



Feature at a Glance

Mass upload contract documents to multiple workspaces

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CONFIDENTIAL

Feature at a Glance

Ease of implementation



Low touch / simple

Geographic relevance



Global

Introducing: Mass upload contract documents to multiple workspaces

Customer challenge

New documents may sometimes be needed to be added to multiple workspaces to reflect changes in regulatory policies, company/commodity/ supplier specific processes etc. Currently adding documents to multiple workspace is a time consuming process as document had to be added to each workspace individually.

Meet that challenge with SAP Ariba

With this feature, contract administrators can add new documents by choosing the Document type, and upload the documents individually or as a single .zip file containing multiple contract documents through the Mass Edit Feature.

This feature also introduces a change to an existing functionality of uploading documents in contract workspaces through the source template. This feature ensures that when new documents are pushed in to contract workspace via the template, Contracts Workspaces that are in the published state are automatically moved to the Amendment state thus notifying the workspace owners of the change.

Experience key benefits

Provides an efficient way of maintaining a common set of documents across several contracts workspaces

Solution area

SAP Ariba Contracts

Implementation information

This will be enabled for all customers

Prerequisites and Limitations

None

Mass upload contract documents to multiple workspaces

Mass uploading documents through the mass edit feature

The screenshot shows the SAP Administration menu. The 'ADMINISTRATION' tab is selected and highlighted with a dashed blue box. The 'Mass Edit Projects' option is highlighted with a solid yellow box and a dashed blue border. The main content area displays the 'Administrator' page with a list of administrative tasks.

HOME SUPPLIER MANAGEMENT **ADMINISTRATION** MORE... Recent Manage Create

Administrator

Choose the type of administrative task you would like to perform.

- Site Manager**
Depending upon your configuration: Import and export data. Run scheduled tasks. View the audit log. Manage user sessions.
- Integration Manager**
Depending upon your configuration: Import and export data. Configure events. Configure external system connection information. Configure the integration shared secret.
- Master Data Manager**
Configure External Systems. Search & administer master data. Manage master data load requests.
- Supplier and Customer Manager**
Manage suppliers, customers, and their users. Supplier and customer users are members of external organizations who log in to the Ariba system with restricted access.
- User Manager**
Manage users.
- Customization Manager**
Depending upon your configuration: Work with brands and customize user interface text. View, add, modify, and delete partitioned commodity codes and partitioned commodity code maps. Import and export data.
- Project Manager**
Manage keywords used in knowledge matching and replace users in projects.
- Reporting Manager**
Perform reporting-related administrative tasks.
- Dashboard Manager**
Dashboard Manager
- Product Sourcing Manager**

- Integration Manager**
- Supplier and Customer Manager**
- Customization Manager**
- Spend Visibility Manager**
Perform administrative tasks for Spend Visibility.
- Event Manager**
Customize system emails for sourcing events and set up exchange rates for multi-currency auctions.
- Commodity Code Manager**
Work with hierarchical commodity codes, including creating mappings between commodity code domains.
- Enrichment Manager**

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Mass uploading documents through the mass edit feature

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Mass Edit Projects



Search for projects that need to be updated, then **select** and **add** projects to the updating bucket.

1 Select Projects

2 Select Fields

3 Select Project Group Fields

4 Review Edits

Search No project to update 1

Project Type Contract Workspace (Procurement)

Search Filter

Search using Title, ID, or any other term

Effective Date Last Year From: 01/01/2018 To: 12/31/2018

Term Type No Choice

Creation Date No Choice

Options

2

Search Result 7 contract(s) found

Search Reset

ID ↑	Title	Contract ID
<input checked="" type="checkbox"/> CW2013	CW-replace1	CW2013
<input checked="" type="checkbox"/> CW2026	CW-Replace2	CW2026
<input checked="" type="checkbox"/> CW2029	CW-replace3	CW2029
<input checked="" type="checkbox"/> CW2031	CW-replace4	CW2031
<input checked="" type="checkbox"/> CW2034	CW-replace5	CW2034
<input checked="" type="checkbox"/> CW2038	CW-replace6	CW2038
<input checked="" type="checkbox"/> CW2049	CW-base	CW2049

Add

- Select the Contract Workspace from the Project Type menu
- Using search filters, select the contracts workspaces that need to be updated

Mass upload contract documents to multiple workspaces

Mass uploading documents through the mass edit feature

Select Project fields to update

Select fields within the projects that need to be updated and press **OK**, or press **Cancel**.

Project Fields to update

Affected Parties

Agreement Date

Contract Amount

External System

Departments

Commodity

Effective Date

Owner

Access Control

Proposed Contract Amount

Upload Document(s)

Mass Edit Projects

Prev Next Exit

Select fields within the projects that need to be updated.

Fields to Update	Update Types	Old Values	New Values
No Items			

Select Fields to Update

Upload Document or Documents Please ZIP Document or Documents before upload Choose File No file chosen Upload Remove

Prev Next Exit

File name: Document.zip All Files Open Cancel

1

2

3

- Select the option: Upload Documents
- Upload the document using the Choose file option. If more than one document needs to be uploaded, create a .zip file that contains all the documents and upload the .zip file

Mass upload contract documents to multiple workspaces

Mass uploading documents through the mass edit feature

Mass Edit Projects

Please **confirm** that you want to update **7 listed projects** with the newly specified field values.

Projects to be updated

Number of projects to update:7

ID ↑	Title	Contract ID
CW2013	CW-replace1 ▾	CW2013
CW2026	CW-Replace2 ▾	CW2026
CW2029	CW-replace3 ▾	CW2029
CW2031	CW-replace4 ▾	CW2031
CW2034	CW-replace5 ▾	CW2034
CW2038	CW-replace6 ▾	CW2038
CW2049	CW-base ▾	CW2049

Prev Update Exit

- Review the projects that have been selected for the document upload
- Submit the changes through the Update button

New field values

Fields to Update	Update Types	Old Values	New Values
No items			

Select Fields to Update

Upload Document or Documents Please ZIP Document or Documents before upload Document.zip Upload

Mass Edit Projects

Review changes you have made.

User	Start Time ↓	Complete Time	Status	Log
Customer Support Admin	1/23/2019 8:48 AM		Submitted	

Refresh Status

Exit

1 Select Projects
2 Select Fields
3 Select Project Group Fields
4 Review Edits

Mass upload contract documents to multiple workspaces

View status of mass upload of documents

Mass Edit Status

Click on **View details** for more information about any particular mass edit task.

User	Start Time ↓	Complete Time	Status
Customer Support Admin	1/23/2019 8:48 AM	1/23/2019 8:48 AM	Completed processing all projects. 7 out of 7 project(s) changed.

[Refresh Status](#) [Log](#) [View Details](#)

Project Name	ID	Field Name	Old Value	New Value	Update Succeeded
CW-replace3	CW2029	Contract Amount	\$10 USD	\$10 USD	yes
CW-base	CW2049	Contract Amount	\$10 USD	\$10 USD	yes
CW-replace4	CW2031	Contract Amount	\$10 USD	\$10 USD	yes
CW-replace1	CW2013	Document	aql.txt	aql.txt	yes
CW-replace1	CW2013	Document	Copy of (Pivot_Area_Pie)...	Copy of (Pivot_Area_Pie)...	yes
CW-replace1	CW2013	Document	muhil_Resume.docx	muhil_Resume.docx	yes
CW-replace1	CW2013	Document	muhil_Resume.pdf	muhil_Resume.pdf	yes
CW-replace6	CW2038	Document	aql.txt	aql.txt	yes
CW-replace6	CW2038	Document	Copy of (Pivot_Area_Pie)...	Copy of (Pivot_Area_Pie)...	yes
CW-replace6	CW2038	Document	muhil_Resume.docx	muhil_Resume.docx	yes
CW-replace6	CW2038	Document	muhil_Resume.pdf	muhil_Resume.pdf	yes
CW-replace5	CW2034	Document	aql.txt	aql.txt	yes
CW-replace5	CW2034	Document	Copy of (Pivot_Area_Pie)...	Copy of (Pivot_Area_Pie)...	yes
CW-replace5	CW2034	Document	muhil_Resume.docx	muhil_Resume.docx	yes
CW-replace5	CW2034	Document	muhil_Resume.pdf	muhil_Resume.pdf	yes
CW-replace3	CW2029	Document	aql.txt	aql.txt	yes
CW-replace3	CW2029	Document	Copy of (Pivot_Area_Pie)...	Copy of (Pivot_Area_Pie)...	yes

- Status of the mass upload of documents can be viewed using the Mass Edit Status functionality
- Upon clicking View Details, the status of the document uploads is displayed in the Excel sheet

Mass upload contract documents to multiple workspaces

The screenshot displays the SAP Contract Workspace (Procurement) interface for contract ID CW2049. The interface is divided into several sections:

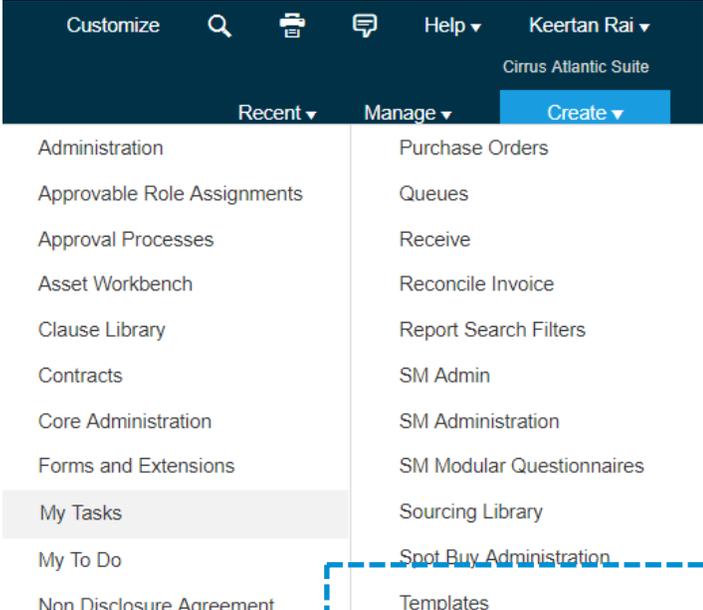
- Related Knowledge:** Includes links for 'Expand Projects', 'All Knowledge Areas', and 'Search Knowledge'.
- Contract Details (Overview):** A dashed blue box highlights the following information:
 - Contract ID: CW2049
 - Contract Status: Draft
 - Version: Original
 - Owner: Customer Support Admin
 - Test Project: No
 - Base Language: English
 - Access Control: (no value)
 - Description: (empty)
- Tasks:** A dashed blue box highlights a table with the following content:
 - Header: Documents
 - Content: A table with 4 rows, each showing a document icon, name, and status.
- Summary:** ID CW2049, Tasks: Incomplete Tasks: 0

Documents	Status
muhil_Resume	Draft
muhil_Resume	Draft
Copy of (Pivot_Area_Pie)	Draft
aql	Draft

- Mass uploaded documents are reflected under the Documents Tab of the respective Contract Workspaces
- If the target contract workspace is in Published status, upon uploading the document the workspace status is changed to Amendment status

Mass upload contract documents to multiple workspaces

Mass uploading documents to contract workspace through templates



The screenshot shows the SAP Fiori navigation menu. The 'Create' button is highlighted in blue. The 'Templates' menu item is highlighted with a blue dashed box. Below the navigation menu, the 'Templates' page is shown with the 'Documents' tab selected. A list of templates is displayed, with 'CW-templateReplaceNormal' highlighted by a blue dashed box.

Customize 🔍 🖨️ 💬 Help ▾ Keertan Rai ▾
Cirrus Atlantic Suite

Recent ▾ Manage ▾ Create ▾

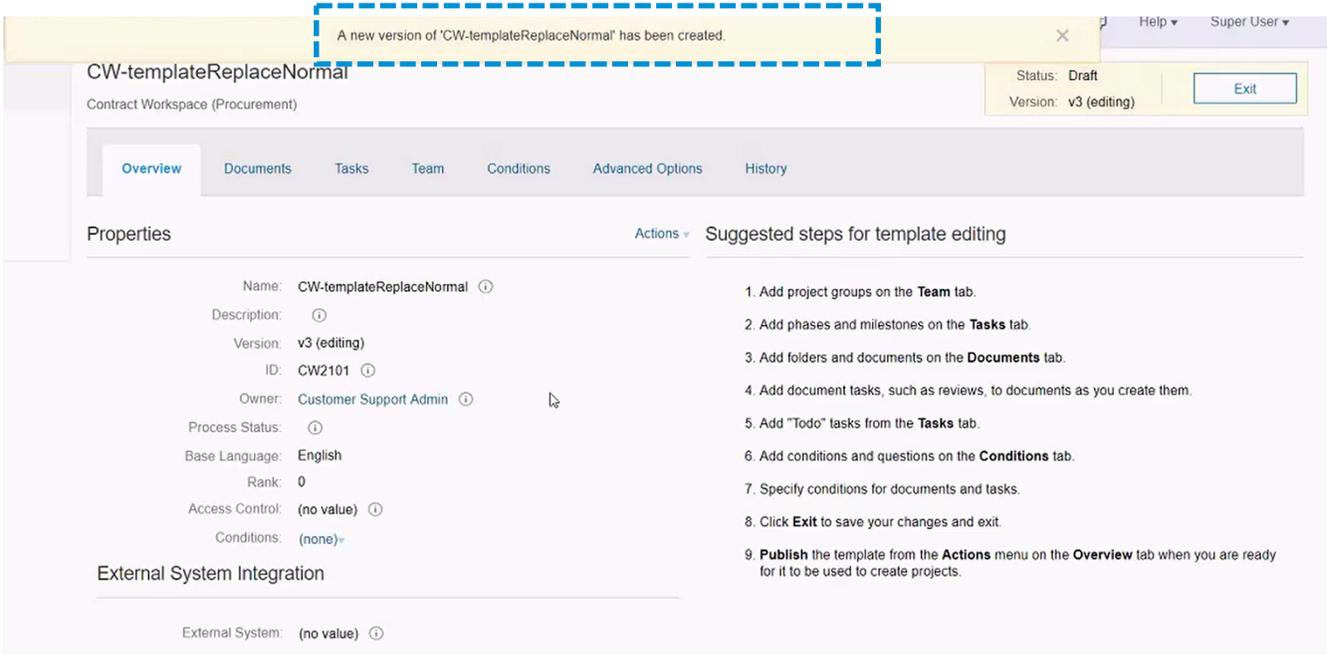
- Administration
- Approvable Role Assignments
- Approval Processes
- Asset Workbench
- Clause Library
- Contracts
- Core Administration
- Forms and Extensions
- My Tasks
- My To Do
- Non Disclosure Agreement
- Purchase Orders
- Queues
- Receive
- Reconcile Invoice
- Report Search Filters
- SM Admin
- SM Administration
- SM Modular Questionnaires
- Sourcing Library
- Spot Buy Administration
- Templates

Templates

Overview Documents Team History

Templates

Name
<input checked="" type="checkbox"/> CW-Blank
<input checked="" type="checkbox"/> CW-TemplateReplace
<input checked="" type="checkbox"/> CW-templateReplaceNormal
<input checked="" type="checkbox"/> Contract Line Item Templates



The screenshot shows the SAP Fiori template editing page for 'CW-templateReplaceNormal'. A notification banner at the top states 'A new version of 'CW-templateReplaceNormal' has been created.' The page has tabs for Overview, Documents, Tasks, Team, Conditions, Advanced Options, and History. The 'Overview' tab is active, showing properties and suggested steps for template editing.

A new version of 'CW-templateReplaceNormal' has been created.

CW-templateReplaceNormal
Contract Workspace (Procurement)

Status: Draft
Version: v3 (editing) Exit

Overview Documents Tasks Team Conditions Advanced Options History

Properties Actions ▾ Suggested steps for template editing

Name: CW-templateReplaceNormal ⓘ
Description: ⓘ
Version: v3 (editing)
ID: CW2101 ⓘ
Owner: Customer Support Admin ⓘ
Process Status: ⓘ
Base Language: English
Rank: 0
Access Control: (no value) ⓘ
Conditions: (none)»

External System Integration

External System: (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 create them.
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.
9. **Publish** the template from the **Actions** menu on the **Overview** tab when you are ready for it to be used to create projects.

- Navigate to the contract template that needs to be edited
- Create a new version of the template

Mass upload contract documents to multiple workspaces

Mass upload contract documents by using the edit template option

CW-templateReplaceNormal
Contract Workspace (Procurement)

Status: Draft
Version: v3 (editing) [Exit](#)

Overview Documents Tasks Team Conditions **Advanced Options** History

These are advanced options for the project template. Please see sections for details.

▼ Document Process Settings ⓘ [Edit](#)

Name ↑	Ad Hoc Create Limit
Default for all Form Template types	No Limit
Savings Form	No Limit

▼ Upgrade Template Settings ⓘ

Upgrade all projects to the published version of the template: Yes No ⓘ

- Ensure the Upgrade Template Settings is set to 'Yes'
- Upload the new documents to the template workspace

CW-templateReplaceNormal
Contract Workspace (Procurement)

Status: Draft
Version: v3 (editing)

Overview **Documents** Tasks Team Conditions Advanced Options History

CW-templateReplaceNormal [Show Details](#)

Name	Owner	Conditions
localTemplate ▾	Project Owner	(none)▾
Boeing ▾	Project Owner	(none)▾

[Search](#)
[Upload](#)
Document
Team Member Rules
Participant Rules
[Create](#)
Folder
Analytical Report
Compound Report
Document
Blank Agreement

Mass upload contract documents to multiple workspaces

Mass upload contract documents by using the edit template option

The screenshot displays the SAP Contract Workspace interface for 'CW-test-base' (ID CW2087). The workspace is in a 'Draft Amendment' state. The 'Documents' tab is active, showing a list of documents including '2019 Holiday Calendar', 'localTemplate', and 'Boeing'. The 'Overview' tab shows contract details such as 'Contract ID: CW2087', 'Contract Status: Draft Amendment', 'Version: v2 (editing)', 'Owner: Customer Support Admin', 'Test Project: No', 'Base Language: English', 'Access Control: (no value)', and 'Description:'. The 'Documents' tab also shows a table of documents with columns for Name, Owner, and Status.

Name	Owner	Status
2019 Holiday Calendar	Project Owner	Not Edited
localTemplate	Project Owner	Not Edited
Boeing	Project Owner	Not Edited

- Publish the template
- Upon publishing the template, the newly added documents are reflected in the documents tab of all the workspaces that are based on that respective template
- In case the contract workspace is in a published state, the inclusion of new documents in to the source template results in the contracts workspace status to be changed to Amendment status

Thank you.