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Strategic Sourcing Support Webcast Series

SM Template Upgrade

**GENERAL QUESTIONS
 *Q: Who can perform template upgrade***

A: To perform template upgrade user must be part of SM Ops administration group

***Q: When and why template upgrade is required?***

***A:*** Template upgrade is used when you have updated your registration template or MQ. Changes are not automatically applied to suppliers that were invited to register before the template is updated, so you need to use template upgrade to push those changes.

**Q: Which supplier projects are eligible for template upgrade?**

Supplier registration status should be

• Invited
• In Registration
• Denied

Supplier registration Update status should be

• Approved

Modular Questionnaire status should be

• Not Responded
• Denied
• Expiring
• Expired

Note: When the registration and MQ status is in pending resubmit, pending approval or not invited, any task in approval is not eligible for upgrade.

***Q: I ran the template upgrade, but why project is not upgraded successfully?***

You can access the download summary under template upgrade status screen to see the failures. Below are common failures which can be resolved without an SR.

• SM update status failed - Supplier will be active in Sourcing and inactive in SM Side. Make sure suppliers are active at both Sourcing and SM side.

• No matching external questionnaires, maybe its deleted, check the template - There will be no document for external registration questionnaire, and this is invalid. Template upgrade cannot be performed for such suppliers.

• Unable to reach MDS or invalid code specified - This is because the registration projects will be having inactive commodity or region or department. Either remove the invalid code or activate the invalid code and re-run the template upgrade.

***Q: How can I check if a template upgrade is stuck in Supplier Management?***

A: Expand Template Upgrade job which is running and check Last Updated date and Estimated Completion. If this date is multiple days behind current date but the upgrade still shows In Progress, there may be an issue and you can log an SR with Ariba.

***Q. Why email notification was not sent to supplier after template upgrade?***

*A*. Below are the two possible causes:

• Notification email will not be sent to supplier when the supplier registration status is Invited.

• Notification email will not be sent to supplier when the modular questionnaire status is Not responded.

***Q. Why did not my supplier's ERP profile not update, even after upgrading the supplier registration template?***

*A*. This is expected behavior. Using the template upgrade feature will not push new field values to the ERP Profile of a supplier. In order for a sync to happen, the supplier must submit an update to their Registration Questionnaire. After the task flow has been completed, the field mappings will sync to the ERP Profile.

***Q: How will the newly added task in new phase will appear for the already registered supplier?***

A: The task will appear as not started for the already registered supplier and user will not be able to complete the task from new phase once it is registered.

***Q: Is there a limit in upgrading the suppliers?***

A: No, there is no limit in upgrading the suppliers. However, when there are a greater number of suppliers which are to be upgraded it will run for days and there are chances that it can time out or servers will be restarted during release days. So, Ariba recommends upgrading outside release days and business hours when there are a greater number of suppliers.

***Q: How to use the latest template of the qualification template?***

*A*. Template upgrade is not applicable to qualification. The qualification will be based on the template version when it was created and won't be the latest version during re-qualification as same project questionnaire would be reopened.

Another workaround is, If you want to send the latest version, requalify and the status will move to qualification started. Once the status is qualification started then you can cancel the qualification under Manage > SM Administration > Cancel qualification. Once it is cancelled, the qualification entry will be removed from UI and then you can start a new qualification using latest version of template.

***Q: Will supplier know about template upgrade?***

A: It is possible to notify suppliers about a template upgrade. An option will appear while initiating the upgrade allowing you to notify the suppliers that will be upgraded that there are changes to their questionnaire.

***Q: It seems the template upgrade is only applicable for Supplier registraiton. Do we have similar feature for Supplier request ?***

A: We do not have template upgrade for supplier request at this time, only for Registration and Modular Questionnaire. If you want to request this, please submit an Improvement Request.

***Q: Which is the normal rate of upgrade (how many suppliers are upgraded per hour)?***

A: There is no defined rate as the process depends on several factors such as server availability, template data, questionnaire data, validations, etc.

***Q: Will inactive suppliers be eligible for template upgrade?***

A: No if the supplier is inactive at SM and Sourcing side, that supplier won’t be eligible for template upgrade.

***Q: Can you have multiple registration templates to keep consistency based on market specifications?***

A: You can only have a single registration template at this time. However, you can have multiple questionnaires within the single template and mark them as optional so a user initiating the registration can select which external questionnaire to be sent to the supplier.

***Q: How to view the audit trail? If the Registration / MQ template is updated and it includes completed projects, do we still lose all history of the original approvals and approver comments?***

A: Project owner or internal user can access the respective questionnaire version by selecting the template version from drop down under registration tab and then user can select the questionnaire to see the responses submitted. Approval comments will be copied from previous version to latest version. Same way project owner can check the history of audit activities in advanced view by accessing previous project and latest project links. More details can be found under feature documentation of SM-15932

***Q: In MQs, can we use Template upgrade to update the approval flow?***

A: Yes, you can update the approval flow. Make sure Modular Questionnaire status should be Not Responded, Denied, Expiring or Expired. Note: When the registration and MQ status is in Pending resubmit, Pending approval, and Not invited any task is in approval is not eligible for upgrade.

***Q: Can we see the exact projects we are upgrading? Also, can we select a particular project to be updated and others not - or is it just upgrade all in one version?***

A: There is no report to get the list of eligible projects. You can see the upgraded suppliers in Download Summary after upgrade is done. You cannot do template upgrade for single supplier. It is for all supplier from old version to latest version. We would suggest you log an Improvement Request with the business use case and impact in influence tool.

***Q: Is there an option to extract a list of the projects with supplier details that are not eligible for modular questionnaires?***

No, there is no option currently to fetch or export the list of eligible or non-eligible suppliers. There is an improvement request in influence, you can upvote if this functionality helps usability.

***Q: Is it possible to withdraw questionnaires if you have requested further information from the supplier?***

If the status is pending you can always cancel the registration project and invite with latest version of template.

**Q: *If I move a question from Questionnaire A to Questionnaire B with same XML mapping, will this lead to data loss?***

***A:*** You cannot move a question from one questionnaire to another, you have to delete one to add another. This will change the KI-ID and have data loss in questionnaire.

***Q: If you "edit" a question, will supplier’s reply to the previous version of the question be lost or not?***

***A:*** Unless you modify mapping or answer type, data will not change from previous template version.

***Q: Will there be a data loss when value list for existing question is updated ?***

***A:*** Yes, there will be a data loss when you remove or add the list of choices or when you change the question attribute from single select to multi select or vice-versa. It is always recommended to verify in test realm before moving the change to production.

***Q: How can I avoid template upgrade for the projects, which are registered but not integrated with ERP?***

***A:*** There is no way to skip or select specific suppliers while template upgrade. It will upgrade all the eligible projects in that one particular version which you are trying to upgrade.

***Q: In the case of supplier registration, does data loss mean that the next time the supplier has to update their registration, they may have to fill in some fields again?***

***A:*** Yes, the response to the question would be lost for the question which would have a change in KI\_Id once template is upgraded. Supplier or Internal would need to fill the response again.

***Q: Is there an option to revoke to the last version if some issue occurs in production?***

***A:*** No in the current design functionality we cannot revert once template is upgraded and we cannot cancel the template upgrade if it is In-progress as well.

***Q: How to list the suppliers which we can't upgrade the template version?***

***A:*** No, there is no option currently to fetch or export the list of eligible or non eligible suppliers. There is an improvement request in influence and you can upvote if this functionality helps usability.

***Q: How can we edit the KI\_ID?***

***A:*** No, KI ID for each question is auto generated when the questions are created and it cannot be changed through import. If you delete the question in latest version, its KI\_ID will get deleted and a new KI\_ID will get added even if you add the same question.

***Q: Can we skip versions and upgrade to the latest template version. For e.g., I have supplier having 24V, and current template version is 26V. So, can I skip 25V for that supplier and go to 26V directly?***

***A:*** Template upgrade will always upgrade to the latest version. So, if you are upgrading supplier in v24, and the current template version is v26, the only option that is available is to upgrade to v26.

***Q: Can i upgrade the attachment in the template?***

***A:*** If the response contains attachment and when the project is upgraded, the attachment will also be copied to the latest version.

***Q: Do we need to enable the feature through SR?***

***A:*** This feature is enabled by default for everyone.

***Q: Regarding update of Modular questionnaire which contains certifcate, if a certificate question is modified, the old certificate should still appear in Certificate in Supplier profil 360° or not?***

***A:*** If the certificate question was not deleted and then template upgrade is carried, then the certificate should still appear in supplier 360. But when supplier updates the expired certificate to valid certificate for the same question, the expired certificate will be removed and replaced with valid certificate.

***Q: Does data loss mean that the initially submitted response of the vendors cannot be retrieved in any way?***

***A:*** Yes, if there is a data loss after template upgrade there is no way to retrieve the response. Supplier will have to resubmit the responses if there's any data loss

***Q: If field mapping is changed, will there be a data loss ?***

***A:*** No if the field mapping is changed, there won’t be a data loss. But the answer already stored against old field mapping will not be removed and answer will not be updated to new field mapping as well. In order to reflect the answer to new field mapping supplier should revise response and buyer should approve the task.

***Q: Can we keep the previous response before the template upgrade?***

***A:*** You can make use of API to fetch the questionnaire responses, or you can export the response for each supplier manually by using export option and keep it as backup.

***Q: If our templates exist in different languages, would info message be available in all the languages too?***

***A:*** The warnings and error messages are localized and would appear based on user's locale.

***Q: Will the updated questionnaire go through approval process again?***

***A:*** If the supplier is already registered and when next time supplier log in, they have to revise response and submit the updated questionnaire. Once submitted the task will trigger provided if you have configured the task in update phase.

***Q: Is there a report option/activity log to be extracted on how many template upgrades happened and what changes were applied?***

***A:*** You can check the Download Summary for all the upgraded projects. To view the changes, you have to compare the template versions accordingly. There is no report to show the changes between versions.

***Q: How can I see or download a log to see which suppliers had template upgrades?***

***A:*** You can check the download summary for all the upgraded projects under template upgrade status screen. In the Supplier 360 profile under Registration, you can see the drop down with number of versions this particular supplier was upgraded.

***Q: Will there be an option available to apply template upgrade for the qualification questionnaire?***

***A:*** It is offered in New Process Flow qualifications but not in the legacy Supplier Qualifications

***Q: What action should be taken in no matching external questionnaire issue?***

***A:*** If you are deleting the questionnaire and creating new one with template upgrade, the questionnaire data cannot be retained.

***Q: Can we copy deleted KP ID and create a field to minimize the data loss?***

***A:*** Yes, you can avoid data loss by importing the questions with the deleted KI\_ID so that KI\_ID will match between previous version and latest version provided all other attributes remain the same.

***Q: Can suppliers also access previous versions of the questionnaire, which they have answered?***

***A:*** No, Supplier cannot see the old versions of questionnaires nor response submitted by them.

***Q: If a new question is added, will existing suppliers be required to answer this question when they log in to their account?***

***A:*** If you do template upgrade for existing suppliers, they have to provide the answer for newly added question.

***Q: After the upgrade, what's the impact to suppliers from Ariba Network supplier portal and suppliers with AribaPay enabled?***

***A:*** Template upgrade updates questionnaire content for suppliers, so they will see any changed content. It will not have impact on the Orders/Invoices section of their account.

***Q: Does the template upgrade warning show for which questions we are facing Data loss?***

***A:*** In current functionality, it does not show for which questions the data loss will occur. However, if there is a change in answer type then it displays the previous answer type and current answer type along with KI\_ID details. If there is a change in KI\_ID then user needs to export both version questionnaire and compare manually to see the difference.

***Q: If the supplier is not notified during the template upgrade, how the supplier will have the new questionnaire details?***

***A:*** When supplier log in next time to Ariba Network, the questionnaire will be the latest one which was upgraded. Suppliers have to revise response and submit.

***Q: Can we see the old supplier response in the earlier version of template?***

***A:*** Yes, on the top right of the registration there is a drop down where you can see archived versions of the previous template with any supplier responses that were on that version.