



SAP Ariba 

Feature at a Glance

New Modular Process framework for Qualification and custom supplier lifecycle processes

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Feature at a Glance

Ease of implementation  High Touch
Geographic relevance  Global

Introducing: **New Modular Process framework for Qualification and custom supplier lifecycle processes**

Customer challenge

SLP currently has a fixed set of lifecycle processes (registration, qualification, preferred), each with a single configurable template. Lifecycle processes could vary based on process type, and additionally by various commodity, region and department distinctions.

Current lifecycles result in a binary yes/no result, but data collection and qualification processes might require a more nuanced final state.

Lastly, data collected in one questionnaire cannot be reused in another process, resulting in suppliers potentially having to provide data multiple times.

Solution area

SAP Ariba Supplier Lifecycle and Performance (SLP)
SAP Ariba Strategic Sourcing Suite

Meet that challenge with SAP Ariba

Process projects provide a flexible, repeatable framework for creating different supplier management processes for different types of suppliers using different combinations of modular supplier management questionnaires.

Process projects allow you to tailor questionnaire content to specific suppliers, to leverage and reuse modular questionnaires across different processes, and to create custom processes for your specific supplier lifecycle activities.

Implementation information

This feature is ready for immediate use for all customers with the applicable solutions but requires **customer enablement** steps.

Experience key benefits

Significantly increased flexibility when using modular questionnaires for both qualification and other data collection activities

Unleash configuration creativity across all lifecycles – leverage process framework to address data collection inefficiencies by using multiple process types, internal and external questionnaires, and questionnaire reuse

Prerequisites and Restrictions

Process Framework is a complex feature set and related configuration. See slide in this deck for restrictions overview. Please refer to the documentation for a comprehensive listing of prerequisites and restrictions.

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The screenshot shows the SAP Qualifications interface. On the left is a navigation menu for 'Alpha Services' with a 'Processes' link highlighted by a yellow circle with the number 1. The main area is titled 'Qualifications' and has a '+4' badge in the top right corner. Below the title are tabs for 'Process qualifications' and 'Legacy qualifications'. A search bar with a magnifying glass icon and a 'Filter' button is present, with a yellow circle and the number 2 highlighting the search bar. The interface is divided into two sections: 'Internal Qualification' and 'TFMC - Indirect Qualification'. The 'Internal Qualification' table has columns for CATEGORY, REGION, BUSINESS UNIT, STATUS, OWNER, and EFFECTIVE DATE. It contains one row for 'Building and Construction and Maintenance Services' with a yellow circle and the number 3 highlighting the 'Internal Qualification' status. An action menu for this row shows 'View' and 'Renew' options, with a yellow circle and the number 5 highlighting the 'Renew' option. The 'TFMC - Indirect Qualification' table also has the same columns and contains two rows: 'Apparel and Luggage and Personal Care Products' and 'Mining and Well Drilling Machinery and Accessories'.

1. “Qualifications” available on the 360 as before. New “Processes” link for customer defined processes.
2. Legacy qualification activities (if any) are maintained in a separate area from the new process-based qualifications. **See documentation for more details for how legacy qualification transitions are handled.
3. Processes are grouped by Process Type, with matrix selections and qualification status at the ready. Now able to search and filter across projects.
4. Initiate a new qualification process
5. Action-based menus depending on status.

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The screenshot displays the 'Create a process' interface for a 'PB Indirect Qualification Project'. It is marked as 'Not Started'. The interface is divided into several sections:

- Process Summary (1):** Shows the process name 'PB Indirect Qualification Project', a 'Not Started' status, and key details: Supplier (ACME SUPPLIER, Vendor ID S12111351), Process Type (PB Indirect Qualification), Process Owner (Balachandar), and Matrix (Category: All Commodities, Region: All, Business unit).
- Applicable questionnaires (2):** A section for 'Newly assigned' questionnaires, currently empty.
- Reusable Questionnaires (3):** A table listing reusable questionnaires with columns for Questionnaire Name, Status, Expiry Date, Score, and Request Updates.

QUESTIONNAIRENAME	STATUS	EXPIRY DATE	SCORE	REQUEST UPDATES
<input checked="" type="checkbox"/> Optional Indirect Qualification for US ReUseTrue for ACME SUPPLIER - optional	Approved		-	<input type="checkbox"/>
<input checked="" type="checkbox"/> Mandatory Indirect Qualification for US ReUseTrue with Phase for ACME SUPPLIER	Approved		-	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Internal Indirect Qualification for US ReUseTrue for ACME SUPPLIER - optional	NotResponded		-	<input type="checkbox"/>
<input checked="" type="checkbox"/> PB NA & APAC Specific Questions for ACME SUPPLIER - optional	Expired	29/08/2019	-	<input checked="" type="checkbox"/>

1. Process creation summary includes process type and matrix details
2. Questionnaires that are dynamically assigned to the process
3. Reusable modular questionnaires with status and expiration details
4. Ability to request updates to force attention on a particular questionnaire, even if already answered and active

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Internal Qualification **1** Pending Decision

Supplier: Electricians Bright Idea
Vendor ID S28434704

Process Type: Internal Qualification

Process Owner: Courtney Rome
Started 4 weeks ago

Matrix: Category: All Commodities
Category ID: All
Region: All
Region ID: All
Business unit

Process status **2**
Required tasks have been completed. The process status is pending.
Make decision

Set process status **3**

Internally Qualified
 Conditionally Approved
 Internal Qualification Denied

Leave comment
Enter a comment of up to 255 characters about your status decision (required)

1. Process level decision above and above individual questionnaire approval workflow
2. Process details including intake form and all related questionnaires are accessible to decision maker
3. Process statuses can be customized text values as well as non-binary. “Conditionally approved” is now available as an outcome.

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Process Framework Key Features

Flexible lifecycle Framework

- Instead of using one process for all suppliers, you can tailor multiple different processes to specific circumstances and for specific types of suppliers using collections of modular questionnaires.
- Define custom statuses for your process projects, allowing you to use your organization's terminology and reflect more nuanced outcomes

Process-based Qualification

- Process projects are a new alternative to legacy supplier qualification projects. Each process project includes a dynamically generated list of available modular questionnaires based on the commodities, regions, and departments selected in the process project intake form, eliminating the need to construct a complicated set of questionnaire segment content documents

Custom (miscellaneous) Processes

- You can create processes tailored to your organization's specific supplier lifecycle. Miscellaneous processes don't need to match the standard SAP Ariba lifecycle stage names, and you can tailor them to your organization's needs.

Internal & External MQs

- Process projects can collect information from both internal recipients in internal modular questionnaires (new), and supplier contacts in external (supplier-facing) modular questionnaires (existing). Internal modular questionnaires are only supported in process projects.

Streamlined data collection

- Reuse a questionnaire in multiple processes. Once you collect information in a modular questionnaire, you don't need to ask recipients to respond again, and it doesn't need to be re-evaluated and reapproved for each new process where it's included (if it has not expired). Alternatively, you may request updates for reused questionnaires manually on a per-process basis, allowing you to tailor update request requirements to the specific questionnaire and help ensure information in reused questionnaires is current.

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Elements of Process Framework Projects

Process framework projects combine a project template that has some specialized functionality with other elements such as site master data and modular questionnaires to create a workflow. To set up a supplier lifecycle process project, you must understand these elements and their relationships to one another.

Element	Description
Custom process types	You define your own types of supplier management processes by importing process type master data in CSV files. When you define a process type, you specify its lifecycle type, which can be a miscellaneous process that is unique to your organization or a qualification process that is mapped to the SAP Ariba qualification stage of the supplier lifecycle.
Custom process statuses	You define your own process statuses by importing process status master data in CSV files. You define a set of custom statuses for each process type you use. The display names you define for these statuses can match your organization's specific business processes and terminology.
SM Process Project project type	You use this project type to create templates for supplier management process projects . Like modular questionnaire project templates, you can create multiple SM Process Project templates to define different processes, assigning each template a different process type.
Process intake form	The survey document in a process project template defines the form that process project initiators fill out to create a project from the template. Answers to questions you create in the intake fork determine which of the modular questionnaires that are referenced in the process project template are included in individual process project.
External tasks	You create specialized external tasks in process project templates to add modular questionnaires to the process .
Process initiator and decision-maker project groups	You use specialized project groups to assign specific users the ability to create or make status decisions for specific process projects. These project groups provide a finer degree of control over responsibility for individual processes than global user group membership.

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Process Type

Process Types define various named processes that are mapped to a core supplier lifecycle. Each process type has one and only one template. For the 2111 release we are providing the following two core types:

- **Qualification:** Maps/Replaces the legacy qualification lifecycle. Can be initiated, managed, or viewed on the **Qualification** tab of the 360° profile.
- **Miscellaneous:** Miscellaneous process types are customer-defined and standalone processes, and as such maps to no legacy lifecycle stage. Can be initiated from the **Processes** area of the 360° profile.

Use the **Import SM Process Types** data import task to import the SMProcessFlowType.csv file:

AribaLifeCycle	The core lifecycle for the process type – as of 2108 release either Qualification or Miscellaneous
Description	A free text description of your process type
Name	Process Type name shown in the Process Type dropdown menu in various places locations in the UX
UniqueName	The unique ID of the process type

	A	B	C	D
1	AribaLifeCycle	Description	Name	UniqueName
2	Qualification	Direct Supplier Qualification	Direct Supplier Qualification	DirectQualification
3	Qualification	Indirect Supplier Qualification	Indirect Supplier Qualification	IndirectQualification
4	Qualification	Internal-only qualification process to be completed prior to suppliers being designated as preferred suppliers	Internal Qualification	InternalQualification
5	Miscellaneous	Pre-Qualification	Pre Qualification Vetting	PreQualification
6	Miscellaneous	Supplier must complete pre-registration before we collect their information to be setup in our transactional system	Pre-Registration	PreRegistration
7	Qualification	Standard supplier qualification process	Qualification	StandardQualification
8	Miscellaneous	Supplier Due-Dilligence process	Supplier Due-Dilligence	DueDilligence

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Process Status

All supplier management projects have an underlying project state, but process framework states *are not automatically associated* with statuses. You must define statuses for them using the SMResourceStatus.csv data import.

- For example, if you have a miscellaneous process type called Compliance, you can define a status of Compliant for Approved state, Non Compliant for Denied state, and Partially Compliant for ConditionallyApproved state

Process Framework statuses are linked to legacy qualification statuses so that important functionality is automatically applied, including:

- Eligibility criteria for invitations to sourcing events
- Ability to start a preferred supplier management project once a qualification process project has an approved status

Use the **Import SM Process Types** data import task to import SMResourceStatus.csv file

Description	A free text description of the process status
Name	The name of the process status that will display in the user interface
UniqueName	A unique ID for the process status
ProcessType.UniqueName	The underlying project state to which the status applies
ProjectStatus	The underlying core project state to which the status applies (see next slide)

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Making a Decision

Unlike other supplier management projects, when all the tasks related to its constituent questionnaires are completed the status of a process project can be set either automatically based on a preset business rule or manually, a decision maker reviews the process and its questionnaires before setting its desired end status.

Instead, a decision maker reviews the process and its questionnaires before setting its status.

This status is not permanent. A decision maker can edit it at any time.

- For example, if an critical questionnaire in a qualification project is expiring and the supplier has not updated it yet, a decision maker for that process might update its status from **Approved** to **Conditionally approved**.
- If the supplier allows the questionnaire to expire without updating it, a decision maker might update the process status again to change it from **Conditionally approved** to **Denied**.

Comments allow decision makers to describe why they made a particular decision, and a table of previous decisions and those comments allow all of the members of the project Decision Maker team to track those changes and the reasons behind them.

The supplier primary contact and all members of the process Decision Maker group receive notifications about the status change.

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API Considerations

In addition to the existing SLP APIs, the following considerations are made to support process framework

Qualification Data export

- Existing supplier data API updated with Process Type
- /vendorDataRequests/ output format

```
"qualifications": [  
  {  
    "Qualification Status": "Qualified",  
    "Preferred Status": "",  
    "Category": "53",  
    "Region": "USA",  
    "Business Unit": null,  
    "Process Type": "Data Unit"  
  }  
]
```

Intake Form added to API

- MQ external approval API 'Get Workspace Details' now includes intake form document ID
- Intake form details can be exported using the Intake form document ID via Get Document Details API
- Example output:
 "entityType": "RFXDocument",
 "projectItemType": "Document",
 "isProcessIntakeForm": true,
 "format": "Questionnaire",
 "title": "ProcessFlow",
 "version": "v1",
 "aribaType": "ariba.sourcing.rfx.RFXDocument",
 "workspaceTitle": "ProcessFlow Template for Anti Bribe Compliance",
 "id": "Doc13138903",

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Restrictions

Process Framework is a complex feature set and related configuration. Please refer to the documentation for a comprehensive listing of prerequisites and restrictions. In this feature at a glance we will highlight three major restriction considerations.

Migration from Legacy Qualification Projects

- There is no way to migrate data from questionnaires in legacy, dedicated qualification projects to the modular supplier management questionnaires used in qualification process projects. Requalification based on legacy qualifications use the new qualification process projects that do not include any data from the previous qualification, therefore recipients must submit new process-based modular questionnaires to requalify.
- The questionnaire import in SM Administration does not support importing data into modular questionnaires and cannot be used to migrate qualification data from legacy qualification questionnaires or external systems into process-related modular questionnaires.

Template Upgrade

- Template upgrade for process projects is not currently supported. However, template upgrade for the modular questionnaire projects used in process projects is available.

Integration

- Synchronization of data in mapped questions in modular questionnaires to an integrated ERP system is not currently verified or certified by SAP Ariba.
- Synchronization of data from the process intake form to an integrated ERP system isn't supported.
- If your integration configuration specifies automatic integration of new suppliers based on qualification status, process qualification status works the same way as legacy qualification status to trigger initial synchronization to the ERP system.

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