



# Feature at a Glance

## Enhancements to engagement task management

Peter Wohlsen, SAP Ariba  
Target GA: February, 2020

CONFIDENTIAL

## Feature at a Glance

Ease of implementation

● High touch

Geographic relevance

● Global

# Introducing: Enhancements to engagement task management

## Customer challenge

The owner of control review tasks and To Do tasks on questionnaires are typically project groups that represent groups of people who can potentially complete the tasks. However, it is often desirable to have specific individuals complete these tasks in specific engagement projects, with the flexibility to assign and reassign tasks. Additionally, a user needs to know which tasks they are to perform and when these tasks are due to properly prioritize work.

## Meet that challenge with SAP Ariba

This feature introduces the ability to assign “to do” survey tasks and control review tasks to an individual user or for the user to return the task to the group. The engagement list page provides a new column showing the number of tasks assigned to the user or accessible to the user as part of the group linking to the new task list view.

The task view shows the specific tasks within the engagement the user can access either as the specific owner of the task or as a member of the assigned group. Actions to open or assign the tasks can be taken from the task list view.

## Experience key benefits

Users can easily find engagements that require task actions either specifically assigned to them or accessible as the member of a group assigned a task as well as see tasks that are due soon.

The task list view provides an easy way for task owners and group members to manage tasks assigned to the specific user or group by surfacing the assigning, claiming, reassigning or returning of tasks to the group actions outside of the engagement view.

Tasks can also be opened from the task view where the same assigning actions can be accessed or the task can be performed.

## Solution area

SAP Ariba Supplier Risk

## Implementation information

To have this feature enabled, please have your Designated Support Contact (DSC) submit a **Service Request (SR)**.

## Prerequisites and Restrictions

Control-based engagement risk assessment projects must be enabled in your site.

See the additional prerequisites that impact which users can assign or reassign tasks.

# Feature at a Glance

## Introducing: Enhancements to engagement task management

**Detailed feature information:** This feature introduces the following new buttons to the details pages for To Do tasks on questionnaires and control review tasks in engagement risk assessment projects: **assign** and **assign to me**. These buttons open new popups that allow you to assign the task to yourself (for Assign to me) or assign or reassign the task to another member of the project group or the project group itself (for Assign) and add a comment explaining the assignment.

**Assign:** Click to assign or reassign the current task to either another individual member of the project group that owns the task or, if the task is currently assigned to the user, back to the entire project group. This button always shows.

**Assign to me:** User can click to assign a previously unassigned task to themselves. This button shows when the task is unassigned.

If a task is not currently assigned to an individual user, it can be assigned to another member of the project group that owns the task. If the task is assigned to the user, it can be reassigned or returned to the original owner group.

**SAP Ariba Interface Details:**

The screenshot shows the SAP Ariba interface with the following elements:

- Header:** SAP Ariba, Acting as: sharada(Stop), Customize, Recent, Manage, Create.
- Navigation:** HOME, SOURCING, SUPPLIER RISK, MORE...
- Engagement Task Detail:**
  - Engagement request: WS1512151
  - Engagement Title: 190612\_questionMath\_01
  - Task Title: To Do for Post Project Doc
  - Requester: Peter01
  - Owner: Peter01
  - Requested on: Jun 12, 2019
- Buttons:** Assign, Assign to me, Done, Ineffective, Effective, Create issue.
- Services Table:**

| Service ID | Service name         | Status | Modified at |
|------------|----------------------|--------|-------------|
| 43232307   | Data mining software |        | Feb 8, 2019 |

**Assign task Popup:**

|                          | Name          | Email                                      | Username   |
|--------------------------|---------------|--|------------|
| <input type="checkbox"/> | Project Owner | Group                                      | PG1512153  |
| <input type="checkbox"/> | RadEng        | radha.v01@sap.com                          | RadEng     |
| <input type="checkbox"/> | Peter03       | peter.wohlsen+dev3_s4All-5_Peter03@sap.com | Peter03    |
| <input type="checkbox"/> | yhreq         | ya-shih.hart@sap.com                       | yhreq      |
| <input type="checkbox"/> | sharadareq    | sharada.gurram@sap.com                     | sharadareq |
| <input type="checkbox"/> | sharadaA      | sharada.gurram@sap.com                     | sharadaA   |

Assign this task to an individual in your project group or to the entire group for action or reassign it to the entire group so that other members can assign it.

2000 Characters Remaining

(Optional) Enter the reason for this assignment

Buttons: First, <, >, Last, Viewing: 1/1, OK, Cancel.

# Feature at a Glance


## Introducing: Enhancements to engagement task management

### Detailed feature information:

Inherent Risk and Residual Risk columns show the engagement risk assessment project's risk level on the list page

Task count numbers link directly to the "My Tasks" or "Group Tasks" tab on the Task List view

Warning icon appears if the engagement risk assessment project has tasks "Due within 7 days" and links directly to the "Due within 7 days" tab on the Task List view.

| Engagement requests (53)                                |                              |                                 |           |              |              |  |               |               |   |
|---|------------------------------|---------------------------------|-----------|--------------|--------------|--|---------------|---------------|---|
| New requests (17) In progress (30) Completed (6) Export |                              |                                 |           |              |              |  |               |               |   |
| ID  | Name                         | Supplier                        | Owner     | Requested by | Requested on | Status   | Inherent risk | Residual risk | My tasks/Group tasks  |
| WS3433635   | <a href="#">Rad02_Dec09</a>  | DECISIVE TESTING INC.           | Rad_Mang3 | Rad_Mang3    | Dec 9, 2019  | Evidence Collection Phase - In Progress                  | 0             | 0             | <a href="#">4 / 5</a>  |
| WS3433676   | <a href="#">Rad01_Dec09</a>  | JACK BORENSTEIN                 | Rad_Mang3 | Rad_Mang3    | Dec 9, 2019  | Request Approval Phase - In Progress                     | 0             | 0             | <a href="#">0 / 3</a>   |
| WS3364118   | <a href="#">Rad2_Nov27</a>   | QUESTRON DISTRIBUTION LOGISTICS | Rad_Mang3 | Rad_Mang3    | Nov 27, 2019 | Risk Control Effectiveness Review Phase - In Progress    | 0             | 0             | <a href="#">3 / 5</a>   |
| WS3354566   | <a href="#">Rad002_Nov26</a> | Watts Regulator Co.             | Rad_Mang3 | Rad_Mang3    | Nov 26, 2019 | Trigger Evidence and Control Process Phase - In Progress | 0             | 0             | <a href="#">3 / 6</a>   |

# Feature at a Glance

## Introducing: Enhancements to engagement task management

### Detailed feature information:

List icon returns the user to the engagement list page

Go to engagement details links to the engagement summary page in the project workspace

Engagement risk assessment project details

Tasks are listed based on ownership – if assigned to the user or assigned to the group that the user is in.

Tasks in the “Due within 7 days” tab can be both assigned to the user or group.

Task name, type, status, owner and due date are displayed

Action menu opens actions available to the user depending on the status of the task (view vs. start) and task assigning actions if available.

Control review and To Do tasks can be assigned by a group member to another group member or claimed by a user in the group thereby moving the task into the My tasks tab.

Tasks assigned to a user can be reassigned by that user to another user in the group or returned to the group thereby moving the task back to the Group tasks tab.

Single actions are shown with a button directing the user to the available action

The screenshot shows a web interface for engagement task management. At the top, there's a breadcrumb '190612\_questionMath\_01' and a link 'Go to engagement details'. Below this is a summary card with fields: Owner (Peter01), Requester (Peter01), Requested on (Jun 12, 2019), ID (WS1512151), Region (All), Department, Commodity (Data base user interface and query software, Data base reporting software), and Supplier (WIPRO LIMITED). The main section is titled 'Tasks (26)' and has tabs: 'Due within 7 days (0)', 'My tasks (4)', 'Group tasks (9)', and 'Completed (13)'. The 'Group tasks (9)' tab is active. It displays a table with columns: Task name, Type, Status, Owner, Due date, and Action. The table lists several tasks, including 'Approval for Post Project Doc', 'To Do for Post Project Doc', 'Approval for Supplier Risk Engagement Project Template', 'Duplicate 1 Control Review', 'ITDR check Singapore Control Review', 'Duplicate 2 Control Review', 'Critical data element Control Review', and 'ITDR check global Control Review'. An action menu is open for the 'Approval for Supplier Risk Engagement Project Template' task, showing options: 'Assign', 'Assign to me', and 'View this task'. Below the table, there are buttons for 'View this task' and 'Start this task' for various tasks.

| Task name  | Type     | Status   | Owner         | Due date | Action                               |
|--|----------|----------|---------------|----------|--------------------------------------|
| Approval for Post Project Doc                          | Approval | InActive | Project Owner |          |                                      |
| To Do for Post Project Doc                             | Todo     | InActive | Project Owner |          |                                      |
| Approval for Supplier Risk Engagement Project Template | Approval | InActive | Project Owner |          | Assign, Assign to me, View this task |
| Duplicate 1 Control Review                             | External | InActive | Project Owner |          | View this task                       |
| ITDR check Singapore Control Review                    | External | Active   | Project Owner |          | Start this task                      |
| Duplicate 2 Control Review                             | External | InActive | Project Owner |          | View this task                       |
| Critical data element Control Review                   | External | Active   | DecisionMaker |          | Start this task                      |
| ITDR check global Control Review                       | External | Active   | Project Owner |          | Start this task                      |

# Additional Prerequisites

To assign or reassign a control review or supplemental engagement questionnaire To Do task, you must be a decision maker for the control (for control review tasks) or a task owner (for To Do tasks) or a member of the Supplier Risk Engagement Governance Analyst group.

To be eligible to be assigned a control review task, you must be a member of the project group defined as its decision maker. To be eligible to be assigned a questionnaire To Do task, you must be a member of the project group that owns the task.

Currently, task assignment is only supported for control review tasks and To Do tasks on questionnaires in the engagement project.