



Feature at a GlanceTemplate Upgrade for Modular Supplier Management Questionnaires

David Leonard, SAP Ariba Target GA: September, 2018

CONFIDENTIAL



Feature at a Glance

Introducing: Template Upgrade for Modular Supplier Management Questionnaires

Customer challenge

A previous release introduced template upgrade for supplier registration projects. This feature adds support for upgrading modular supplier management projects to the latest template version using the same template upgrade tool.

Meet that challenge with

SAP Ariba

This feature introduces the ability to upgrade existing modular supplier management projects that were created with previous template versions to the latest published template version. The SM administrator can manage the upgrade process by selecting groups of suppliers impacted by the template change for each of the previous template versions, by triggering the template upgrade, and sending an automatic notification to the primary contact at each supplier.

Experience key benefits

Getting suppliers on the latest version of modular supplier management questionnaires results in a more consistent and up-to-date data set in SLP, and through synchronization in ERP.

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 to have this feature turned on for you.

Prerequisites and Limitations

Modular Questionnaire and Template Upgrade features must be enabled.

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

When projects are upgraded to a new version the old version is archived and SLP sends a notification to the project owner regarding the archival. This notification cannot be turned off.

Feature at a Glance

Introducing: Template Upgrade for Modular Supplier Management Questionnaires

Detailed feature information

It is anticipated that modular supplier management questionnaire templates will change over time. This feature adds the capability to push updates to modular supplier management questionnaire templates into eligible supplier projects. Eligible supplier projects means projects where either none of the tasks have started, or all tasks have completed. Once active tasks are completed they then become eligible for upgrade.

Modular supplier management questionnaire projects in Not Responded, Pending Submission, Submitted, Denied, Expiring, or Expired statuses are always eligible for upgrade. Projects in Pending Approval status are never eligible for upgrade. Projects in Approved status are eligible only if an update is not in approval.

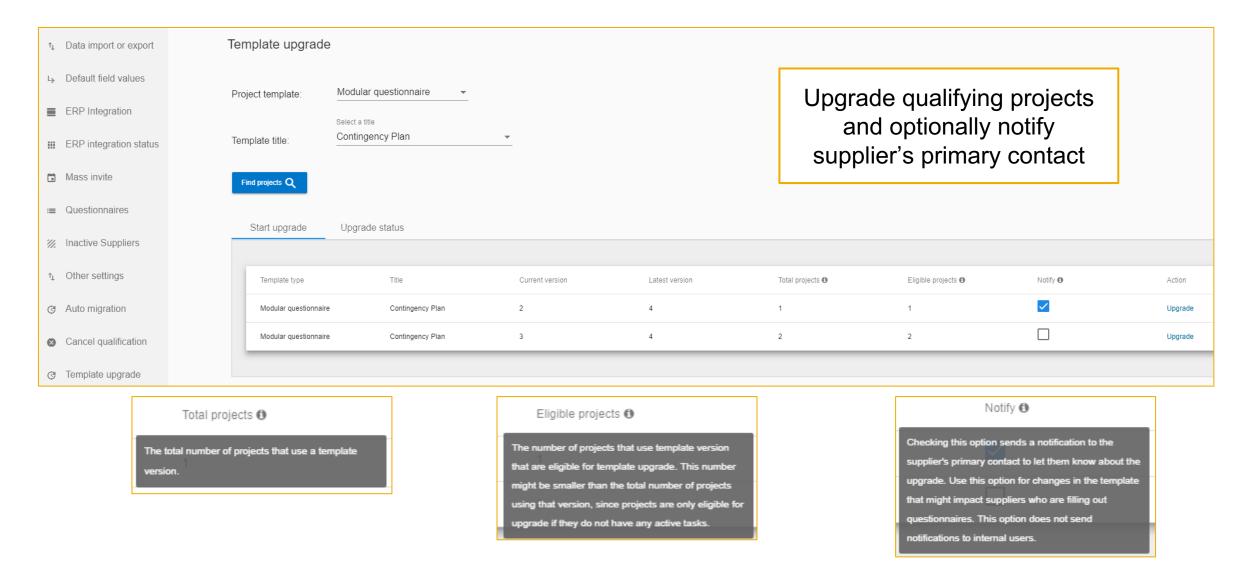
To perform a template upgrade the user must be part of the SM Ops Administration group. There are two steps to performing a template upgrade - first modify and publish the template, then perform the template upgrade itself within SM Administration.

Process:

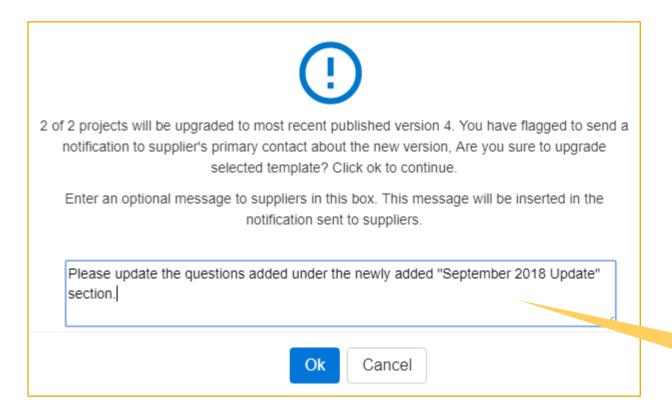
- A user in the Template Creator group will navigate Manage > Templates and find the desired Modular Questionnaire template, create a new version, update it, and publish a new version.
- A user with SM Ops Administrator will navigate SM Administration > Template upgrade to perform the upgrade.
 - On the Template upgrade page, select "Modular questionnaire" for the "Project template" field, then select the specific Modular Questionnaire that was updated and click the "Find projects" button. The eligible projects will have the "Upgrade" action available.
 - Specify if suppliers should be notified via a checkbox
 - Click Upgrade for the eligible projects to be upgraded
 - Enter an optional note to the suppliers primary contact this note is inserted into the email notification
- Track upgrade progress in Upgrade Status page
- Download a report with the supplier projects that got upgraded

To add custom content to the configurable notification to suppliers, define the custom content under Administration > Project Email Templates > Project Type SM Modular Questionnaire

Template Upgrade > Find Projects



Template Upgrade > Notify & Upgrade



Insert a note to the supplier's primary contact calling attention to what changed in the questionnaire

Template Upgrade > Project Email Templates > Customize Email Content Notify Suppliers (default content)

