



SAP Ariba 

Feature at a Glance

Modular Supplier Management Questionnaire

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CONFIDENTIAL

 **Run Simple**

Feature at a Glance

Introducing: Modular Supplier Management Questionnaire

Ease of implementation

Low touch / simple

Geographic relevance

Global

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
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- ❖ 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.

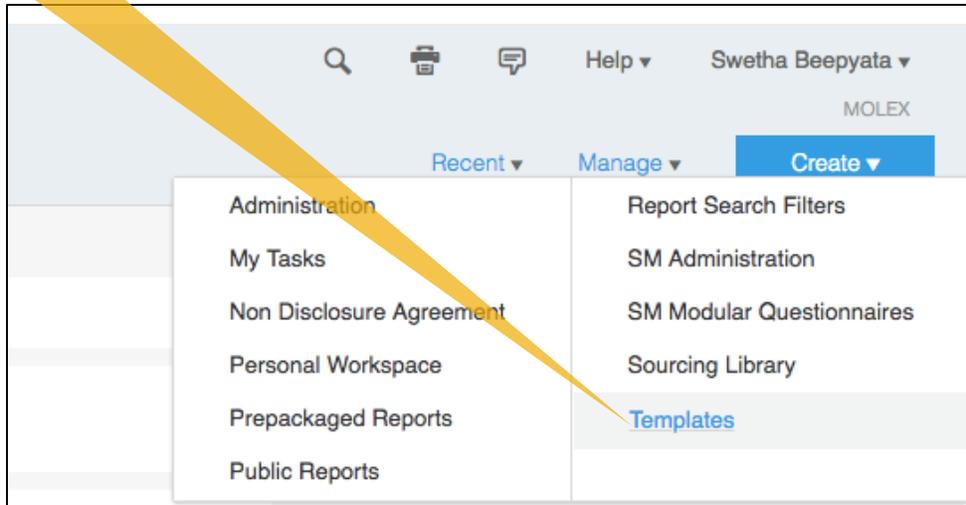
The screenshot shows the SAP Administration 'Data Import/Export' interface. The left sidebar contains navigation menus for Site Manager, Integration Manager, Master Data Manager, Supplier and Customer Manager, and User Manager. The main content area is titled 'Data Import/Export' and includes a search filter for 'Task Name' with 'Search' and 'List All' buttons. Below this, there are tabs for 'Import', 'Export', and 'Web Service Status'. The 'Import' tab is active, showing a table of tasks with columns for 'Tasks', 'Integration Toolkit Names', 'Status', and 'Last Imported'. Two tasks are listed: 'Import Questionnaire Types' and 'Import Translations for Questionnaire Types', both with a status of 'Completed' and 'Import' buttons.

	A	B	C	D
1	UTF-8			
2	Description	Name	UniqueName	
3	Questionnaire	Code of Conduct	COC	
4	Questionnaire	Corporate Responsibility	CR	
5	Compliance	Compliance	Compliance	
6	Questions related to	Environmental Health and Safety	EH	
7	questions for	Finance stability	Finance stability	
8	Common questions	General	General	
9	Kosher related	Kosher	Kosher	
10	Certificate for	MSC Certificate	MSC	
11	For Health and	Occupational Health and Safety Rec	OHSR	
12	Quality related	Quality	Quality	
13	Risk related	Risk	Risk	
14	Supplier Self	Supplier Self Assessment	SA	
15	Related to	Supplier Manual	SM	
16	Set Up for	Transaction Details	TRA	
17	Process for	Certificate_es	cert	
18	Process for	Subcontractor_es	sub	

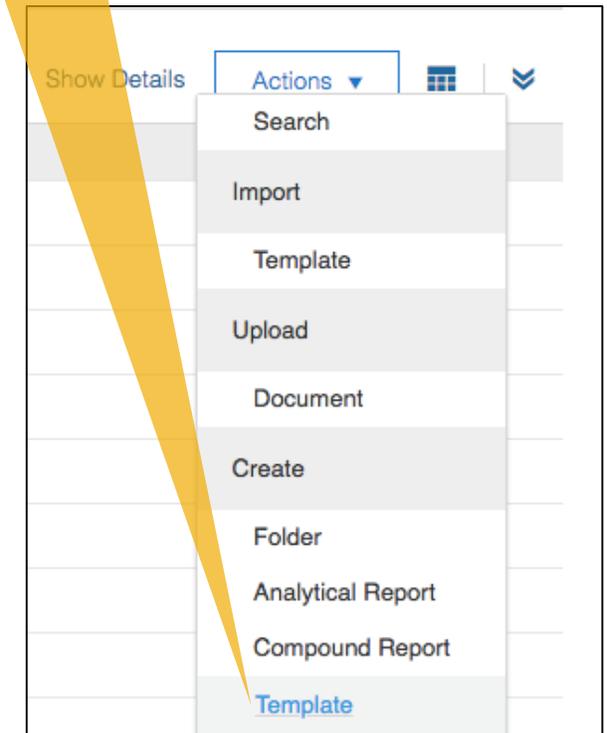
Configuring Modular Questionnaire

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

Name the template

Title: * Finance stability Translations ⓘ

Description: 

Translations

Configuring Modular Questionnaire

Step 2 – Create Modular questionnaire template cont'd

Finance Stability
SM Modular Questionnaire

Status: Draft
Version: Original

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

Finance Stability
SM Modular Questionnaire

Overview Documents Tasks Team Conditions Advanced Options H

Properties Actions ▾ Suggested

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)

Actions ▾

- Template
- View Details
- View History
- Edit Properties**
- Publish
- Revert
- Export Template
- Display
- Compact View

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

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.

Name: Finance Stability Translations ⓘ

Description: Rich text editor toolbar

Translations

ID: WS8661713 ⓘ

Owner: Swetha Beepyata ⓘ

Base Language: English

Rank: 0

Questionnaire Type: * (no value) ▼

Commodity: [Search more](#)

Regions: (no value) ▼

Departments: (no value) ▼

Allowed Commodity Levels: From: To:

Access Control: (no value) ▼ View Details ⓘ

Conditions: (none)▶

Questionnaire Type: * Finance stability ▼

Commodity: All Commodities All ▼ [Add more](#)

Regions: All All ▼ [Add more](#)

Departments: 0 All ▼ [Add more](#)

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: ⓘ

Is questionnaire required? Yes No ⓘ

Specify questionnaire type: * ⌵

Always open: Yes No ⓘ

Can expire? Yes No ⓘ

Expiration schedule: Expires every ⌵

Send reminder ⌵ 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.

Create Phase OK Cancel

Enter a **Title** and a **Description** for this new phase. **Subscribe For** controls the association between this phase and shared knowledge. You can **select** multiple knowledge area keywords to subscribe to, or subscribe to **All** if you [More](#)

Title: * First time approval Translations ⓘ

Description: Rich text editor toolbar ⓘ

Translations

Subscribe For: (none) select

Choose where the tasks in this phase should be applied: New Questionnaire ⓘ Questionnaire Update

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

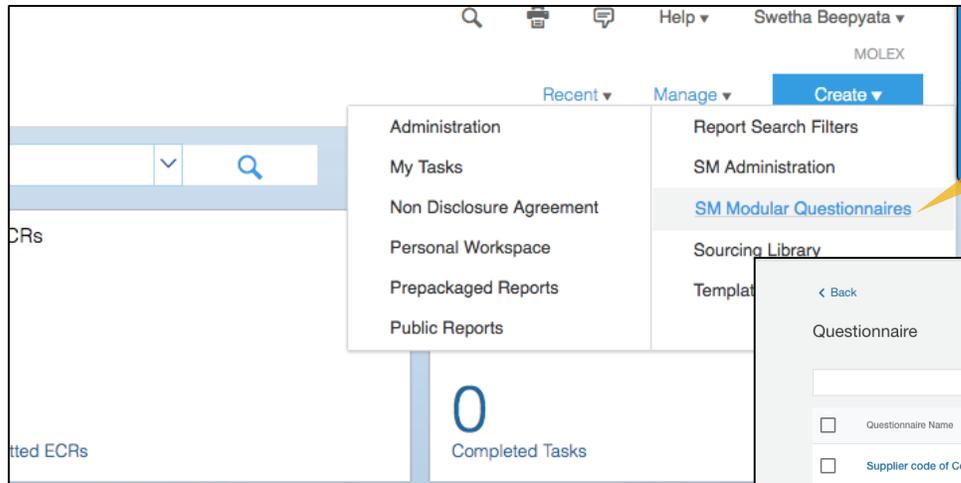
Modular Supplier Management Questionnaire

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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.

A screenshot of the 'Questionnaire' list view. At the top right is a button 'Select supplier to send'. Below it is a search bar. The main area contains a table with columns: Questionnaire Name, Category, Region, Business Unit, and Type. The table lists several questionnaires, each with a checkbox in the left margin.

Questionnaire Name	Category	Region	Business Unit	Type
<input type="checkbox"/> Supplier code of Conduct for Clothing in USA	Clothing	USA	Corporate	COC
<input type="checkbox"/> Supplier Manual for Packaging services	Packaging services	All	All	SM
<input type="checkbox"/> New Certificate test - Halal	All Commodities	All	All,Corporate	cert
<input type="checkbox"/> SB corporate responsibility - Feb8	Information Technology Broadcasting and Telecommunications	All	All	CR
<input type="checkbox"/> Subcontractor questionnaire	All Commodities	USA	All	sub
<input type="checkbox"/> New Test Template - 2	Drugs and Pharmaceutical Products			
<input type="checkbox"/> Compliance questionnaire	All Commodities			
<input type="checkbox"/> Furniture USA and Manufacturing	Furniture and Furnishings			
<input type="checkbox"/> testing questionnaire	Chlorine Cl			

Search by name

A screenshot of the 'Questionnaire' list view with the search bar containing the text 'fin'. The table below shows the search results, with one row highlighted in blue.

Questionnaire Name	Category	Region	Business Unit	Type
<input type="checkbox"/> Finance stability	All Commodities	All	All	Finance stability

Items per page: 25 1 - 1 of 1

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).

Search Filters

1 - 10 of 57 Results Select all Clear all Supplier selected: 0

<input type="checkbox"/>	V VIJAY SALES Mumbai, IN	Vendor ID VDR19075
<input type="checkbox"/>	B Bell services Palo Alto, CA, USA	Vendor ID 401345
<input type="checkbox"/>	A AP2Vanan_0208	Vendor ID VDRVananTest
<input type="checkbox"/>	D Delimiter19	Vendor ID VDR13100
<input type="checkbox"/>	D DLF CYBER CITY DEVELOPERS LIMITED. GURGAON, IN	Vendor ID VDR19056

< Back

kelly Filters

1 - 1 of 1 Results Select all Clear all Supplier selected: 1

K Kelly technologies
Palo Alto, CA, USA

More options

- Qualification status 0
- Categories 0
- Regions 0
- Departments 0
- Category status 0
- Registration status 2
- Integrated with ERP 0
- Primary Supplier Manager 0

- Unknown
- Registration Denied
- Not Invited
- Invited
- In Registration
- Pending Approval
- Pending Resubmit
- Registered

Filters (3): Registration Status: Pending Approval Registration Status: Registered

Cancel Clear all Apply

Continue

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**.

The screenshot displays the 'Buyer User Flow' interface for Step 3. At the top left, there is a '< Back' link. At the top right, there is a blue 'Send to Suppliers' button. Below the navigation, a summary states 'You selected 1 Suppliers and 1 Questionnaires'. The main content area is divided into two summary boxes: 'Supplier good to go' with a blue checkmark icon, the number '1', and the text 'Verify contacts before you send invitation'; and 'Supplier missing contact' with a question mark icon, the number '0', and the text 'These suppliers will be removed unless you add contact info'. Below these boxes, the details for the selected supplier are shown: a yellow square with the letter 'K', the name 'Kelly technologies', and the location 'Palo Alto, CA, USA'. To the right, the primary contact is identified as 'Swetha Beepyati' with a circular profile picture containing the initials 'SB'. A 'Change contact' button is located to the right of the contact information.

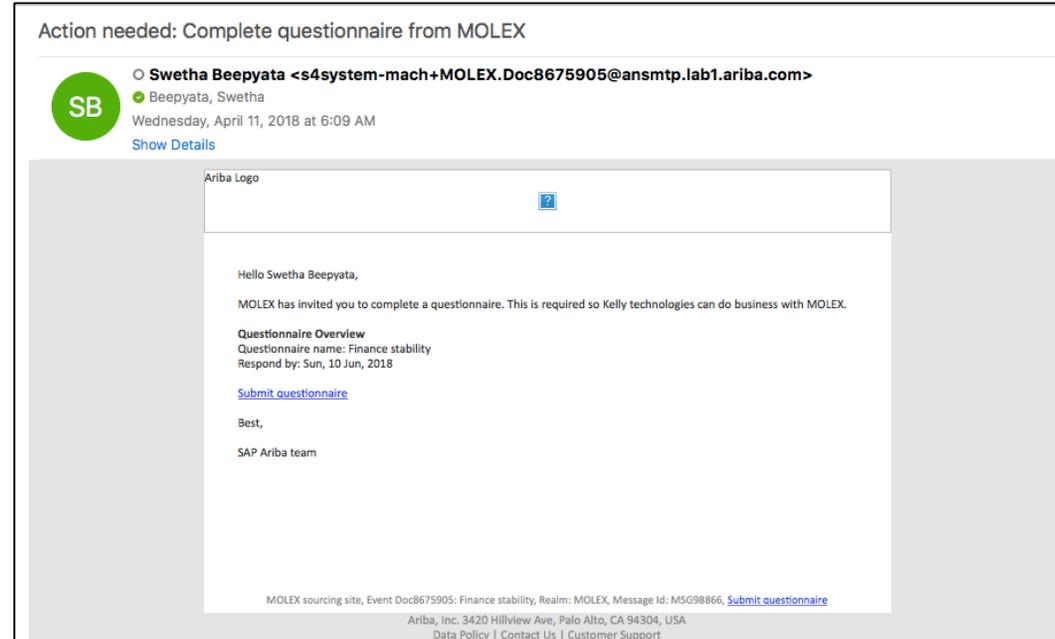
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Supplier User Flow

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



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

Doc8675905 - Finance stability 🕒 Time remaining
59 days 23:38:40

All Content 📄

Name ↑	
1 How long has your company been in business?	<input type="text"/>
2 How frequently do you update or enhance your software?	<input type="text"/>
3 Please provide with a copy of your commercial insurance levels	Attach a file
4 Do you have recent audit reports on privacy & security?	Unspecified ▾

(*) indicates a required field

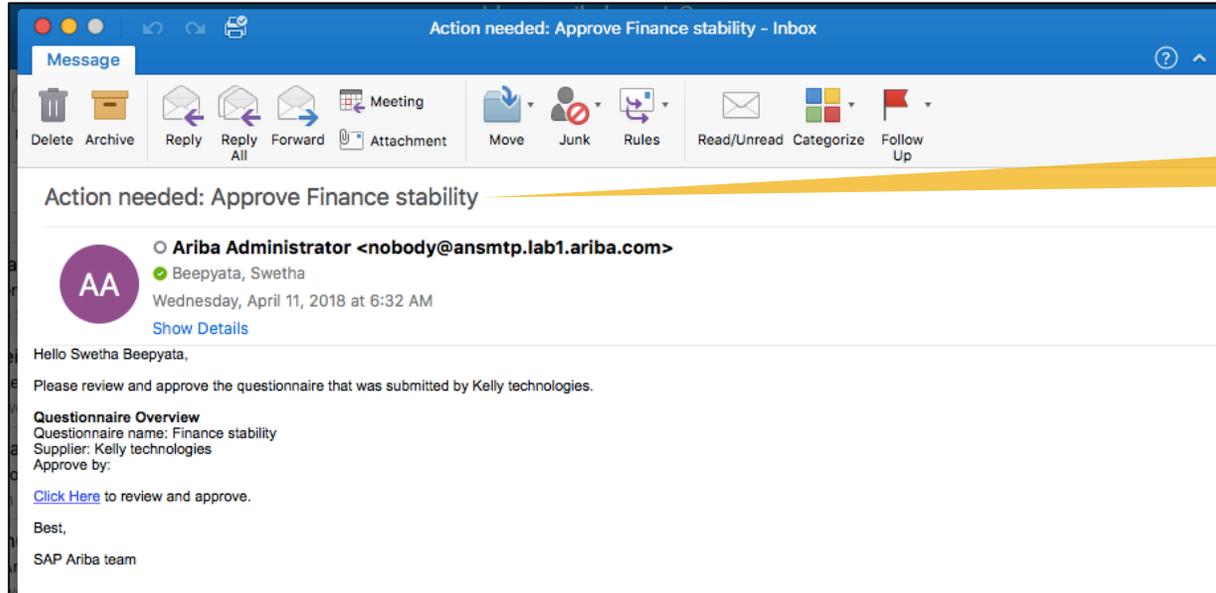
[Submit Entire Response](#) | [Save](#) | [Compose Message](#) | [Excel Import](#)

Modular Supplier Management Questionnaire

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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

The screenshot displays the "Approve Finance stability" task interface. At the top, there are buttons for "Request Additional Info", "Deny", and "Approve". Below this is a table with task details:

Supplier	Category	Started
Kelly technologies	All Commodities	April 11, 2018
Contact	Region	
Swetha Beepyata swetha.beepyata@sap.com	All	
Owner		
Swetha Beepyata		

Below the table is a "Process Flow" section showing a sequence of steps: "Questionnaire started" (green circle), "Approve Finance stability" (blue circle, currently active), and "Questionnaire approved" (grey circle). The "Approve Finance stability" step is highlighted with a blue box and includes the name "Swetha Beepyata" and "rashmi".

At the bottom, there is a "Supplier questionnaire" table with the following data:

Questionnaire	Response
1 How long has your company been in business?	30 years
2 How frequently do you update or enhance your software?	5 years
3 Please provide with a copy of your commercial insurance levels	
4 Do you have recent audit reports on privacy & security?	true

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

Overview	Registration	Questionnaires	Risk
Created Apr 9, 2018	Not invited	4	
▼ Questionnaires (4)			
Questionnaire Name	Sent on	Owner	Status
Finance stability	Apr 9, 2018	Project Owner	Not Responded
Finance stability	Apr 10, 2018	Swetha Beepyata	Pending Approval
Manual for apparel products	Apr 10, 2018	Project Owner	Not Responded
ISO certificates questionnaire	Apr 10, 2018	Swetha Beepyata	Pending Approval
▼ Tasks (4)			
Pending Tasks (1)			
Name	Action by	Start date	Due date
Approve Finance stability			
Pending Tasks (1)			
Name	Action by	Start date	Due date
Approve Finance stability	rashmi	Apr 11, 2018	
Pending Tasks (1)			
Name	Action by	Start date	Due date
Approval for Manual for apparel products			
Pending Tasks (1)			
Name	Action by	Start date	Due date
Approve ISO certificates	Quality	Apr 11, 2018	