## **SAP Supplier Relationship Management 7.0** Delta Presentation – Supplier Evaluation



Name of Speaker, Department Date

For the latest version of this document, please refer to the SAP Service Marketplace extranet at <u>www.service.sap.com/srm</u>, under SAP SRM 7.0.



### Introduction



This presentation gives an overview of the new and enhanced features of the SAP Supplier Relationship Management (SAP SRM) 7.0 application in the area of Supplier Evaluation, compared with the previous release.

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## AGENDA

- 1. Supplier Qualification and Performance Management:
  - The Supplier Survey Cockpit
    - Introduction
    - Overview
    - Detail
    - Analysis in SAP NetWeaver BI





Purchasing Governance	Global Spend Analys	is	Category M	lanagement	Compliance Management		
Sourcing	Central Sourcing Hu	b	RFx / Au	uctioning	Bid Evaluation & Awarding		
Contract Lifecycle Management	Contract Authoring	Contr	act Negotiation	Contract Exec	cution Contract Monitoring		SAP Ne
Collaborative Procurement	Self-Service Procurement	Servic	es Procurement	Direct / Plan-D Procureme	Driven Catalog Content ent Management		
Supplier Collaboration	Web-based Supplier Interaction		Direct Docum	ent Exchange	Supplier Network		
Supply Base Management	Supplier Identificatio & Onboarding	n	Supplier Dev Performance	velopment & Management	Supplier Portfolio Management		



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Sourcing	Central Sourcing Hu	b	RFx / Aι	uctioning	Bid Evaluation & Awarding		
Contract Lifecycle Management	Contract Authoring	Contr	act Negotiation	Contract Exec	cution Contract Monitoring		SAP Net
Collaborative Procurement	Self-Service Procurement	Servic	es Procurement	nent Direct / Plan-Driven Catalog C Procurement Manage		Catalog Content Management	tWeaver
Supplier Collaboration	Web-based Supplier Inter	raction	Direct Docum	ent Exchange		Supplier Network	
Supply Base Management	Supplier Identificatio & Onboarding	'n	Supplier Dev Performance	velopment & Management	Supplier Portfolio Management		

## The Supplier Survey Cockpit Supports Ad Hoc Surveys for Qualitative Data Collection



## With the supplier evaluation process, you can capture, consolidate, and present performance data across the enterprise



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## **SAP SRM Offers Different Methods to Collect Information About Supplier Performance**



#### Data from a variety of sources can be combined into a single supplier score

- Questionnaires using Web survey tool
  - Event-driven surveys, triggered by registration of confirmation or invoice in the SAP Supplier Relationship Management (SAP SRM) application
  - Questionnaires in the business warehouse, linked to SAP NetWeaver BI reports
  - Ad hoc surveys using the supplier survey cockpit in SAP SRM
- Automatically calculated key figures from the SAP ERP application
  - Predefined KPIs for price, quality, and delivery, based on SAP ERP transactions

New in SAP SRM 2007 with some enhancements in SAP SRM 7.0

#### Advantages of ad hoc surveys over event-driven surveys

- Reach a broad group of people in different positions
- Offer more extensive questionnaires
- Considerably enhance SAP SRM's supplier evaluation functionality

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## **The Supplier Survey Cockpit**



# New Functionality – The Supplier Survey Cockpit Image: Cockpit Prepare survey Distribute survey Monitor responses Close survey Survey

#### **Enhancements in SAP SRM 7.0**

- A Web-based cockpit for distribution and monitoring of ad hoc surveys, using questionnaires
- Integration with Web survey tool from SAP for questionnaire creation
- Integration with SAP NetWeaver BI for consolidation and reporting

#### **Business Benefits**

- Provides a one-stop shop for enterprisewide distribution of survey
- Creates a central point for controlling all surveys within the company
- Due to ease of use, makes surveys an important tool for company-wide supplier evaluations



- Create survey and get a unique survey ID
- Enter parameters for evaluation, such as evaluation period and category
- Assign questionnaire from the Web survey tool
- Create an "info bank" using the "who rates whom" master sheet to identify which people are most qualified to evaluate specific suppliers
- Upload suppliers and evaluators from Microsoft Excel

#### **Business Benefits**

- Collect strategic, ad hoc surveys across the company
- Distribute surveys to the right people for comprehensive supplier evaluation
- Create surveys quickly



- Create an invitation letter to the participants of survey
- Distribute the questionnaire via e-mail

#### **Business Benefits**

Quick and easy distribution



- Monitor the status of individual responses
- See an overview of status and response rate, which is available at any time
- Review the response
- Send reminder

#### **Business Benefits**

- Easy monitoring of the survey using detailed and at-a-glance overviews of the status
- Higher response rate







- When the survey deadline has passed or the response rate is satisfactory, the survey owner sets the status to "completed"
- All data is ready for upload to SAP NetWeaver BI for analysis

#### **Business Benefits**

- Ability to search through surveys with different statuses, via status management
- Ability to identify those parameters most important to your organization, through weighting
- Survey consolidation in SAP NetWeaver BI
- Analysis performed in SAP NetWeaver BI

## **New Terminology**



must be assigned to a survey package.

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## **Personalized Object Worklist (POWL) for the Supplier Survey Cockpit**

Welcome Mr. Viola Purchaser2	SRM Syst	em : E7S						RM System	Help   Personalize   Log Off S
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Detailed Navigation	Active	Jueries							
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	B D	Name	Status	Evaluation Cat	egory Evaluation A	rea Survey Manager	Evaluation Start Date	Evaluation End D	ate Survey Deadline 🔺
Who rates whom list	37								
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<u> </u>	3	KKR 1'st surv	Active	Consulting	Quality	Erwin Admin1	22.02.2008	29.02.2008	31.03.2008
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								Last Refresh 2	27.03.2008 09:22:38 CET <u>Refresh</u> 🗐

Web survey tool is accessed directly from navigation area of the supplier evaluation

## **Create Questionnaires Using the Web Survey Tool from SAP**



#### New application (transaction) and parameters especially for the supplier survey cockpit

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● Very good	Excellent	Survey >/survey/SURVEY_ID< >/survey/SURVEY_NAME<	for the supplior
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No response            • Outwork            • Outwork </th <th>Red</th> <th>How do you rate the customers overall convises?</th> <th>1</th>	Red	How do you rate the customers overall convises?	1
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### **Create a Survey**

#### **Process steps:**

- 1. Fill out general information, assign the questionnaire, and write an e-mail
- 2. Select participants manually or using the who rates whom sheet
- 3. Send the survey to the participants

Cre	Create Survey Help														
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## Enter Participants Manually or by Using the Who Rates Whom Sheet



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- List of participants and their expertise regarding suppliers and area, such as quality, delivery, service
- Accessibility of the list from the survey screen
- Import/export to Microsoft Excel for offline maintenance of the who rates whom sheet

### **Write Invitation and Reminder Letter**



## **Surveys and Survey Packages**

Companies evaluate suppliers on different aspects, such as timeliness, quality, service, and price. Surveys are therefore distributed to different people in the organization, depending on their area of expertise.

In the supplier survey cockpit, one survey is linked to one questionnaire. The company needs to create one survey for qualityrelated questions, another for delivery-related questions, and a third for services-related questions, for example. To track and analyze the results jointly for all three surveys, you can use the concept of the **survey package**, which affords you a 360-degree view of the supplier.



## **Survey Package**

- A survey package can be created either from the survey package POWL or directly from the survey
- The user can view all surveys assigned to a survey package
- The user can re-assign surveys to another survey package unless the status is "completed"

Display Surv	Display Survey Package													
Survey Package ID: 160 Change Close Windo	urvey Package ID: 160 Survey Package name: Spare Parts 2007 Change Close Window													
▼ Survey Package Gener	r Survey Package General data													
Survey Package ID: *	Survey Package ID: * 160 Name: * Spare Parts 2007 Description: Survey of all suppliers providing spare parts 2007													
▼ Surveys in current Sur	vey Package									Ē				
Create Details	Change Delete Se	ettings												
Survey ID 🗧	🗧 Survey Name 🛛 🖨	Survey Status 🛛 🕀	Questionnaire ID 👙	Questionnaire $\updownarrow$	Eval. Category 🛛 🕀	Eval. Area 🛛 🕀	Survey Owner  👙	Period Start 🛛 🕀	Period End 🛛 🕀	Survey Deadline 👙				
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#### The survey POWL gives an overview of multiple surveys in one glance. The list can be sorted by survey owner, status, or any other column.

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<u>62</u>	Ole's second development Survey	1	Active	Marketing	Quality	Jan-Ole Lingsch	23.01.2008 - 27.01.2008	06.01.2008	0	2	0	0,00	

## **Detailed Screen for Monitoring of Individual Responses**

#### From the detailed screen:

- Get a statistics summary
- Monitor the individual responses and send a reminder
- View the answers and assign a status of "reviewed"

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urvey ID: 153 Read Only Save	Surv Complete	ey Package: Check Close	122 e Window	Status: Active Ev	aluation Period: 01.0	01.2007 - 31.12.20	07						
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### **Review Each Answered Questionnaire**

Change Su	urvey						Help
Survey ID: 153 Read Only Save	Surv Complete	ey Package: Check Clos	122 e Window	Status: Active Evaluation Period: 01.01.2007 -	31.12.2007		
<ul> <li>General Information</li> </ul>							
Survey ID: * Name: Status: Survey Package: * Evaluation Area: Questionnaire: Letters:	153 SBM1 Active 122 QUAL A31012008 Invitation	Reminder	Gualit A310	New Questionnaire - Microsoft Internet Explorer pro File Edit View Favorites Tools Help Back - O - X O - Search Address https://uscie6u.wdf.sap.corp:44390/sap/bc/webd Delivery	vided by SAP IT Favorites 🚱 🔗 - 🌺 🗵 - 📘 Iynpro/sapsrm/wda_l_fp_oif/;sap-ext-sid=MWxkho	_ □ ×	
✓ Survey Statistics Number of Days Unti Number of Sent Que	il Survey Dea stionnaires:	dline:	0	How satisfied are you with the suppliers performance Very satisfied Satisfied Unsatisfied No response How eatisfied are you with the quality of delivered of	ce regarding delivering on promised time?		
<ul> <li>✓ Organise Supplier(s</li> <li>Select All</li> <li>De</li> <li>E Participant ID</li> </ul>	) to Participar stails Chang First Name	nt(s)/Participan ge Add ∡ F Last Name	it(s) to Supplier Remove S Supplier ID	<ul> <li>Very satisfied</li> <li>Satisfied</li> <li>Unsatisfied</li> </ul>			Filter Settings Preferred Language
D043104 D043104 MVS TEST FDGFDGF	Birgitta Birgitta Mani Purchaser Yjgj	Magnusson Magnusson VS 1 ggg	1000 1001 1001 1000 1000	No response	used to be a very good and reliable supp lately	lier. Has however slipped in perfc	EN EN EN
D040382 1002 DFGTE5 SDAE23 12345	Jan-Ole Siggi ertryll sedfg 1234	Lingsch Müller ety sfh 1234	1000 1000 123 1000 1001	I ■		Local intranet	DE EN RU EN

SAL





The user manually assigns the status "completed." Answers and parameters are transferred to SAP NetWeaver BI for analysis.



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### **Customization**

#### Before deploying the supplier survey cockpit, you need to customize:

- Evaluation area
- Evaluation category
- System-generated ID for survey
- ID for survey package

... and, of course, the questionnaire - using the Web survey tool



## AGENDA

1. Supplier Qualification and Performance Management:

The Supplier Survey Cockpit

Introduction

Overview

Detail

Analysis in SAP NetWeaver BI



## **Process Flow for the Surveys Using the Supplier Survey Cockpit**





- Step 1: Extract master data from questionnaire
- Step 2: Customize grouping and weighting of questions
- Step 3: Load the grouping text and the weighting
- Step 4: Load actual data (parameters) to SAP NetWeaver BI (supplier, participant, evaluation area, etc.)
- Step 5: Load the answers

#### Parameters Transferred from the Supplier Survey Cockpit to SAP NetWeaver BI for Analysis



#### Description

- Survey ID
- Survey name
- Survey package ID
- Survey package name
- Questionnaire name
- Questionnaire ID
- Supplier
- DUNS number
- Evaluation area ID

- Evaluation area description
- Evaluation category ID
- Evaluation category description
- Evaluation period
- Participant e-mail address
- Participant last name
- Participant first name
- Plant ID (of participant)
- Plant text (of participant)

## **Reports for the Supplier Survey Cockpit in SAP NetWeaver BI**



Varia	ble Entry		
	Available Variants:	Save Save As.	Delete
	Variable	Current Selection	Description
	Survey ID		
	Supplier		
	Survey Package		
	OK Check		

#### **Reports from info cube 0SR\_VE\_C2**

- OSR\_VE\_Q001 detailed view of a survey and survey package (example)
- OSR\_VE\_Q002 trend analysis for evaluation areas

Supplier Survey Cockpit : V	ata Update: 07.09.2007	18:56:23					
New Analysis Open Save	ersion Exp	ort to Excel	Comments Filter S	<u>ettings</u>			
<ul> <li>Columns</li> <li>Supplier</li> <li>Key Figures</li> </ul>	Supplier Grouping 3	1000 C.E.B. BERLIN	Average Score	Counter 1	Counter 2		ļ
<ul> <li>Rows</li> </ul>	Crouping 5	Number of Responses	before Weighting	Counter 1	Counter 2	Average score	
<ul> <li>Grouping 3</li> </ul>	▼SurveyWorkL1					Antor Proighting	
<ul> <li>Grouping 2</li> </ul>	DocumentsSurveyL2						-
<ul> <li>Grouping 1</li> </ul>	Preference			4	2		
Criterion	Shipping DocumentsL3			2	1		
<ul> <li>Free characteristics</li> </ul>	SurveyPerformanceL2						
<ul> <li>Participant First Na</li> </ul>	▶ PM/Not assigned			0	2		
<ul> <li>Participant Last Name</li> <li>Plant</li> </ul>			K K Colu	imn 1 o	f 4 🕨 🌬		
<ul> <li>Survey Name</li> </ul>							
<ul> <li>Survey Package Name</li> </ul>							



## **Thank you!**

