



# Feature at a Glance

**Ability to edit or cancel engagement request at any time before final project approval**

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CONFIDENTIAL

## Feature at a Glance

# Introducing: Ability to edit or cancel engagement request at any time before final project approval

## Customer challenge

Previously, engagement requests could not be edited if assessments had been sent or if the request had been denied.

## Meet that challenge with

### SAP Ariba

This feature allows editing and cancelling of engagement requests in any phase before final approval is completed.

Changes may cause controls and assessments to be added or removed. Changes may also affect related approval, evidence collection, and control review tasks already in progress.

## Experience key benefits

This provides users more flexibility in managing changes that occur during the lifecycle of an engagement risk project.

It is easier to incorporate changes resulting from new information, changed requirements, external events or approvals that were denied.

Feedback improvements highlight the effects of changes to the request at each step of the editing process.

## Solution area

SAP Ariba Supplier Risk

## Implementation information

This feature is automatically on for all customers with the applicable solutions but requires **customer configuration**.

To enable this feature, a customer administrator must enable the self-service site configuration parameter:

Application.SR.Engagement.AllowAdvancedEditCancel

## Prerequisites and Restrictions

SAP Ariba Supplier Risk entitlement

Your site must be configured for use of control-based engagement risk assessment projects. This feature applies specifically to engagement requests created from the Supplier Risk Engagement Project Template.

This feature is not relevant to legacy engagement risk assessment projects based on the Supplier Engagement Risk Assessment Project Template.

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**How to edit an engagement request for a control-based engagement risk assessment**

The screenshot displays the SAP Engagement Requests interface. At the top, there are two summary boxes: "0 New requests" and "836 in progress". Below this is a table of engagement requests with columns for ID, Name, and Supplier. A callout box points to the "190619\_Hotel71\_01" entry in the table, stating: "1. Click the Engagement Requests link on the Supplier Risk dashboard or in a supplier 360° view."

The detailed view for "190619\_Hotel71\_01 (ID: WS4810997)" is shown. It includes an "Engagement Summary" section with details like Commodity, Region, Business Unit, Requester, Requested on, Owner, Inherent Risk, and Status. An "Action" dropdown menu is visible, with "Edit request" highlighted. A callout box points to this menu, stating: "2. Choose Action > edit request and enter comment to begin editing the Engagement Request."

The "Confirm Edit Engagement Request" dialog is open, asking "Are you sure you want to edit this engagement request?". It lists several consequences of editing: status change to 'in edit', no assessments during edit, inability to change supplier if assessments are sent, and potential changes to screening questions and approvals. A text input field is provided for a comment, with a "2000 Characters Remaining" indicator. A callout box points to this field, stating: "3. Enter comment and confirm edit to begin editing the Engagement Request."

ID	Name	Supplier
WS4812264	sha 20Jun19 AdSE	Not set
WS4814063	test	Not set
WS4813763	test1	
WS4812790	yh 14e	
WS4812297	sha 19Jun19 5:04pm ARI-7201	
WS4811694	yh 14c 4	Not set
WS4811728	sha 19Jun19 4:11pm SM-15944	Hawaii
WS4811366	yh 14c 3	Not set
WS4810997	190619_Hotel71_01	HOTEL 71 CHICAGO
WS4810092	yh 14 d	UT SOUTHWESTRN MEDICAL CTR
WS4810035	yh 14 d	ROBERT WALTERS (SINGAPORE) PTE LTD

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### How to edit an engagement request for a control-based engagement risk assessment

The screenshot shows a multi-step process for an engagement request. The steps are: 1. Business details, 2. Inherent risk screening, 3. Select supplier, and 4. Review request. The current view is on step 2, 'Inherent Risk Screening Questions'. A notification bar at the top indicates 'Questions added: 3 Questions removed: 1'. The interface includes buttons for 'Revert Edit', 'Save', and 'Next'. Callouts provide the following instructions:

- 4. Use Next & Back buttons to navigate to different steps of the request to make edits.
- 5. Changes to business details may cause screening questions to be added or removed. When you click Next after making such changes, business detail changes are saved and the number of questions added and removed is noted on the Inherent Risk Screening Questions page.
- 6. Screening questions added based on the current edit are indicated so the user knows the question is new even if it has a default answer.
- 7. Choose Save at any point to save your changes without submitting. The request is included in the list of In Process engagement requests, with status In Edit.
- 8. Choose Revert Edit to undo all changes made while this request has been in In Edit status. If you click OK to the confirmation message, the request reverts to its pre-edit state.

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## How to edit an engagement request for a control-based engagement risk assessment

1 Business details      2 Inherent risk screening      3 Select supplier

Controls added: 2 Controls removed: 1

Due Diligence

Selected supplier

HOTEL 71 CHICAGO CHICAGO, US ...

5 out of 5 controls matched  
3 pending, 2 effective, 0 ineffective

Remove supplier

Recommended suppliers

SOLUCAO SUPERNOVA CONSULTORIA FARMA, RUA TEODORO SAMPAIO, SAO PAULO, BR ...

Qualified for at least one selected commodities

4 out of 6 controls matched  
4 pending, 0 effective, 0 ineffective

Zubas & Associates, John Street, Toronto, CA (S10017934) Toronto, CA ...

Qualified for at least one selected commodities

4 out of 6 controls matched  
2 pending, 2 effective, 0 ineffective

9. Changed answers to the Inherent Risk Screening Questions may cause risk controls to be added or removed. When you click Next after making such changes, changes are saved and the number of controls added and removed is noted on the supplier selection page

10. On the supplier selection page:

- If this request already has a supplier but external assessments have not been sent, you can change the supplier.
- If this request has a supplier and external assessments have already been sent, you cannot change the supplier.
- If your configuration allows this, the request being edited may not already have a supplier: in this case, you can select a supplier during edit.

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### How to edit an engagement request for a control-based engagement risk assessment

11. Each section of the Review Request page highlights additions and changes. Completed tasks that are no longer relevant are shown on a Withdrawn tasks tab in that section of the review page

Revert Edit Back Save Submit request

1 Business details 2 Inherent risk screening 3 Select supplier 4 Review request

Business details and Inherent risk screening

Business details

BUSINESS DETAILS (190619_HOTEL71_01)		ORIGINAL	CURRENT
1	Title	190619_Hotel71_01	190619_Hotel71_01
2	Description	Demo - Original ER	Demo - Original ER
3	Commodity	Data base reporting software, Data base user interface and query software	Data base reporting software, Data mining software
4	Region		
5	Department		
6	Date_TestSM-10749		6/12/2019
7	Select Multiple users		Arnold Page
8	Select multiple choices		
9	Test Supplier masterdata		
10	Masterdata type user		aagassi
11	Test Comment on Section		
12	Attachment		
14	Change this to trigger approval task		

Inherent risk screening

INHERENT RISK SCREENING QUESTIONS (190619_HOTEL71_01)		ORIGINAL	CURRENT
1	Triggered Attributes		
2	Will / Does the supplier provide cloud based hosting arrangements?	No	Yes
3	Will / Does the service involve telecommunication or data center service?	No	Yes
4	Will / Does the service involve software development?	Yes	Yes
5	Will / is the supplier (be) responsible for delivering and managing BUYER owned production, databases and associated systems infrastructure and / or network infrastructure?	Yes	No
	Will / does the supplier provide processing of BUYER data which has been rated as critical by the		

12. Navigate to the final review step and click Submit request.

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## How to edit an engagement request for a control-based engagement risk assessment

Inherent risk: Low  
Inherent Risk (Commodity): High  
Status: In Edit (Currently being edited by Peter04.)

Supplier:  
Name: HOTEL 71 CHICAGO  
Legal name: HOTEL 71 CHICAGO  
Contact name: peter\_hotel71 wohlsen\_hotel71  
Telephone:  
Email: peter.wohlsen+hote

Approval Flow

Tasks (8)  
Pending tasks (5) Completed tasks (3)

Name	Action by	Start date	Due date
4323_first Control Review	DecisionMaker	Jun 19, 2019	

13. When an Engagement Request has the status In Edit, all workflow tasks can continue to be performed except sending assessments

Advanced view View activities Action

- Create issue
- Change owner
- Manage project team
- Edit request
- Cancel request

Business Unit: N/A  
Owner: Alex Agassi  
Status: In Edit (Currently being edited by Peter04.)

14. Only one user can edit an engagement request at a time. For other project owner project group members, the option is grayed out

15. The user name of the editor is shown next to the status indicator.

Warning

Assessments cannot be sent while an engagement request is being edited.

OK

What do you want to do with this engagement request?

- Continue editing the engagement request
- Go to engagement summary page to access assigned due diligence tasks

Edit Summary

16. The user who is editing the engagement can save the edit then can select the request from the list page to choose to go to the engagement summary page or return to editing the request.

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### About editing a previously submitted engagement request

- An engagement request has **significant changes** when they result in the addition or removal of one or more controls.
- Changes to the request are considered **insignificant** when they do not result in addition or removal of controls.
- **A change of supplier** is always treated as a **significant change**, even if no controls are added or removed.
- If a new commodity was added, triggering re-review for a service-type control specifically for this new service: this is not the addition of a control and thus is not considered a significant change. The new service alone does not re-trigger the approval task.
- You can use the supplier field mapping **project.reapprove** in the control-based engagement request project template to indicate that for a specific question or attribute, any change in response should always require re-approval of the engagement request, even if it does not result in addition or removal of a control.
- When the edited request is submitted:
  - If the changes are significant or if a request attribute mapped with project.reapprove was changed, all approval tasks for the engagement request are reactivated.
  - Significant changes will also reactivate the send assessment task if new assessments are required based on the edit and all control reviews for engagement-type controls even if reviewed before the edit was submitted
  - If the engagement request was previously denied and had no other changes or only insignificant changes to fields not mapped with project.reapprove: all approval tasks are reactivated.
  - Otherwise, approval tasks are not reactivated.

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## How to cancel an engagement request for a control-based engagement risk assessment

1. When a requester or governance expert realizes that an engagement is not needed, they can cancel it to remove it from the pipeline.

2. Click the Engagement Requests link on the Supplier Risk dashboard or in a supplier 360° view, click the In Progress tile, locate the engagement, and click its name..

The screenshot displays the 'Engagement requests (925)' interface. At the top, there are two summary boxes: '0 New requests' and '836 in progress'. Below these are navigation controls including 'Export', 'First', '<', '>', 'Last', 'Viewing: 1/56', and a search icon. The main content is a table with columns: ID, Name, Supplier, Owner, Requested by, and a date column. A dropdown menu is open over the 'Action' button, showing options: 'Create issue', 'Change owner', 'Manage project team', 'Edit request', and 'Cancel request' (highlighted in blue).

ID	Name	Supplier	Owner	Requested by	
	sha 20Jun19 AdSE	Not set	nikita002	nikita002	
WS4814063	test	Not set	Som Ditsu	Som Ditsu	
WS4813763	test1	ACCENTURE LLP	RadStage	RadStage	
WS4812790	yh 14e	Not set	yhart	yhart	
WS4812297	sha 19Jun19 5:04pm ARI-7201	Jorand of Hawaii	nikita002	nikita002	Jun 19, 2019
WS4811694	yh 14c 4	Not set	yhart	yhart	Jun 19, 2019
WS4811728	sha 19Jun19 4:11pm SM-15944	Jorand of Hawaii	nikita002	nikita002	Jun 19, 2019
WS4811366	yh 14c 3	Not set	Customer Support Admin	Customer Support Admin	
WS4810997	190619_Hotel71_01	HOTEL 71 CHICAGO	Peter04 Wohlsen	Peter04 Wohlsen	
WS4810092	yh 14 d	UT SOUTHWESTRN MEDICAL CTR	yhart	yhart	
WS4810035	yh 14 d	ROBERT WALTERS (SINGAPORE) PTE LTD	yhart	yhart	

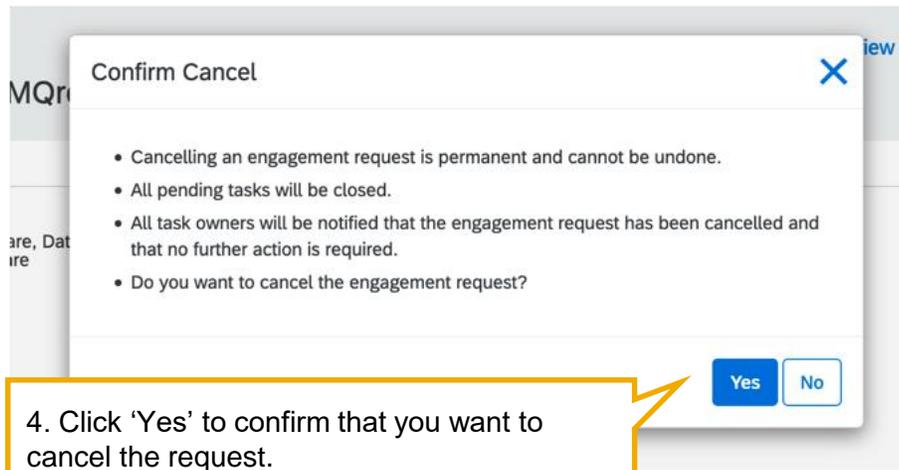
3. In the upper right corner of the engagement page, choose Action > Cancel Request. A confirmation message reminds you that tasks will be closed.

## Feature at a Glance

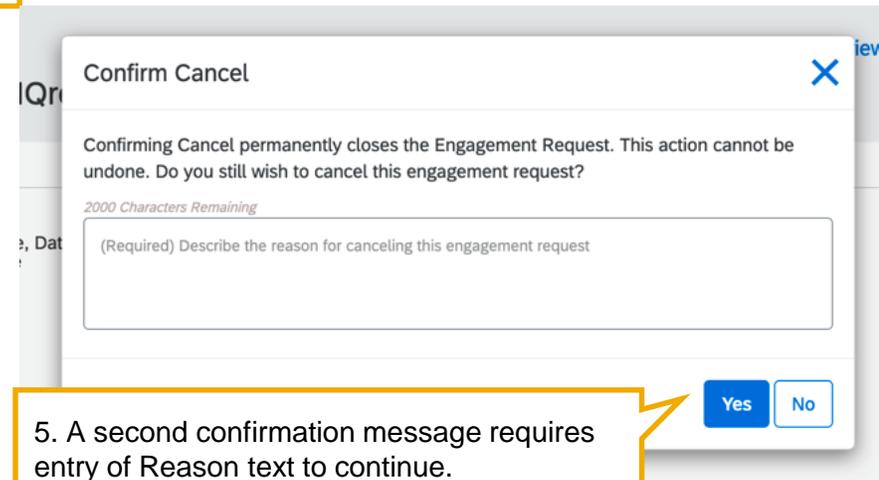
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## How to cancel an engagement request for a control-based engagement risk assessment

Canceling an engagement request cannot be undone. Therefore it is a two step process that requires comment from the user canceling the request.



4. Click 'Yes' to confirm that you want to cancel the request.



5. A second confirmation message requires entry of Reason text to continue.

ID	Name	Supplier	Owner	Requested by	Requested on	Status	Assessments
WS4811801	190619_Hotel71demo_02	HOTEL 71 CHICAGO	Peter04 Wohlsen	Peter04 Wohlsen	Jun 19, 2019	Request Cancelled	Expand

6. The control-based engagement risk assessment project is now in Request Canceled status. You can view it on the Completed tile of the Engagement Requests area.

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**How to cancel an engagement request for a control-based engagement risk assessment**

Tasks (6) | Withdrawn (1)

Pending tasks (3) Completed tasks (3) **Withdrawn Tasks (0)**

Name	Status	Completed by	Start Date	End Date
Approval for Supplier Risk Engagement Project Template	Withdrawn	Project Owner	Jun 7, 2019	Jun 20, 2019

7. Pending Tasks are deactivated and displayed in the Withdrawn tasks tab on the engagement summary page...

Risk controls (5)

All Controls (5)

Engagement ID	Risk control	Control type	Control owner	Risk type	Regulator mandate	Assessment	Assignee	Completed date	Status	
WS1435902	Critical data element	Vendor	Critical Data Team	test	false	Capacity Management Policy	DecisionMaker	Jun 7, 2019	Effective	<a href="#">View</a>
WS1436357	Duplicate 2	Engagement	ITDR team	test	false	Duplicate 2	Project Owner	Jun 7, 2019	Effective	<a href="#">View</a>
WS1436357	Duplicate 1	Engagement	ITDR team	test	true	Duplicate 1	Project Owner	Jun 7, 2019	Effective	<a href="#">View</a>
WS1435902	ITDR check global	Service	ITDR team	test	false	BCM Training	Project Owner	Jun 7, 2019	Completed	<a href="#">View</a>
WS1435902	ITDR check Singapore	Service	ITDR team	test	true	Call Tree	Project Owner	Jun 7, 2019	Completed	<a href="#">View</a>

8. Any assessment evidences already received from suppliers, and any related control review decisions (Effective or Ineffective) are retained.

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Questionnaires 						
Title	ID	End Time ↓	Commodity	Regions	Organization Name	Status
▼ Status: Completed (3)						
Call Tree	Doc1512144	6/12/2019 10:51 AM	(no value)	(no value)	Stanley Industrial & Automotive, LLC	Cancelled
BCM Training	Doc1512134	6/12/2019 10:51 AM	(no value)	(no value)	Stanley Industrial & Automotive, LLC	Cancelled
GDPR assessment	Doc1511690	6/12/2019 10:51 AM	(no value)	(no value)	Stanley Industrial & Automotive, LLC	Cancelled
▼ Status: Open (1)						
Capacity Management Policy	Doc1511700	7/12/2019 10:08 AM	(no value)	(no value)	Stanley Industrial & Automotive, LLC	NotResponded

9. For assessments pending with a supplier: If the canceled engagement request was the only one for which the assessment was needed, it is deactivated and the supplier can no longer submit a response. If the assessment is still required for an engagement request other than the one being canceled, the supplier can still submit evidence for that assessment

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## User Interface Changes Summary

Feature	Area	Changes
Engagement request editing pages	All pages	The Cancel button is removed. A new Revert Edit button allows you to undo all changes made since the request entered In Edit status.
Engagement request editing: Review page	Business details and inherent risk screening	Rows with values changed during the edit are highlighted. New columns compare the Original and Current values.
	Supplier	If the supplier selection changed as part of the edit, this area shows tiles for the original and the current supplier.
	Risk controls	If changes made to the request affected the relevant risk controls, a highlighted message above the title of this area indicates the number of controls added and removed.
	Risk assessments	If changes made to the request affected the relevant risk assessments, a highlighted message above the title of this area indicates the number of assessments added and removed.
Engagement summary page	Engagement summary	Status field: when an engagement request has a status of In Edit, the username currently editing the request is displayed.
	Tasks	As a result of changes made during editing, previously completed tasks may no longer be relevant to the engagement request. Such tasks are listed in a Withdrawn Tasks tab.