



# Feature at a Glance

## Template Upgrade for Modular Supplier Management Questionnaires

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## Feature at a Glance

# Introducing: Template Upgrade for Modular Supplier Management Questionnaires

Ease of implementation  some complexity  
Geographic relevance  global

## 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.

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## 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

Data import or export

Default field values

ERP Integration

ERP integration status

Mass invite

Questionnaires

Inactive Suppliers

Other settings

Auto migration

Cancel qualification

Template upgrade

## Template upgrade

Project template: Modular questionnaire

Template title: Select a title  
Contingency Plan

[Find projects](#)

[Start upgrade](#) [Upgrade status](#)

Template type	Title	Current version	Latest version	Total projects	Eligible projects	Notify	Action
Modular questionnaire	Contingency Plan	2	4	1	1	<input checked="" type="checkbox"/>	<a href="#">Upgrade</a>
Modular questionnaire	Contingency Plan	3	4	2	2	<input type="checkbox"/>	<a href="#">Upgrade</a>

Upgrade qualifying projects and optionally notify supplier's primary contact

### Total projects ⓘ

The total number of projects that use a template version.

### Eligible projects ⓘ

The number of projects that use template version that are eligible for template upgrade. This number might be smaller than the total number of projects using that version, since projects are only eligible for upgrade if they do not have any active tasks.

### Notify ⓘ

Checking this option sends a notification to the supplier's primary contact to let them know about the upgrade. Use this option for changes in the template that might impact suppliers who are filling out questionnaires. This option does not send notifications to internal users.

## Template Upgrade > Notify & Upgrade



2 of 2 projects will be upgraded to most recent published version 4. You have flagged to send a notification to supplier's primary contact about the new version, Are you sure to upgrade selected template? Click ok to continue.

Enter an optional message to suppliers in this box. This message will be inserted in the notification sent to suppliers.

Please update the questions added under the newly added "September 2018 Update" section.

Ok

Cancel

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)

### Edit Message

Change the subject and content of the Email Template (if desired). Click Save to save the changes or Cancel out of the page without saving the changes.

Notification: Organization: Sent to supplier primary user when a template upgrade requires suppliers to review/update questionnaire

Project Type: \* SM Modular Questionnaire ▾

Subject: \* [SYSTEM\_CORPORATE\_NAME] has updated a questionnaire and requires your attention

Add Email Template Token

#### Translations

Content:



You are being notified of a change done to [Title] from [SYSTEM\_CORPORATE\_NAME] and requires your attention to review or update the questionnaire.

Details:  
[TEMPLATE\_UPGRADE\_NOTE]

[SITE\_URL] to login to your Ariba account and access [Title].