



SAP Ariba 

# Feature at a glance

## Certificate Management

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May 2018

CONFIDENTIAL



Ease of implementation



Low-touch/simple

Geographic relevance



Global

# Feature at a Glance

## Introducing: Certificate Management

### Customer challenge

Companies often require collection of large numbers of certificates across their supply base to ascertain regulatory compliance and as part of qualification processes. Buyers do not have visibility into when supplier certificates are expiring, or have expired. They have this information in different systems, and there is no automated way to notify suppliers or buyers when a certificate provided by the supplier is expiring or has expired.

### Solution area

SAP Ariba Supplier Lifecycle and Performance (SLP), SAP Ariba Supplier Information and Performance Management (SIPM) new architecture

### Meet that challenge with SAP Ariba

This feature introduces certificate management capabilities that will let Buyer have the visibility into when certain certificates expire, trigger notifications to supplier automatically, search suppliers who have certificates in various states.

### Implementation information

This feature is “off” by default. To enable this feature, please submit a Service Request for SM-6752 “Certificate Management”.

### Experience key benefits

Transparency and Visibility into supplier certificates and their status  
Improves efficiency as notifications are automatically sent to suppliers when a certificate is expiring or expired

### Prerequisites and Limitations

Prerequisite for Certificate management is to have Modular questionnaire feature enabled and configured.

# Certificate Management

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- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Supplier user flow
- ❖ Buyer user flow

# Certificate management capabilities

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- ❖ Ability to upload the predefined certificate types that supplier can choose from
- ❖ Configure expiring notification on when certificates should expire
- ❖ Enhanced supplier side experience to collect certificates
- ❖ Automatic notifications to supplier and buyer when a certificate is expiring or expired
- ❖ Central place to view all certificates of a supplier in Supplier 360
- ❖ Ability to search suppliers based on Certificate type, Certificate status (Valid, Expiring or Expired), and Expiry date
- ❖ Central place for supplier to see all Buyer specific certificates

NOTE: Prerequisite for Certificate management is to have Modular questionnaire feature enabled and configured

# Certificate management

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- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Supplier user flow
- ❖ Buyer user flow

# Enablement Instructions for Certificate management

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This feature is “off” by default. To enable this feature, please submit a Service Request to Ariba Customer Support for SM-6752 “Certificate Management”.

Customer support will:

- ❖ Enable feature toggle “Certificate management” (ID SM-6752) for customer realm
- ❖ Enable feature control “Certificate Management” in SM admin of customer realm; this will give access to Certificate Management tab in Supplier 360

Prerequisite: In order to use Certificate Management, you need to enable feature Modular Questionnaire in your realm. See 2<sup>nd</sup> section in this Knowledge Transfer document.

For this, please also submit a Service Request to Ariba Customer Support for SM-6130 “Modular Questionnaire”. Customer support will enable feature toggle “Questionnaire Management (ID SM-6130), and enable feature control “Supplier 360 Questionnaire” in SM admin, as this will give access to Questionnaire Tile in Supplier 360.

# Certificate management

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- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Supplier user flow
- ❖ Buyer user flow

# Certificate management: Step 1 – Upload Certificate type

- ❖ Certificate type is a list of all certificates that a buyer wants to collect from all of its suppliers. Certificate type can be used later for searching suppliers based on the certificate type and reporting purpose
- ❖ Upload Certificate type file in Data Import/Export – Administration section

Import	Export	Web Service Status	
Import			
<a href="#"> Refresh Status</a>			
Tasks ↑	Integration Toolkit Names	Status	Last Imported
Import Certificate Types <a href="#">(i)</a>		Completed	04/10/2018 10:58:04 AM
Import Translations for Certificate Types <a href="#">(i)</a>			<a href="#">Import</a>

# Certificate management: Step 1 – Upload Certificate type contd..

- ❖ Here is the sample certificate type file uploaded

	A	B	C	D
1	UTF-8			
2	Description	Name		UniqueName
3	Health and S	HAS		HAS
4	Halal related	Halal		Halal
5	Quality relat	ISO9000		ISO9000
6	Quality relat	ISO9001		ISO9001
7	Food related	Kosher		Kosher
8	Legal related	Legal		Legal
9	MSC Certific	MSC		MSC
10	Smal Busine	Small Business Administration		SBA
11	Women Own	WOW		WOW
12	Aviation cert	TAC 200		TAC 200
13	Aviation rela	ASA 100		ASA 100
14	Aviation rela	AS9100C		AS9100C
15	Certificate fo	National Minority Supplier Developmen		NMSDC

# Certificate management: Step 2 – Configure certificate type questions in Modular questionnaire

- ❖ In the Modular questionnaire template, configure certificate type questions
- ❖ Choose a certificate type. This is mandatory. The certificate type will be visible to the supplier when he/she provides certificate details
- ❖ Configure expiring notifications – based on the date, email will be sent to supplier when a certificate is expiring
  - For example, if you configure 6 months before the expiry date, and if a certificate expires on Dec 31 2018 On . July 1 2018 an email will be sent to supplier to upload a new certificate. The status of the certificate will be Expiring. If a new certificate is not uploaded before the expiry period, the status of the certificate will be expired
  - Notifications: Supplier user and the user who sent the questionnaire to supplier will automatically get notified. On top of it, you can choose additional people to get notified
  - If a certificate is very critical for the entire Modular questionnaire, then you can choose to set the status of questionnaire when a certificate is expiring or expired. Otherwise, you can leave the box unchecked.

The screenshot shows the configuration screen for a certificate type question. At the top, there is a rich text editor with a toolbar for bold, italic, underline, font size, and font selection. Below the editor is a text input field containing "Please provide ISO 9001 certificate".

Below the editor, there is a section titled "Translations" which contains fields for "Answer Type" (set to "Certificate"), "Response Required" (set to "Yes, Participant Required"), "Reference Documents" (with a link to "Attach a file"), "Mask Attachments" (set to "None"), "Visible to Participant" (set to "Yes"), and "Participant can add additional comments and attachments" (set to "No"). There is also a question about "Use participant-specific initial values?" with a "No" option selected.

Further down, the "Certificate Type" is set to "ISO9001". Under "Expiration schedule", there is a dropdown for "Send reminder" with the value "6" and a dropdown for "month(s)" with the value "before expiration". Three checkboxes are present under this section: "Notify primary supplier manager" (checked), "Notify project owners" (checked), and "Update status on the questionnaire when certificate is expiring or expired" (checked).

# Certificate management

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- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Supplier user flow
- ❖ Buyer user flow

# Certificate management: Supplier user answers certificate

- ❖ Supplier user provides certificate details in a Modular questionnaire

NOTE: Prerequisite is to send Modular questionnaire that has certificate questions to the supplier

The screenshot shows a modular questionnaire titled "Doc8675922 - ISO certificates questionnaire". At the top right, there is a timer indicating "Time remaining 29 days 23:57:20". Below the title, the page header says "All Content" and "Name ↑". There are two required fields listed:

- 1 Please provide ISO 9000 certificate
- 2 Please provide ISO 9001 certificate

A note at the bottom of the list states "(\*) indicates a required field". Below the list are buttons for "Submit Entire Response", "Save", "Compose Message", and "Excel Import".

A modal dialog box is open, prompting for ISO 9000 certificate details. The dialog has a title "1 Please provide ISO 9000 certificate". It contains the following fields:

- Certificate Type: ISO9000
- Issuer:
- Year of publication:
- Certificate Number:
- Certificate Location:
- Effective Date:
- Expiration Date:
- Attachment:  No file chosen  
Or drop file here
- Description:

At the bottom of the dialog are "OK" and "Cancel" buttons.

# Certificate management

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- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Supplier user flow
- ❖ Buyer user flow

# Certificate management: Buyer reviews the certificate details in the questionnaire

- ❖ Buyer user (Approver) reviews the certificate details in the questionnaire and approve or reject or request additional info

Approve ISO certificates

Supplier: Kelly technologies Category: Chemicals including Bio Chemic... Started: April 11, 2018

Contact: Swetha Beepyata swetha.beepyata@sap.com

Region: Europe

Owner: Swetha Beepyata

[Request Additional Info](#) [Deny](#) [Approve](#)

> [Process Flow](#)

Supplier questionnaire

Questionnaire	Response
1 Please provide ISO 9000 certificate	+ Certificate Type: ISO9000 Issuer: ISO Year of publication: 1995 Certificate Number: 9586867 Certificate Location: Palo Alto Effective Date: 7/1/2017 Expiration Date: 6/30/2019 <a href="#">15.1 kb Sample ISO certificate pdf.pdf</a>
2 Please provide ISO 9001 certificate	+ Certificate Type: ISO9001 Issuer: ISO Year of publication: 2000 Certificate Number: 3544234 Certificate Location: New York Effective Date: 12/1/2016 Expiration Date: 6/30/2019 <a href="#">15.13 kb Sample ISO 9001 certificate pdf.pdf</a>

# Certificate management: Central place to view all certificates provided by the supplier in supplier 360

- Under certificates tab(Supplier 360), buyer can see the list of all certificate types, status, expiry date and questionnaires (certificates were collected from)

Certificate Type	Certificate Status	Expiry Date	Questionnaire
ISO9000	Expired	Mar 31, 2018 12:00 AM	WS8353344
ISO9001	Expiring	Apr 13, 2018 12:00 AM	WS8412752
Halal	Valid	Apr 30, 2018 12:00 AM	WS8350590

# Certificate management: Search suppliers based on certificate type, status and expiry date in SLP

- ❖ Buyer user can search suppliers for whom certain certificate types are Valid, expired or expiring
- ❖ Buyer user needs to select certificate type before you can search suppliers for whom the certificate type has expiry date between **On or after** and **on or before**
- ❖ We limit up to 20 certificate types in search criteria. At any given point of time, you cannot have more than 20 certificate types to search based on different status

The screenshot shows the SAP S/4HANA Supplier Management interface. On the left, there is a sidebar with search filters for Pending Approval (Registered), Integrated with ERP (See more), Primary Supplier Manager (Search), Certificate Type (Halal, ISO9000, ISO9001), and Certificate Status (Valid, Expiring, Expired). On the right, a list of suppliers is displayed in a table format:

Supplier ID	Location	Vendor ID
RP011001	GURGAON, IN	ERP011001
RP011002	GURGAON, IN	ERP011002
RP011003	GURGAON, IN	ERP011003
RP011004	GURGAON, IN	ERP011004
RP011005	GURGAON, IN	ERP011005

At the bottom right of the table, there is a link "Show more options." with a dropdown arrow.



SAP Ariba 

# Feature at a glance

## Modular Questionnaire

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May 2018

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# Feature at a Glance

## Introducing: Modular Questionnaire

### Customer challenge

Suppliers fill out the same questionnaire again and again even if its applicable for multiple categories, regions and business units. There is no way for buyers to reuse questionnaires that are applicable for multiple categories, regions and business units

Buyers don't have the flexibility to ask suppliers to complete questionnaires on a recurring basis

No process to send additional questionnaires outside of a typical registration/qualification process

No clear way to mass send questionnaire or questionnaires to one or more multiple suppliers

### Solution area

SAP Ariba Supplier Lifecycle and Performance (SLP), SAP Ariba Supplier Information and Performance Management (SIPM) new architecture

### Meet that challenge with SAP Ariba

This feature introduces a new Modular questionnaire which provides buyers the flexibility to have standalone questionnaires, which can be applied for multiple categories, region, and Business units, and have recurrence (expiration schedule).

### Implementation information

This feature is off by default. To enable this feature, please submit a Service Request for feature SM-6130 "Questionnaire Management".

Ease of implementation

High touch

Geographic relevance

Global

### Experience key benefits

Reduce the burden on Suppliers to provide the same questionnaire again and again

Improves efficiency for the buyers to automatically send notifications to supplier when a questionnaire is expiring

Better compliance as each questionnaire can have its own approval flow.

### Prerequisites and Limitations

In this first limited release, modular questionnaire is available for supplier facing (or external) questionnaires only, in order to support the feature Certificate Management. Full release of Modular Questionnaire is planned post May GA release.

# Modular Questionnaire

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- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Buyer user flow
- ❖ Supplier user flow
- ❖ Buyer user (approver)

# Modular questionnaire capabilities

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- ❖ Modular questionnaire is a standalone questionnaire that have its own status and recurrence. For example, questionnaire can be sent to supplier every 2 years or 5 years for updated information
- ❖ Automatic notifications to supplier and buyer when a modular questionnaire is expiring or expired
- ❖ Ability to configure if a questionnaire should be Open or Closed. Open means if a questionnaire is approved, the recipient of the questionnaire can always update it.
- ❖ Configure different approval processes on questionnaire if a questionnaire is submitted for the first time or during renewal period
- ❖ Central place to view all questionnaires applicable for a given supplier in supplier 360
- ❖ Ability to send a questionnaire to one or more multiple suppliers outside of any lifecycle process
- ❖ Reuse questionnaires in various new Lifecycle processes if the same questionnaire is applicable for Multiple categories, regions, and business units – NOTE: this will be supported when we have the Enhanced registration and qualification lifecycle process in Q3 2018 (Please refer to SLP roadmap)
- ❖ Statuses supported on Modular questionnaires are: Not started, Pending submission, Pending approval, Pending resubmit, Approved, Denied, Expiring, Expired

NOTE: In the first release of the feature, we are support SUPPLIER facing ONLY.

# Modular questionnaire

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- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Buyer user flow
- ❖ Supplier user flow
- ❖ Buyer user (approver)

# Enablement Instructions for Modular Questionnaire

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This feature is “off” by default. In order to enable feature Modular Questionnaire in your realm, please also submit a Service Request to Ariba Customer Support for SM-6130 “Modular Questionnaire”.

Customer support will

- ❖ enable feature toggle “Questionnaire Management (ID SM-6130)
- ❖ enable feature control “Supplier 360 Questionnaire” in SM admin, as this will give access to Questionnaire Tile in Supplier 360.

# Modular Questionnaire

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- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Buyer user flow
- ❖ Supplier user flow
- ❖ Buyer user (approver)

# Modular questionnaire: Step 1 – Upload Questionnaire Type

- Questionnaire type file needs to be uploaded in Administration – Data Import/export. The file contains unique name, Name and description. Unique name and Name are mandatory. Examples of Questionnaire types can be Compliance, General, Finance, Quality, ISO, Audit assessments, etc.

The screenshot shows the SAP S/4HANA Data Import/Export interface. The left sidebar includes Site Manager (Data Import/Export, Scheduled Tasks, Front Door Migration, Audit Log, User Sessions), Integration Manager, Master Data Manager, Supplier and Customer Manager, and User Manager (Users, Groups, Organizations). The main area is titled "Data Import/Export" and contains a "Search Filters" section with a "Task Name" input field and "Search" and "List All" buttons. Below this is an "Import" tab with sub-options: Import, Export, and Web Service Status. The "Import" section displays a table of tasks:

Tasks ↑	Integration Toolkit Names	Status	Last Imported	
Import Questionnaire Types ⓘ		Completed	04/09/2018 09:02:59 AM	<button>Import</button>
Import Translations for Questionnaire Types ⓘ		Completed	01/08/2018 02:30:40 PM	<button>Import</button>

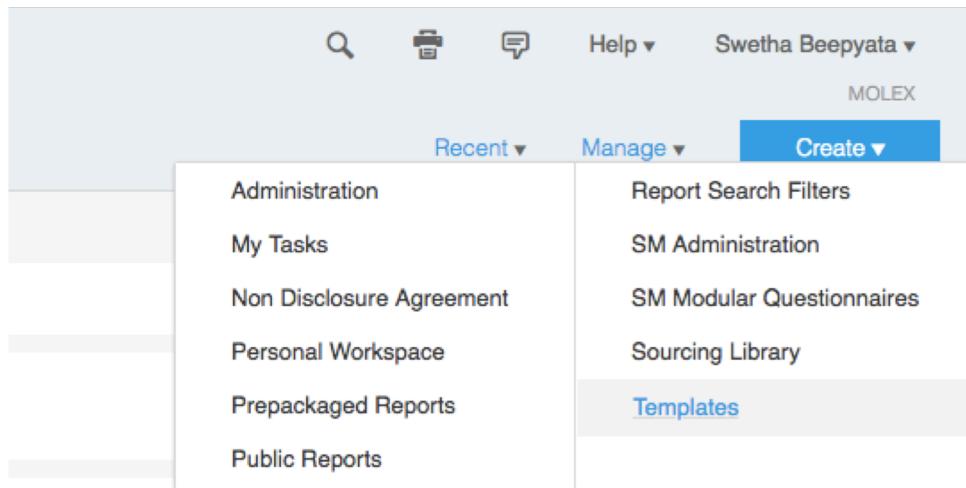
# Modular questionnaire: Step 1 – Upload Questionnaire Type

- ❖ Below is a sample questionnaire type

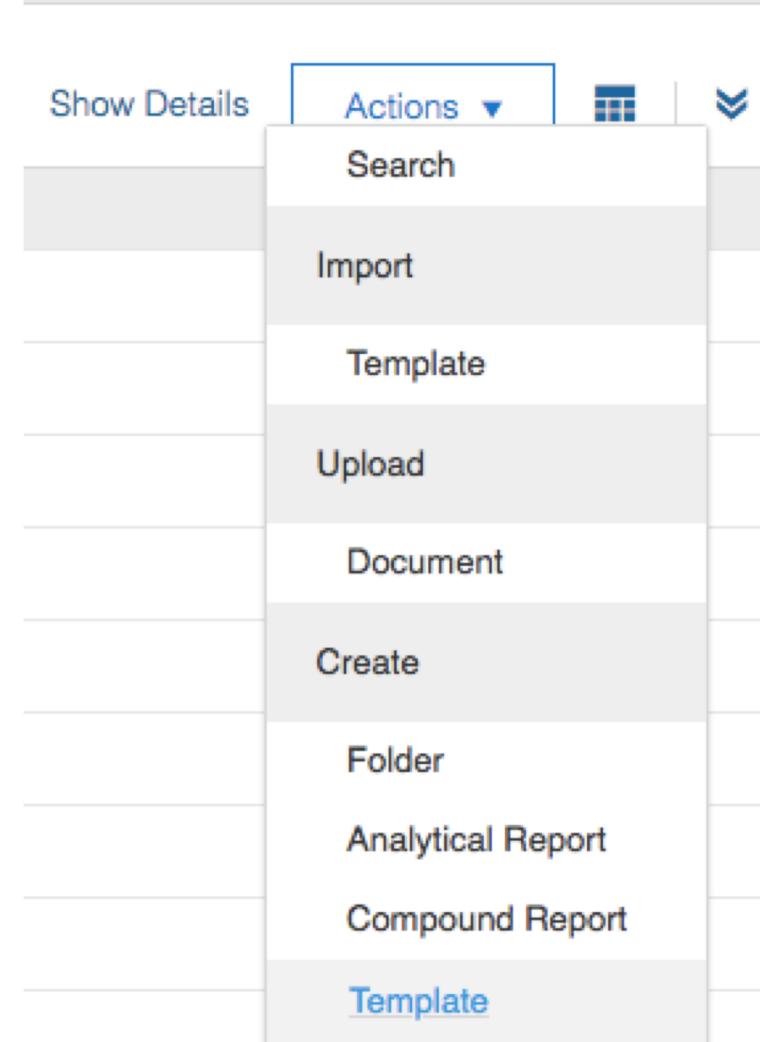
	A	B	C	D
1	UTF-8			
2	Description	Name	UniqueName	
3	Questionnaire	Code of Conduct	COC	
4	Questionnaire	Corporate Responsibility	CR	
5	Compliance	Compliance	Compliance	
6	Questions re	Environmental Health and Safety	EH	
7	questions for	Finance stability	Finance stability	
8	Common que	General	General	
9	Kosher relat	Kosher	Kosher	
10	Certificate fo	MSC Certificate	MSC	
11	For Health a	Occupational Health and Safety Rec	OHSR	
12	Quality relat	Quality	Quality	
13	Risk related	Risk	Risk	
14	Supplier Self	Supplier Self Assessment	SA	
15	Related to S	Supplier Manual	SM	
16	Set Up for tr	Transaction Details	TRA	
17	Process for c	Certificate_es	cert	
18	Process for s	Subcontractor_es	sub	

# Modular questionnaire: Step 2- Create Modular questionnaire template

- Under Manage, click on Templates



- From the templates area, click on Actions



# Modular questionnaire: Step 2- Create Modular questionnaire template contd..

1. Choose SM Modular questionnaire
2. Name the Modular questionnaire template

## Select Project Type for Template

OK

Cancel

A Template is used to create a specific type of project. To create a new Template, choose the type of project you want to eventually create from the Template.

### What type of Project will be created from this template?

Knowledge Project

SM Modular Questionnaire

Sourcing Project

Sourcing Request

OK

Cancel

# Modular questionnaire: Step 2- Create Modular questionnaire template contd..

Once the template is selected, you will be asked to name the Modular questionnaire template

Title: \*  Translations ⓘ

Description:



**Translations**

# Modular questionnaire: Step 2- Create Modular questionnaire template contd...

Modular questionnaire template created for Finance stability

The screenshot shows the SAP Modular Questionnaire interface for the 'Finance Stability' template. The top navigation bar includes tabs for Overview, Documents, Tasks, Team, Conditions, Advanced Options, and History. The 'Overview' tab is selected. On the right, there's a status bar with 'Status: Draft', 'Version: Original', and a blue 'Exit' button. Below the tabs, the template properties are listed: Name (Finance Stability), Description, ID (WS8661713), Owner (Swetha Beepytata), Base Language (English), Rank (0), Questionnaire Type (no value), Commodity (no value), Regions (no value), and Departments (no value). To the right of these properties is a list of 'Suggested steps for template editing':

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.

# Modular questionnaire: Step 3- assign Questionnaire type, Categories, Regions, and Business units

In template actions, click on edit properties to select Questionnaire Type, applicable Categories, Regions, and Business Units.

Note if a questionnaire is applicable to any of the categories, or regions or BU, please select ALL. For example, General questionnaire is valid for all categories, all regions and all Business units. The configuration should be ALL to categories, regions and Business units

Finance Stability  
SM Modular Questionnaire

Overview Documents Tasks Team Conditions Advanced Options H

Properties

Name:	Finance Stability <small>(i)</small>
Description:	<small>(i)</small>
ID:	WS8661713 <small>(i)</small>
Owner:	Swetha Beepyata <small>(i)</small>
Base Language:	English
Rank:	0
Questionnaire Type:	(no value)
Commodity:	(no value)
Regions:	(no value)
Departments:	(no value)

Actions ▾ Suggested

- Template
- View Details
- View History
- Edit Properties**
- Publish
- Revert
- Export Template
- Display
- Compact View

# Modular questionnaire: Step 3- assign Questionnaire type, Categories, Regions, and Business units contd..

Choose questionnaire Type, applicable categories, regions and business units.

Note if a questionnaire is applicable to any of the categories, or regions or BU, please select ALL. For example, General questionnaire is valid for all categories, all regions and all Business units. The configuration should be ALL to categories, regions and Business units

The screenshot shows the SAP Fiori interface for configuring a modular questionnaire. On the left, there is a detailed configuration form with various fields:

- Name: Finance Stability
- Description: (empty text area with rich text editor)
- ID: WS8661713
- Owner: Swetha Beepytata
- Base Language: English
- Rank: 0
- Questionnaire Type: \* (no value)
- Commodity: Search more
- Regions: (no value)
- Departments: (no value)
- Allowed Commodity Levels: From: \_\_\_\_\_ To: \_\_\_\_\_
- Access Control: (no value)
- Conditions: (none)

On the right, the configuration is summarized in a list:

- Questionnaire Type: \* Finance stability
- Commodity: All Commodities All Add more
- Regions: All All Add more
- Departments: 0 All Add more

# Modular questionnaire: Step 3 – Add a questionnaire within Modular questionnaire template

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In the Documents tab within the Modular questionnaire template, Click on Actions – choose “survey”. Please note we don't support any other document in Modular questionnaire.

Name the questionnaire: Please note this will be the name that will be shown to suppliers. You can use the same modular questionnaire template name

You will be navigated to the rules section – see next slide for SM rules behavior

# Modular questionnaire: Step 4 – Configure SM rules

- ❖ Select questionnaire type – Form or Questionnaire: if you want to view questionnaires with section numbers and question numbers, choose questionnaire.
- ❖ Is questionnaire required: Yes means questionnaire is mandatory. No means its optional
- ❖ Reuse: Yes or No. For example, if a questionnaire is already answered as part of a Registration or Qualification process (with Enhanced qualification/Registration) for any of the applicable categories, regions, and business units, questionnaire can be reused for incremental qualification. NOTE: this is supported only with the new Enhanced registration/qualification process which is in the roadmap
- ❖ Type: External – **We support only supplier facing questionnaire**
- ❖ Questionnaire Expiry: Yes or No. If yes, you can configure the expiry schedule and when the notification should be sent to supplier to update the response.
  - For example if a questionnaire is approved on Jan 31 2018, and expiry schedule is 1 year from Jan 31, 2018, the expiry date will be on Jan 31 2019.
  - Notification will be triggered to the supplier 6 months before Jan 31 2019.
- ❖ Open or Closed: Open means if a questionnaire is approved, the recipient of the questionnaire can always update it. Best practice: If you want supplier to update the information always, please mark the questionnaire as Open
- ❖ The questions in the questionnaire can be configured like any other questionnaire

## Supplier Management

Specify questionnaire format:	<input type="button" value="No Choice"/> <input type="button" value="i"/>
Is questionnaire required?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="i"/>
Specify questionnaire type:	<input type="button" value="No Choice"/> *
Reuse:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="i"/>
Show in supplier profile:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="i"/>
Always open:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="i"/>
Can expire?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="i"/>
Can expire?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="button" value="i"/>
Expiration schedule:	Expires every <input type="text" value="0"/> year(s) <input type="button" value="i"/>
Send reminder:	<input type="text" value="0"/> year(s) <input type="button" value="i"/> before expiration
<input type="checkbox"/> Notify primary supplier manager	
<input type="checkbox"/> Notify project owners	

# Modular questionnaire: Step 5 – Add content inside the Modular questionnaire

- ❖ Configure questionnaire with various answer types (Please note this is a standard way of adding questions in a questionnaire)

## All Content

Name ↑
1 How long has your company been in business?▼
2 How frequently do you update or enhance your software?▼
3 Please provide with a copy of your commercial insurance levels▼
4 Do you have recent audit reports on privacy & security?▼
5 If yes, please provide a copy of the audit report?▼

# Modular questionnaire: Step 5 – Configure approval tasks

- ❖ We support two kinds of approval process
  - New Phase – If a recipient (of the questionnaire) submits the questionnaire for the first time, the approval goes through the New phase
  - Update phase – Once the questionnaire is approved, and if a recipient updates the response either because the questionnaire is open or questionnaire is expiring/expired, or some one has requested for update, the questionnaire goes through the Update phase process

Note: In the tasks we support only To do task and Approval task. The other tasks such as Review, Notification are not supported in SLP.

Create Phase

Enter a **Title** and a **Description** for this new phase. **Subscribe For** controls the association between this phase and shared knowledge. You can **select** multiple knowledge area keywords to subscribe to, or subscribe to **All** if you [More](#)

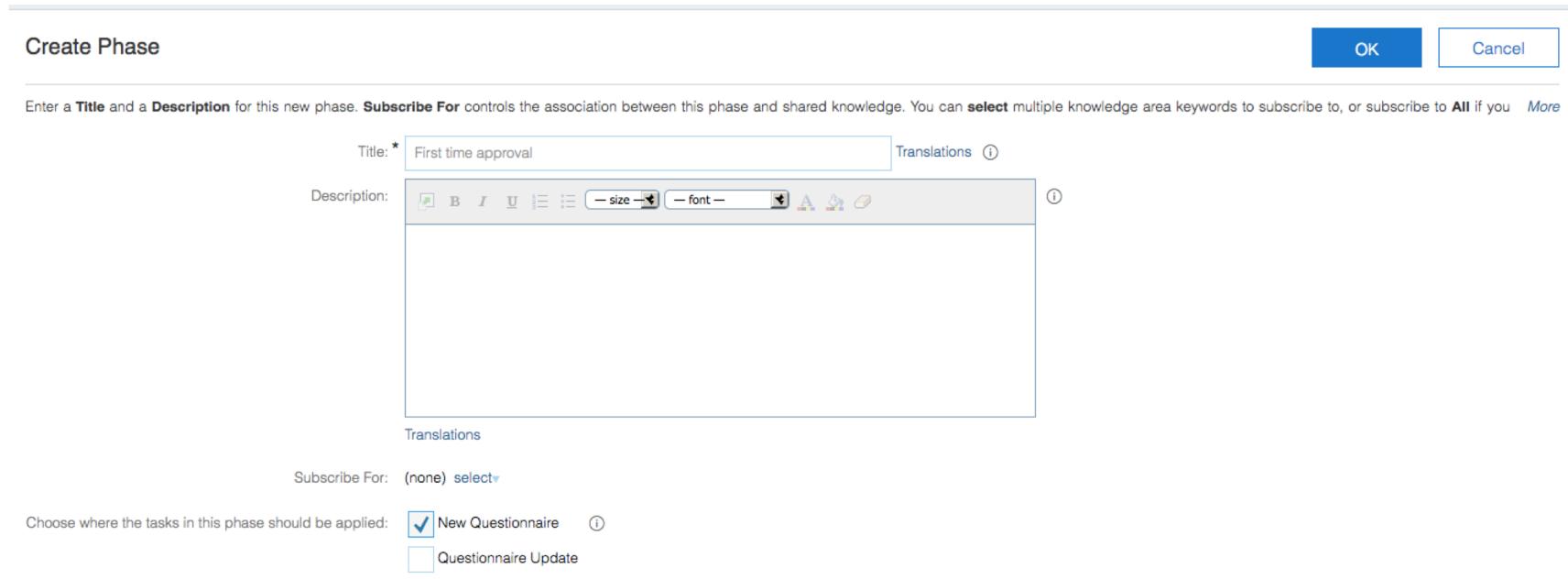
**Title:** \* First time approval Translations ⓘ

**Description:** Translations ⓘ

**Subscribe For:** (none) [select](#)

Choose where the tasks in this phase should be applied:  
 New Questionnaire ⓘ  
 Questionnaire Update

**OK** **Cancel**



# Modular questionnaire status behavior

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- ❖ Not started – when a questionnaire is sent to the recipient but recipient has not started answering the questionnaire
- ❖ Pending submission – when the recipient has started answering the questionnaire but not yet submitted
- ❖ Pending approval – when the recipient has submitted the questionnaire but now the questionnaire is in approval
- ❖ Pending resubmit – when the approver has requested additional info from the recipient and is waiting for recipient to update and submit the questionnaire
- ❖ Approved – when the questionnaire is approved
- ❖ Denied – when the questionnaire is denied
- ❖ Expiring – when the expiring notification triggered on the questionnaire (based on the configuration in modular questionnaire template)
- ❖ Expired – when the expiry date is current or past, the status of the questionnaire is expired

# Modular questionnaire

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- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Buyer user flow – Sending questionnaire to supplier
- ❖ Supplier user flow
- ❖ Buyer user (approver)

# Sending questionnaires to supplier: Step 1 – Select Modular questionnaire or questionnaires

- ❖ Buyer user needs to have permission “SM Modular questionnaire manager” to send Modular questionnaire(s) to one or more suppliers
- ❖ In Manage, click on SM Modular Questionnaire. It is visible only to users with SM Modular questionnaire manager

The screenshot shows the SAP Ariba Home page. At the top right, there is a search bar, a print icon, a help icon, and a user dropdown for "Swetha Beepyata". Below the header, there is a navigation bar with links for HOME, SUPPLIER MANAGEMENT, SUPPLIER RISK, and MORE... The main content area includes a "Sourcing Project" dropdown, a search bar, and three cards: "Event Status" (17 Open, 14 Completed), "My ECRs" (0 Submitted ECRs), and "Completed Tasks" (0 Completed Tasks). On the left, there is a "Common Actions" sidebar with options like Create, Quick Survey, Supplier Request, Qualification Request, Customer, and More. At the top center, there are "AW Options..." and "FULL PAGE REFRESH!" buttons. A dropdown menu is open under the "Manage" button, listing options such as Administration, My Tasks, Non Disclosure Agreement, Personal Workspace, Prepackaged Reports, Public Reports, Report Search Filters, SM Administration, Sourcing Library, and Templates. The "SM Modular Questionnaires" option is highlighted in blue.

# Sending questionnaire to supplier: Step 1 – Select Modular questionnaire or questionnaires contd..

Persona: Buyer user with SM questionnaire manager permission. S

- ❖ You can see the list of all Modular questionnaires configured
- ❖ You can search by Modular questionnaire name

NOTE: Only Modular questionnaire templates that are active will show up.

The screenshot shows a table titled 'Questionnaire' with a search bar at the top. The columns are: Questionnaire Name, Category, Region, Business Unit, and Type. There are 11 rows of data, each with a checkbox next to the questionnaire name. The data includes:

Questionnaire Name	Category	Region	Business Unit	Type
Supplier code of Conduct for Clothing in USA	Clothing	USA	Corporate	COC
Supplier Manual for Packaging services	Packaging services	All	All	SM
New Certificate test - Halal	All Commodities	All	All,Corporate	cert
SB corporate responsibility - Feb8	Information Technology Broadcasting and Telecommunications	All	All	CR
Subcontractor questionnaire	All Commodities	USA	All	sub
New Test Template - 2	Drugs and Pharmaceutical Products	USA	All	COC
Compliance questionnaire	All Commodities	Europe	All	CR
Furniture USA and Manufacturing	Furniture and Furnishings	USA	Manufacturing	CR
testing questionnaire	Chlorine Cl	China	Services	SM

The screenshot shows a table titled 'Questionnaire' with a search bar at the top containing 'fin'. The columns are: Questionnaire Name, Category, Region, Business Unit, and Type. There is one row of data, which is highlighted in blue. The data is:

Questionnaire Name	Category	Region	Business Unit	Type
Finance stability	All Commodities	All	All	Finance stability

# Sending questionnaire to supplier: Step 2 – Select one or more suppliers

- ❖ Select suppliers you want to send. You can select more than one suppliers.
- ❖ You can apply filters or search by name. You can also filter by saved search (if you have any saved search criteria defined in Supplier search page)

Supplier search results page showing 1 - 10 of 57 Results. The results are:

Supplier Name	Location	Vendor ID
VIJAY SALES	Mumbai, IN	VDR19075
Bell services	Palo Alto, CA, USA	401345
AP2Vanan_0208		VDRVanantest
Delimiter19		VDR13100
DLF CYBER CITY DEVELOPERS LIMITED.	GURGAON, IN	VDR19056

Supplier search results page showing 1 - 1 of 1 Results. The result is:

Kelly technologies	Palo Alto, CA, USA	Vendor ID
<input checked="" type="checkbox"/>	Kelly technologies	22222

# Sending questionnaire to supplier : Step 3 – Confirm or add supplier contact (if missing)

- ❖ Only those suppliers who have at least 1 supplier contact will be shown
- ❖ If you want to choose a different supplier user, you can click on Change contact. Only one user can be selected
- ❖ NOTE: we support **supplier facing questionnaire** ONLY. Sending Modular questionnaire to internal users is planned in the roadmap. Please refer to updated roadmap.

The screenshot shows a summary screen for sending questionnaires. At the top right is a blue 'Send to Suppliers' button. Below it, the message 'You selected 1 Suppliers and 1 Questionnaires' is displayed. Two boxes are present: one for 'Supplier good to go' (1) with a checkmark and a note to verify contacts before sending; and another for 'Supplier missing contact' (0) with a question mark icon and a note stating these suppliers will be removed unless contact info is added. At the bottom, there's a section for 'Kelly technologies' (Palo Alto, CA, USA) showing a primary contact named 'Swetha Beepyat' with a 'Change contact' button.

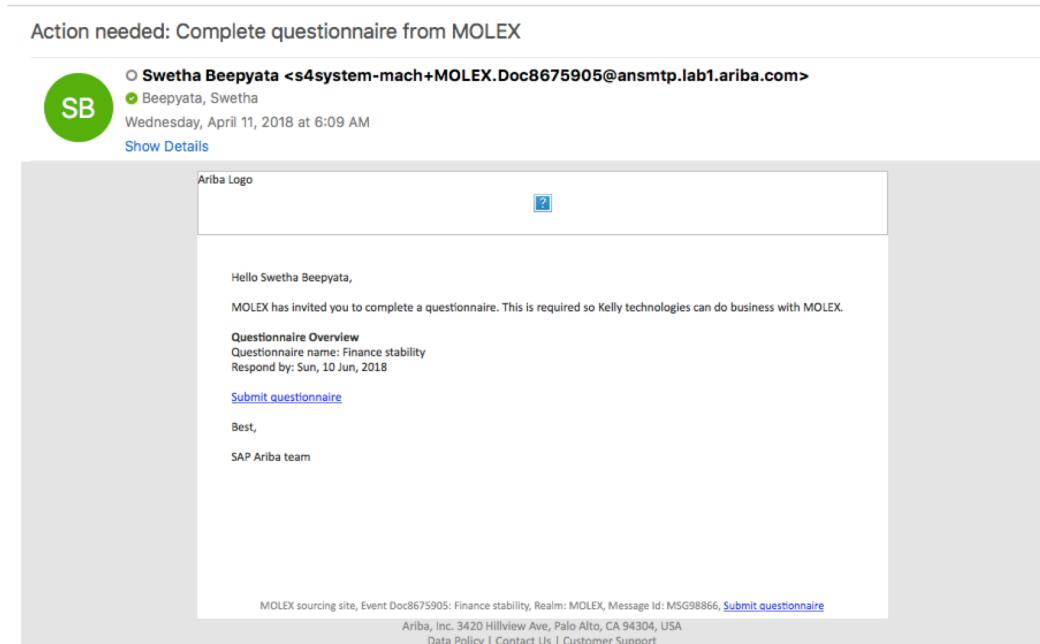
# Modular questionnaire

---

- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Buyer user flow – Sending questionnaire to supplier
- ❖ Supplier user flow
- ❖ Buyer user (approver)

# Supplier: Step 1 – Receives email to submit questionnaire

- ❖ Supplier receives email to complete questionnaire
- ❖ Supplier has to log in to AN, and click on Questionnaire from Questionnaires section to answer



## Questionnaires

Title	ID	End Time ↓	Commodity	Regions	Status
► Status: Completed (1)					
▼ Status: Open (1)					
Finance stability	Doc8675905	6/10/2018 6:09 AM	All Commodities All	All All	Not Responded

# Supplier: Step 2 – answers questionnaire

- ❖ Supplier answers the Modular questionnaire

Doc8675905 - Finance stability

Time remaining  
59 days 23:38:40

All Content

Name ↑	
1 How long has your company been in business?	
2 How frequently do you update or enhance your software?	
3 Please provide with a copy of your commercial insurance levels	Attach a file
4 Do you have recent audit reports on privacy & security?	Unspecified ▾

(\*) indicates a required field

Submit Entire Response | Save | Compose Message | Excel Import

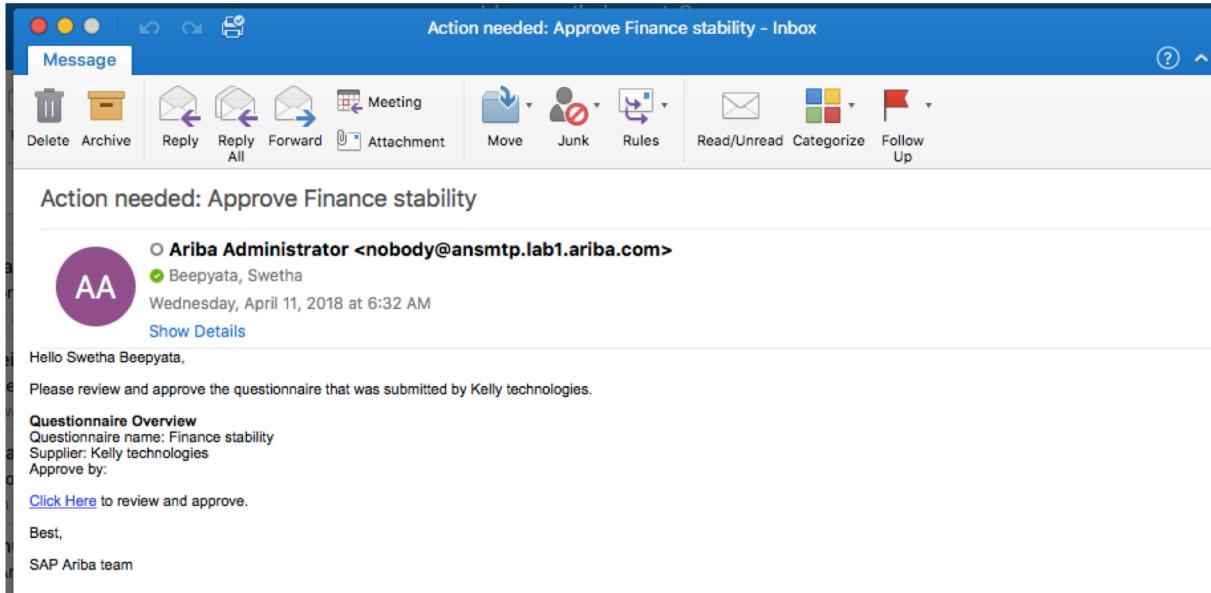
# Modular Questionnaire

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- ❖ Capabilities
- ❖ How to enable feature
- ❖ Configuration
- ❖ Buyer user flow – Sending questionnaire to supplier
- ❖ Supplier user flow
- ❖ Buyer user (approver)

# Buyer user (Approver): Step 1 – receives email to approve questionnaire

- ❖ Approver receives email to approve the response submitted by supplier
- ❖ Approver can access all Modular questionnaire tasks related to a supplier from Supplier 360.



# Buyer user (Approver): Step 2 – Approves the task

- ❖ Approver receives email to approve the response submitted by supplier
- ❖ Approver can access all Modular questionnaire tasks related to supplier from Supplier 360 in Questionnaire tile
- ❖ Approver can approve, reject or request additional information from the recipient

Approve Finance stability

Supplier: Kelly technologies Category: All Commodities Started: April 11, 2018

Contact: Swetha Beepyata swetha.beepyata@sap.com Region: All

Owner: Swetha Beepyata

[Request Additional Info](#) [Deny](#) [Approve](#)

Process Flow:

```
graph LR; A(( )) --> B[Questionnaire started]; B --> C[Swetha Beepyata]; C --> D(( )); C --> E(( )); C --> F(( )); D -.-> G(( )); G --> H(( ));
```

Questionnaire approved

Supplier questionnaire

Questionnaire	Response
1 How long has your company been in business?	30 years
2 How frequently do you update or enhance your software?	5 years
3 Please provide with a copy of your commercial insurance levels	
4 Do you have recent audit reports on privacy & security?	true

# Supplier 360- List of all modular questionnaires in one place

- ❖ Buyer user can see the list of all Modular questionnaires for a given supplier in supplier 360

The screenshot shows a dashboard for a supplier in Supplier 360. At the top, there are four tabs: Overview, Registration, Questionnaires, and Risk. The Questionnaires tab is selected, displaying a count of 4. Below this, there are two sections: 'Questionnaires (4)' and 'Tasks (4)'. The 'Questionnaires (4)' section lists four entries with columns for Name, Sent on, Owner, and Status, each with a 'View' button. The 'Tasks (4)' section lists three pending tasks with columns for Name, Action by, Start date, and Due date.

Questionnaire Name	Sent on	Owner	Status	Action
Finance stability	Apr 9, 2018	Project Owner	Not Responded	<button>View</button>
Finance stability	Apr 10, 2018	Swetha Beepyata	Pending Approval	<button>View</button>
Manual for apparel products	Apr 10, 2018	Project Owner	Not Responded	<button>View</button>
ISO certificates questionnaire	Apr 10, 2018	Swetha Beepyata	Pending Approval	<button>View</button>

Name	Action by	Start date	Due date	
Approve Finance stability				

Name	Action by	Start date	Due date	
Approve Finance stability	rashmi	Apr 11, 2018		

Name	Action by	Start date	Due date	
Approval for Manual for apparel products				

Name	Action by	Start date	Due date	
Approve ISO certificates	Quality	Apr 11, 2018		<button>Approve / Deny</button>