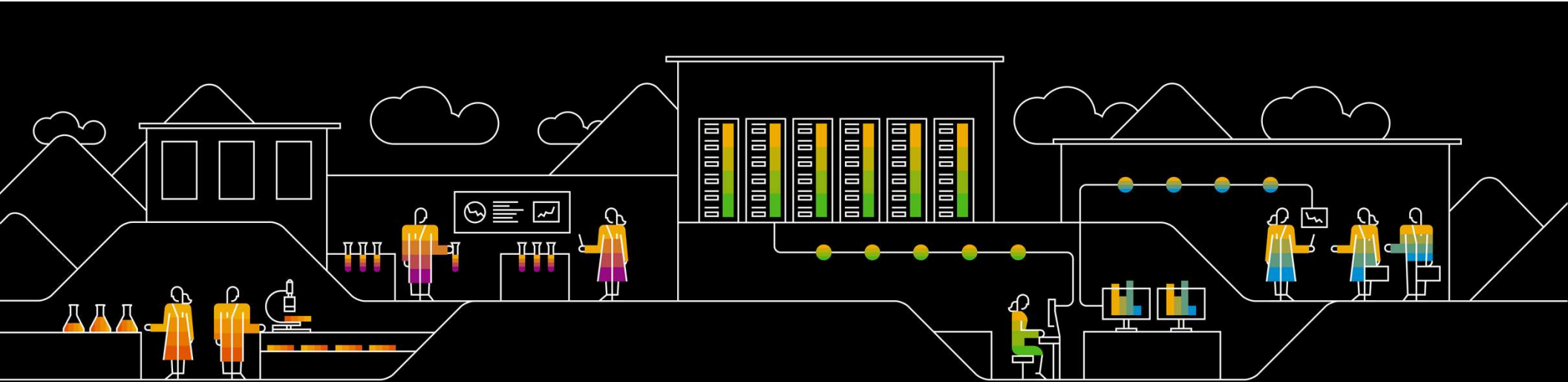
## Introduction to Template Upgrade

- Template upgrade enables you to automatically update existing projects with any changes you have made to the template from which they were created.
- Supplier registration projects and modular questionnaire projects are the only supplier management projects that support template upgrade.
- The template upgrade operation automatically creates new projects and copies the data from the previous projects.
- The History tab of each upgraded logs the template upgrade with an entry labeled Upgraded to a new version of template.
- However, information from previous projects, such as previous questionnaire versions and previous project documents and tasks, is accessible in various places in the supplier 360° profile, questionnaire details pages, and advanced views of the projects

## Eligible Projects for Template Upgrade

Upgrade Eligibility	Registration Status	Modular Questionnaire Status
Always eligible for template upgrade	<ul style="list-style-type: none"> <li>Invited</li> <li>In Registration</li> <li>Denied</li> </ul>	<ul style="list-style-type: none"> <li>Not Responded</li> <li>Denied</li> <li>Expiring</li> <li>Expired</li> </ul>
Never eligible for template upgrade	<ul style="list-style-type: none"> <li>Not Invited</li> <li>Pending Approval</li> <li>Pending Re-submit</li> </ul>	<ul style="list-style-type: none"> <li>Pending Submission</li> <li>Pending Approval</li> </ul>
Eligible for template upgrade only if an update is not in approval	<ul style="list-style-type: none"> <li>Registered</li> </ul>	<ul style="list-style-type: none"> <li>Approved</li> </ul>

Note: Project is never eligible for template upgrade if one of its approval tasks is in approval



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# Restrictions/Validation during publishing template

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## Restrictions/Validation during publishing template

- The feature(Template upgrade validations) introduces a validation system for new supplier registration and modular supplier management questionnaire project template versions to help you avoid unintentionally losing supplier response data during template upgrades.
- These validations include document matching , questionnaire content matching and answer type matching.
- If a new template version does not have matching documents or questionnaire content or answer type matching from the previous version, the validation system flags any discrepancies and notifies before you publish a new template version or perform a template upgrade.
- The feature introduces two new template properties. The **Required content match (%)** property controls the percentage of content between template document versions that must match to publish a new template version. The **Skip pre-publication validation?** property, when set to Yes, allows you to publish new template versions regardless of validation issues.
- The feature also add a new option for user to provide explanation of ignoring the validation warnings and proceeding with template upgrade despite risk of unrecoverable data loss.

# Restrictions/Validation during publishing template

Pre-publication template validation OK Cancel

### Questionnaire Changes Summary

Version 1.347	Version 1.348 (latest draft version)	Questionnaire Type	Supplier Count	Content Matching %	Required Matching %
Internal form 2	Internal form 2	Internal	<Not applicable>	100.0% (2 / 2)	<Not applicable>
Internal	Internal	Internal	<Not applicable>	100.0% (3 / 3)	<Not applicable>
<i>registration questionnaire</i>	<i>registration questionnaire</i>	<i>External</i>	<i>1484</i>	<i>90.91% (10 / 11)</i>	<i>100.0%</i>

### Changed Answer Types

Title	Question Text	KI Id	Previous Answer Type	Current Answer Type
<i>registration questionnaire</i>	<i>Ext address</i>	<i>KI_9849837</i>	<i>Address</i>	<i>Extended Address</i>

*Pre-publication template validation has identified the following issues, which block template publication:*  
*\* External questionnaire registration questionnaire has a content matching % of 90.91, which is below the required matching % of 100, and existing projects for 1,484 suppliers include this questionnaire.*  
*\* The answer type for at least one question has been changed, which will result in data loss after template upgrade.*

Publishing this template with these issues and then upgrading existing projects to it may result in unrecoverable data loss in those existing projects. You have opted to skip pre-publication validation. Click OK to publish the template with these changes.

*\* Enter your explanation for ignoring validation warnings and proceeding with template upgrade despite risk of unrecoverable data loss:*

OK Cancel



# Restrictions/Validation during publishing template

## Document matching validation

- Document matching validates that a new template version has the same questionnaires as the previous template version. If the questionnaires do not match between versions because you deleted one, the system flags the discrepancy.
- The system does not flag new questionnaires as a validation issue. If you set Skip pre-publication validation? to Yes, you can publish the new template version. Otherwise, you must revert your changes from the Overview tab and return the template to the previous version.

## Document content matching validation

- Document content matching validates template documents at the content level. It returns validation results as the percentage of questions that match between document versions.

## Document answer type matching validation

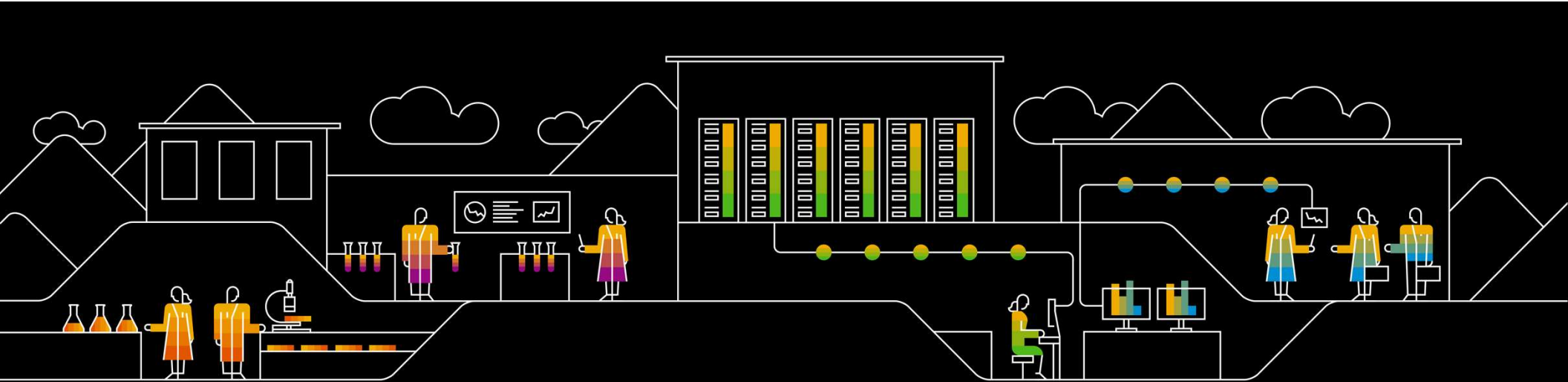
- Document answer type matching validates questionnaire answer type at the content level. It returns validation results as the changed answer types between document versions.

## Restrictions/Validation during publishing template

The screenshot displays the configuration page for a 'Supplier Registration Template'. The 'Name' field is set to 'Supplier Registration Template'. The 'Description' field contains the text 'Use this template to perform supplier registration processes.' Below this, the 'Translations' section is visible. The 'ID' is 'WS176163155', the 'Owner' is 'Customer Support Admin', and the 'Base Language' is 'English'. The 'Rank' is set to '10'. The 'Allowed Commodity Levels' are set to 'From: ' and 'To: '. The 'Required content match (%)' is set to '100'. The 'Skip pre-publication validation?' is set to 'No'. The 'Access Control' is set to '(No restrictions - Accessible to all users)'. The 'Conditions' are set to '(none)'. There are also 'View Details' and 'Translations' links.

**Required Content match (%)**– This property controls the percentage of content between template document versions that must match to publish a new template version

**Skip pre-publication validation?** - This property, when set to Yes, allows you to publish new template versions regardless of validation issues.



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# Steps to Perform Template Upgrade

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# Steps to Perform Template Upgrade

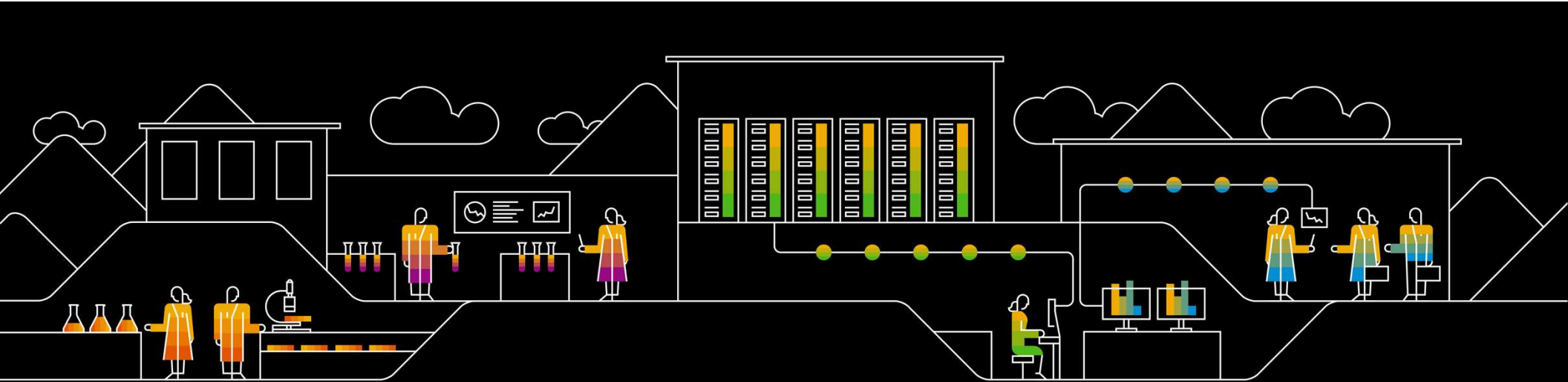
## Prerequisites

To perform a template upgrade the user must be part of the **SM Ops Administration group**.

Template upgrade for supplier registration projects and MQ is available by default.

## Steps to carry out template upgrade:

1. Manage > SM Administration > **Template Upgrade**
2. On the **Project template** dropdown menu, choose the type of the template for the upgrade.
3. If you chose **Modular questionnaire** as the template type, on the **Template title** dropdown menu, choose the name of the modular questionnaire template for the upgrade.
4. If you chose **Supplier registration project** as the template type, on the **Template title** dropdown menu, select the supplier registration template.
5. 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.
6. Check the validation error if exist and proceed Next
7. Check **Notify Supplier contact** (optional) and enter the text message and click **Upgrade**



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# Available Options during Template Upgrade

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## Available Options during Template Upgrade

Start upgrade		Upgrade status				
Template type	Title	Current version	Latest version	Total projects ⓘ	Eligible projects ⓘ	Action
Supplier registration project	Supplier Registration Template	3	873	4	2	<a href="#">Upgrade</a>
Supplier registration project	Supplier Registration Template	6	873	1	0	

**Current Version** – Shows the current version number of template

**Latest Version** – Displays the latest version number of template

**Total Projects** – Total number of projects that uses this template version

**Eligible Projects-** Total number of projects eligible for upgrade and this number will be less than or equal to total number of projects.

# Available Options during Template Upgrade

- When Upgraded, we will be able to see the validation message under **Start Upgrade** tab
- Validation error message will display if there is change in KID(Unique ID for each question generated by system) or change in answer type of the questions or when the entire questionnaire is deleted.
- We can agree by selecting the check box and proceed with above validation errors.

Start upgrade | Upgrade status

Questionnaire changes that affect template upgrade for

Required matching percentage: 100%

Version 1338	Version 1347	Questionnaire type	Supplier count	Content matching %
Internal	Internal	Internal	<Not applicable>	42.86% (3 / 7)
registration questionnaire	registration questionnaire	External	1	60.0% (6 / 10)
<Not Present>	Internal form 2	Internal	<Not applicable>	<Not Applicable>

Template upgrade validation has identified the following issues, which block template upgrade:

- Internal questionnaire Internal has a content matching % of 42.86, which is below the required matching % of 100, and existing projects for -1 suppliers include this questionnaire.
- External questionnaire registration questionnaire has a content matching % of 60, which is below the required matching % of 100, and existing projects for 1 suppliers include this questionnaire.

Upgrading projects with the above issues may result in unrecoverable data loss in those projects. To ignore these issues, select the below checkbox and proceed.

I confirm to proceed with the above validation errors

Previous Next

# Available Options during Template Upgrade

- Select the checkbox to confirm I proceed with validation errors
- New comment box will appear to provide the explanation for ignoring validation warnings and proceeding with upgrade despite risk of unrecoverable data loss

The screenshot shows a dialog box titled "Enter your explanation for ignoring validation warnings and proceeding with template upgrade despite risk of unrecoverable data loss:". The dialog box contains a text input field with a cursor, a warning icon and text: "Explanation of minimum 50 characters for ignoring validation warnings is required.", and "Save" and "Cancel" buttons. In the background, the "Start upgrade" tab is active, showing a table of questionnaire changes and a list of validation issues.

Start upgrade Upgrade status

Questionnaire changes that affect template upgrade for

Required matching

Version 1338	
Internal	
registration question	
<Not Present>	

Enter your explanation for ignoring validation warnings and proceeding with template upgrade despite risk of unrecoverable data loss:

Explanation of minimum 50 characters for ignoring validation warnings is required.

Save Cancel

Template upgrade validation has identified the following issues, which block template upgrade:

- Internal questionnaire Internal has a content matching % of 42.86, which is below the required matching % of 100, and existing projects for -1 suppliers include this questionnaire.
- External questionnaire registration questionnaire has a content matching % of 60, which is below the required matching % of 100, and existing projects for 1 suppliers include this questionnaire.

Upgrading projects with the above issues may result in unrecoverable data loss in those projects. To ignore these issues, select the below checkbox and proceed.

I confirm to proceed with the above validation errors

Previous Next



# Available Options during Template Upgrade

- When there is no change in the KID or answer type of the questions or when there is no change in deletion of the questionnaire then no validation message triggers during template upgrade

The screenshot displays the 'Upgrade status' tab of a template upgrade process. It shows a validation summary for questionnaire changes. The required matching percentage is 100%. The summary table compares Version 881 and Version 883 across different questionnaire types and supplier counts. The validation result is 'no blocking issues', and the 'Next' button is highlighted.

Project template: Supplier registration project ▾

Select a title

Template title: Supplier Registration Template ▾

**Find projects** 🔍

Start upgrade | Upgrade status

Questionnaire changes that affect template upgrade for

Required matching percentage: 100%


Version 881	Version 883	Questionnaire type	Supplier count	Content matching %
Internal	Internal	Internal	<Not applicable>	100.0% (1 / 1)
registration questionnaire	registration questionnaire	External	1	100.0% (5 / 5)

Template upgrade validation has no blocking issues, click Next to proceed.

**Previous** **Next**

## Available Options during Template Upgrade

Start upgrade   Upgrade status



2 of 4 projects will be upgraded from version 3 to the most recent published version 873.  
Are you sure to upgrade selected template? Click on Upgrade to continue or Cancel to return.

Notify supplier's primary contact about the upgrade

Notify is flagged to send a notification to supplier's primary contact about the new version. Enter an optional message to suppliers in the box below.

Questions have been updated

**Notify** – Select the notify which is an optional check box and enter the template upgrade comments which will be sent in the notification email to the suppliers.

# Available Options during Template Upgrade

The screenshot shows a web interface with two tabs: 'Start upgrade' and 'Upgrade status'. The 'Upgrade status' tab is active. At the top left of the content area is a blue 'Refresh' button with a circular arrow icon. Below this is a table with the following columns: 'Upgrade sent on', 'Project', 'Upgrade from', 'Status', 'Progress', 'Failed', and 'Estimated completion'. There are two rows of data. The first row has a right-pointing arrow icon, and the second row has a downward-pointing arrow icon. Below the table, there is a summary section with two columns of text. The left column contains: 'Updated by : YuvarajSap', 'New external questionnaire added : No', 'Validation errors skipped : No', and 'Notified : No'. The right column contains: 'Last updated : Jan 3, 2022, 11:30 AM', 'Rate of upgrade: 249 per hour', and 'Upgraded to : 1339'. To the right of this summary section are two blue links: 'Download summary' and 'View Validation Report'.

Upgrade sent on	Project	Upgrade from	Status	Progress	Failed	Estimated completion
> Jan 23, 2022, 11:58 AM	Supplier Registration Template	13	Completed	1 out of 1	0	Jan 23, 2022, 11:59 AM
∨ Jan 3, 2022, 11:30 AM	Supplier Registration Template	1330	Completed	1 out of 1	0	Jan 3, 2022, 11:30 AM

Updated by : YuvarajSap  
New external questionnaire added : No  
Validation errors skipped : No  
Notified : No

Last updated : Jan 3, 2022, 11:30 AM  
Rate of upgrade: 249 per hour  
Upgraded to : 1339

[Download summary](#)  
[View Validation Report](#)

**Refresh** – Used to refresh the screen to see the updated progress count and time completion

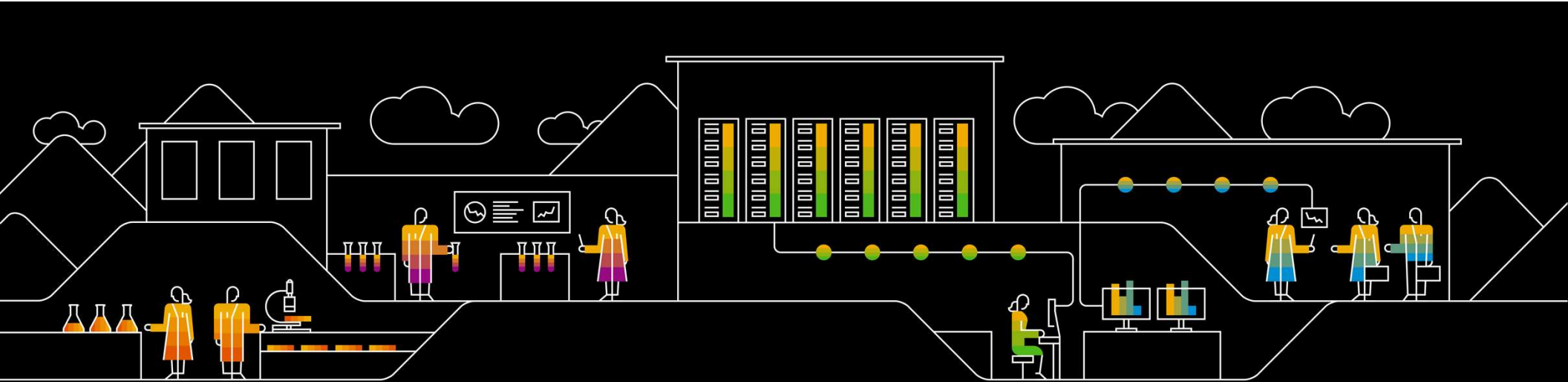
**Upgrade Sent on** – Expand the arrow to see different options like Updated by , New questionnaire added, validation errors skipped ,Notified,Last updated, Rate of Upgrade, Upgraded to

**Status** – Displays the current status of the upgrade. It displays completed or In-progress

**Progress** – Displays how many suppliers have been upgraded so far

**Download Summary**– Can see the successful projects and failed projects along with failure reasons.

**View Validation Report** – Can see the summary of upgrade with Justification details



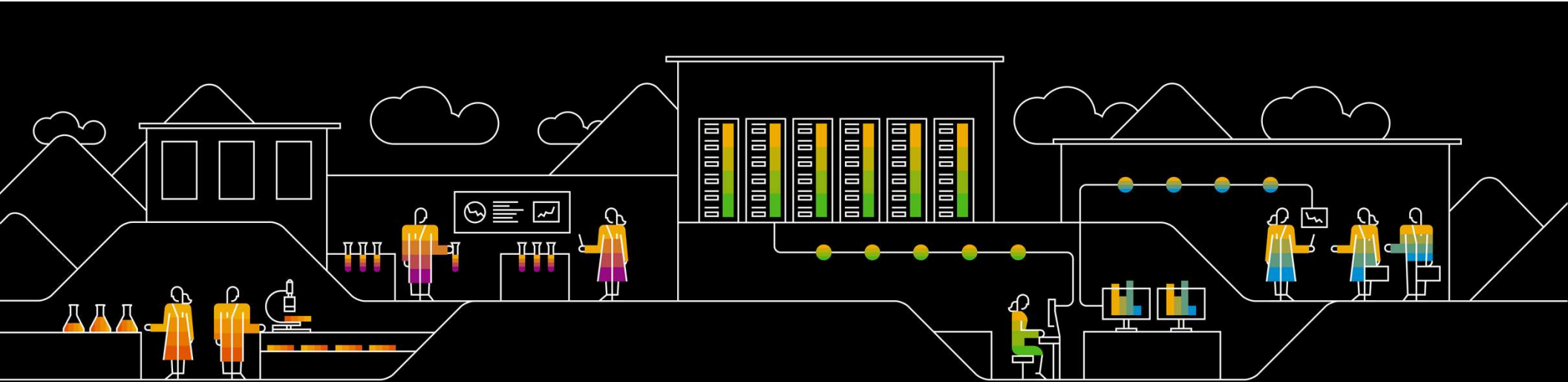
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# Common Template Upgrade failures

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## Common Template Upgrade failures

- **Duplicate Active SMProjects found for the vendor(SM\_ID), it needs a cleanup** - Due to duplicate active Supplier registration projects created in the realm. Customer can raise a case with Ariba.
- **SM update status failed** - Supplier will be active in Sourcing and inactive in SM Side. Make sure suppliers are active at both Sourcing and SM side.
- **No matching external questionnaires, maybe its deleted, check the template** - There will be no document for external registration questionnaire and this is invalid. Template upgrade cannot be performed for such suppliers.
- **Unable to reach MDS or invalid code specified** - This is because the registration projects will be having inactive commodity or region or department. Either remove the invalid code or activate the invalid code and re-run the template upgrade.



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# Best Practices for Template Upgrade

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# Best Practices for Template Upgrade

## Limitations

- Template Upgrade is version based customers can only upgrade suppliers, based on the version the project was built on, to the current published version. It is not possible to select and upgrade only specific projects or suppliers.
- Splitting existing questionnaires into a new questionnaire is not supported by template upgrade.
- When removing a question with supplier field mapping, the answer remains in the supplier management database.
- If a new question is created with the same mapping, the value is not synced from the database as the initial response
- The supplier/internal user needs to provide new answer that overwrites the original one.
- If the reference fields in master data answer type values (region/department/commodity) are deactivated, the upgrade of the projects will fail.

# Best Practices for Template Upgrade

## Validated Scenarios

Action	Comment	Data Loss
Adding Internal Questionnaire	Questionnaire is added. No notification is sent to the owners.	No
Adding External Questionnaire	Questionnaire is added. Notification can be sent out to suppliers. System sends a notification for each external questionnaire separately.	No
Keep Questionnaire Reopened Indefinitely set to Yes	Rule is updated and questionnaire no longer has the due date.	No
Questionnaire is Saved as Draft	The system does retain the initial values or values saved by the respondent.	No
Update of Initial Value for Project Level Mapping	When using a hidden question with initial value used for project level mapping, the value does not get updated and therefore any condition built on it, is no longer matched.	No
Adding Task	Tasks are added, however for the suppliers in registered status, the upgrade impacts the tasks in new phase and update phase.	No
Adding New Approval Node		No
Removing a question		Yes
Adding a question		No



# Best Practices for Template Upgrade

## Answer Type Changes

Action	Comment	Data Loss
Money to Whole Number Whole Number to Money		No
Whole Number to Decimal Number Decimal Number to Whole Number		No
Whole Number to Text (single line limited)		No
Single Select to Multi Select Multi Select to Single Select	The value selected is lost and user needs provide the answer again.	Yes
Date to Text (single line limited)		No
Text (single line limited) to Date		Yes
Yes/No to Text (single line limited) Text to Yes/No	The system treats Yes and No as True or False. If the answer is Yes, it is converted to True as a text. Therefore when the answer is Yes in a text field, the system does not understand the value and puts it incorrectly as No. To avoid this all the answers would need to be True or False in a text field to be properly reflected in a Boolean field. The recommendation is not the change the answer type from Text to Yes/No.	No Yes
Address to Extended Address Extended Address to Address	The value selected is lost and user needs provide the answer again.	Yes

# Best Practices for Template Upgrade

## Question Attribute Changes

Action	Comment	Data Loss
Response Required		No
Remove/Add Reference Document		No
Visible to Participant		No
Participant can add additional comment or attachment	Removing this option does not have impact on the answer, the attachment and comment can still be visible by the customer but supplier no longer has the option to update it.	No
Supplier Field Mapping	Removing supplier field mapping does not remove the value from SM database (ERP profile). Replacing of supplier field mapping with a different value keeps the value for the original mapping and updates the new field mapping with the answer submitted after the upgrade.	No
Removing or Adding Visibility Condition	There are chances that previously answered question may be hidden if the condition satisfied and that wont remove the already entered value from SM database	No

# Best Practices for Template Upgrade

## Recommendations

- **DO NOT** import the template other than while completing the cutover activities to ensure the same KI\_IDs are maintained for all existing projects.
- **DO NOT** remove the question and add same question unless it is needed and aware that data loss is OK.
- **DO NOT** Change the answer type unless needed and aware that data loss is OK
- Before you proceed with the template upgrade, filter the suppliers with Pending Approval status and make sure all the tasks are completed. This is required for the project to be eligible for upgrade.
- NEVER ignore validation errors when publishing a template or during the template upgrade process.
- If there is a question or concern, please seek advise from SAP Ariba
- To avoid any potential performance issues, SAP Ariba recommends to proceed with template upgrades outside of business hours and release days.
- ALWAYS test before you proceed in production!

# References

- Template Upgrade documentation - <https://help.sap.com/viewer/c6163e943b0d48e0885ac73047145cbf/cloud/en-US/7995125252d24f1aa95675d27a83e1b7.html>
- Template Upgrade Validations - <https://help.sap.com/viewer/5f5ea3f13d9c4238a778c2504b669875/cloud/en-US/42cb95e35018428ab951dd9d0f0f569f.html>
- Access to previous questionnaire versions and previous project information after template upgrade - <https://help.sap.com/viewer/2dec32c5e595463db4580020925e544a/cloud/en-US/b8f20c9299004ad698bfde175a10c194.html>
- Enhancements to Template Upgrade - <https://help.sap.com/viewer/2dec32c5e595463db4580020925e544a/cloud/en-US/76e693537cb149d88649fa1da6fe5997.html>
- How to get project details associated to each template version - <https://support.ariba.com/item/view/196756>
- Precautions to be followed before template upgrade - <https://support.ariba.com/item/view/197273>
- Content Index for Template upgrade - <https://support.ariba.com/item/view/200796>
- Content Index for SLP Integration FAQs - <https://support.ariba.com/item/view/198721>

# DEMO

# Thank you.

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