Flexible Survey Key User Guide

Version History

Version	Release Date	Description of Version/Page
1.0	*24.04.20*	Initial document - draft
1.1	*05.05.20*	Initial document – Final Version
1.2	*26.06.20*	**Survey duration-field in Survey-Creator adapted:** Default is always a few minutes & drop-down selection is reduced **(p. 44)** **Survey Creator: Start- and End-Date:** Implementation Date Picker **(p. 44)** **Create Group name as Helper Text for BD Fields** BD-Fields now have the group name as additional identification shown **(p.28)** **Remove "addother" from Questionnaire Creator** The option addother was removed from question type Dropdown **(p.26)** **Adapt Excel Report** "InvitedAs" is introduced **(p.51)** **Fill out: Validate Max Valid Date of BD Date Fields** A maximum date in the future is defined when the Creator adds a date field to the questionnaire **(p.28)**
1.3	*11.11.20*	**Questionnaire Language:** Default language English should be set before you start creating your questionnaire. If not: button in the Translation tab to change default language **(p.39)** **Recipient list:** One can use the supplier ID in excel upload for recipient list **(p.15)** **Questionnaire Navigation Bar**: Navigation/editing bar is on the right side (no Pop-Up window). Screenshots/ explanations are adapted **(p.24)** **Survey Evaluation:** Excel report is adapted: "SupplierID", aggregated "company status" and "latest reminder" is added **(p.52)** **Questionnaire Dependencies:** Explanation how to exactly add dependencies, especially for BD fields **(p.37-38)** **Questionnaire Field Types:** New field type "Headline" and "Question" **(p.28)**

2.0	*11.01.21*	**Version History** Insertion of version history **Questionnaire Field Types:** Explanation of difference between Heading and Question **(p. 28)**
2.1	*20.01.21*	**Updated Video Links (p.56)** **Collaboration Concept** Edit if others (of your company) can see the questionnaire/survey that you created **(p.42 + 45)** **Survey feature "Resend Invitation"** Invitation of a survey can be resent to one recipient **(p.55)** **Edit Survey that runs** Add Recipient List to running Survey **(p.48)** **Network error problem solution (p.58)**
2.2	*11.02.21*	**Extend Survey Duration (p.45)** **Resend up to 10 Survey Reminder (p.57)**
2.3	*12.05.21*	**Updated multiple figures (p11, p24, p35, p42-46)**

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1 Overview of SupplyOn Flexible Survey

What is required for SupplyOn Flexible Survey and how do you use it?

1.1 Starting with SupplyOn Flexible Survey

Starting point for using SupplyOn Services is always the web-site: www.SupplyOn.com

1.1.1 Access SupplyOn

On the SupplyOn web-site you can login with your user ID and password. These access data are available from your internal company administrator (see chapter Internal Support).

1.1.2 Roles & Rights

In order to work with SupplyOn Business Directory your internal company administrator will need to assign the right role(s) to your user. These roles define what you can do within SupplyOn Flexible Survey (see table below):

Business Directory Roles & Rights

Role Name	Rights
SurveyInitiator	Manage surveys and survey responses.

Table 1 – Flexible Survey Roles & Rights

1.2 Working with SupplyOn Flexible Survey

1.2.1 General information

If you have logged in to SupplyOn and your user has the required roles you can work with SupplyOn Flexible Survey.

Go to "SupplyOn Services" in the header menu and select "Flexible Survey".

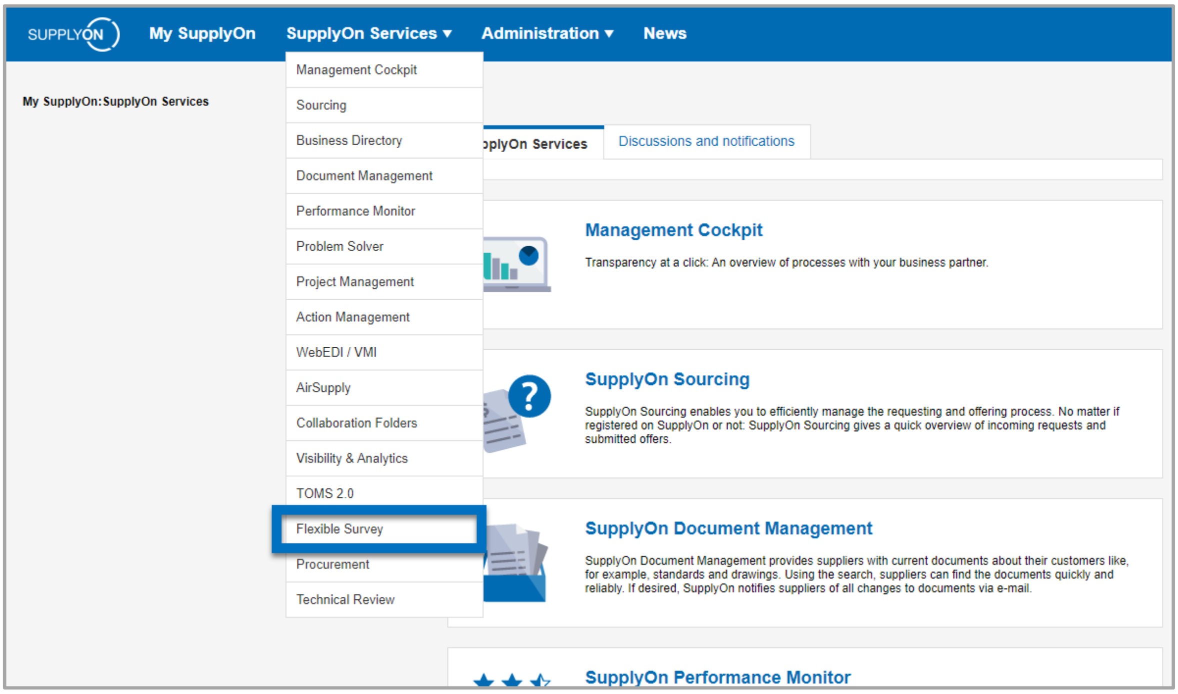


Figure 1 - How to find Flexible Survey

1.2.2 Flexible Survey Overview

A Survey consists of a questionnaire and a recipient list. The survey is "the basic framework" as it contains the basic information. The questionnaire defines the content and the recipient list indicates to whom the survey is addressed to.

After you selected "Flexible Survey", you will be redirected to the library page ❶. There you can see the list of all surveys, questionaires and recipient lists in the several tabs as well as the related details (ID, Name, Status, Remaining Time, Due Date, Duration, Buyer Company, Creation Date, Type ❸). The order of the details column can be changed by "dragging" and "dropping".

The questionnaire, recipient and survey list is always arranged in such a way that the most recent is always displayed first at the top of the list.

In addition, you can set the filters based on the individual details ❷ and sort the survey/questionaire/recipient list by clicking on the feature after you want to sort. The arrow ↑ shows the characteristic by which the list is currently sorted ❸.

Remember the filter you set for searching Recipient lists, Questionnaires, Surveys:
If you select filters in the overview libraries, theses filters will be remembered during your Survey session.

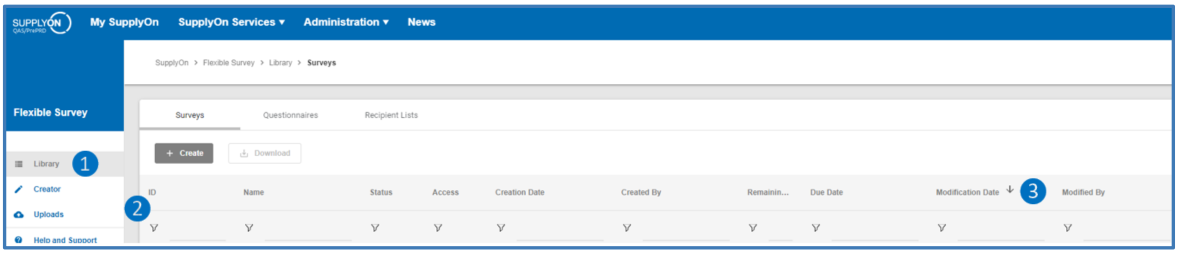


Figure 2 - Overview Flexible Survey

1.2.3 Recipient List

A recipient list is needed to perform a survey. The recipient list contains all connected and unconnected suppliers to whom the survey should be sent. The recipient list should be created ad hoc for each survey to invite suppliers with the correct account. Therefore, recipient lists cannot be shared across your company. We recommend to reuse only list with registered recipients as the registration type of other recipients can change while a survey.

We recommend to roll out Suppliers via SLM as E-Mail Suppliers and then Start the invitation process to make sure that you are not creating duplicates.

In order to create a recipient list, you can choose between two options:

- ❶ “Create” a recipient list
- ❷ “Upload” a recipient list

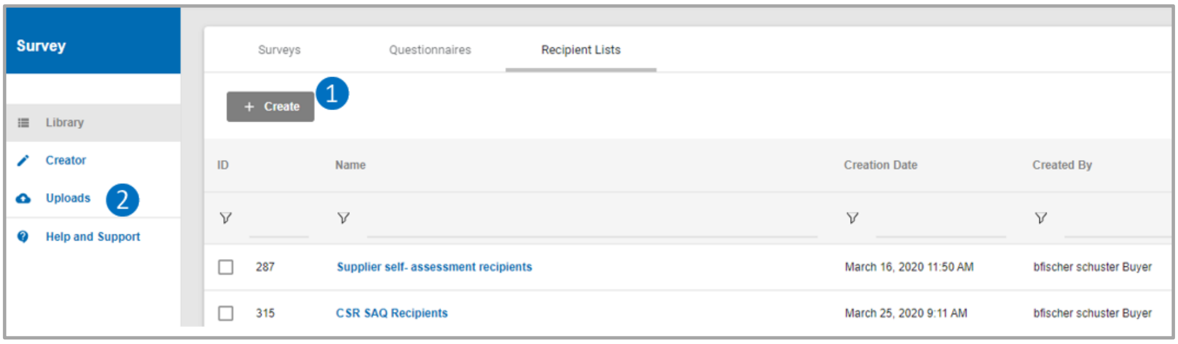
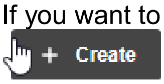


Figure 3- Options for creating recipient list

1.2.3.1 Create a recipient list

If you want to create a recipient list manually choose the tab “Recipient Lists” and click on the 

button. Enter a name (editable laterwards) ❶ for the recipient list and click on “Create” ❷. This button will be enabled after inserting the title

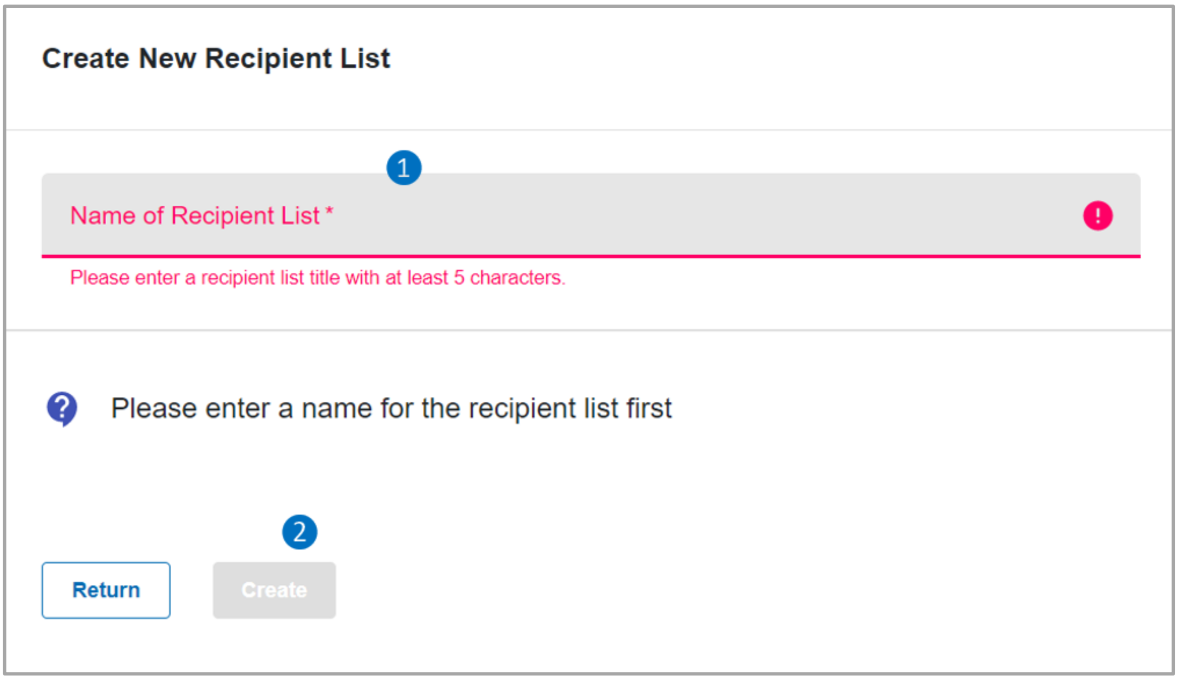


Figure 4- Create New Recipient List

After you created your recipient list, you will be automatically directed to the tab “Edit Recipient List” and you will get a confirmation notification ❶. It is possible to modify the name of the recipient list ❷.

To add recipients to the list, click on “Add recipients” and choose “Select connected recipients” when the supplier already has a connect with your company via SupplyOn Business Directory or choose “Add recipients by e-mail” when the supplier is not connected with your company yet. ❸

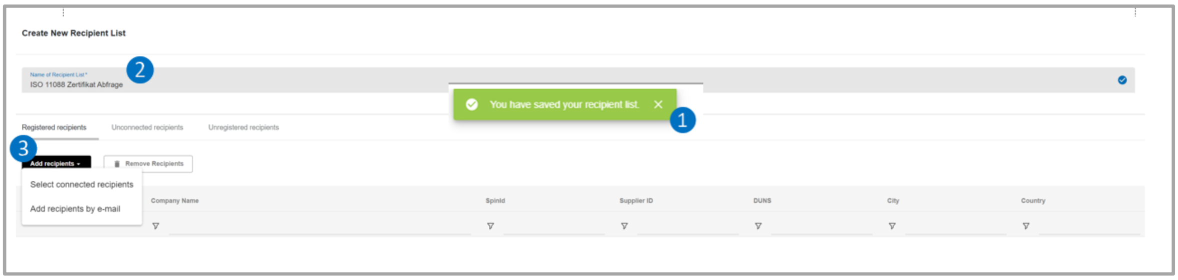


Figure 5- Add recipients to a recipient list

1.2.3.1.1 Explanation of Recipient Lists

Registered recipients	Suppliers that already have a Connect with your company
Unconnected recipients	Suppliers that do not have a Connect with your company but with another company using SupplyOn Business Directory
Unregistered recipients	Suppliers that do not have a Business Directory Connect (or any other service connection) with a company on SupplyOn (We

recommend doing an upload via SLM to get the companies on board that should be addressed.)

1.2.3.1.2 Select connected recipients

When you choose “Select connected recipients” you can use the filter columns to search for a supplier ❶. You can search either by “Company Name”, “Business Service IDs”, “City”, “Country”, “SPIN ID” and also by “Supplier ID”.

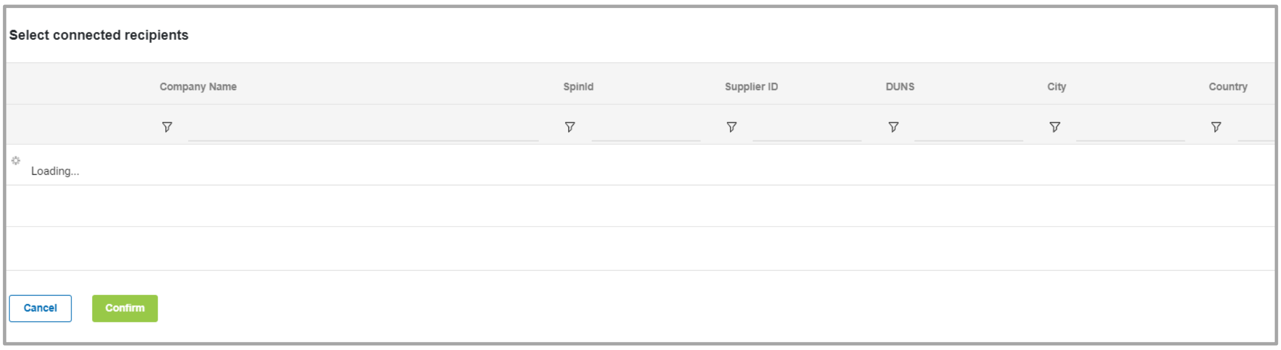


Figure 6 - Filter list of connected suppliers for recipient list

A supplier needs to have at least one of the following roles to receive a survey:

“BusinessDirectorySellerStandard”, “SurveyRecipient”, “CompanyAdmin”

To add a supplier to the Recipient List, click the checkbox. Depending on whether you click the checkbox once ❷ or twice ❸, the supplier is added as follows:

Clicking once ❷: All users of the corresponding supplier company with the role: “BusinessDirectorySellerStandard” are invited. If no user has any of the specific roles, the “CompanyAdmin” will be addressed. This behavior is the same as you already know it from surveys in BD Classic.

Clicking twice ❸: All users of the supplier company are selected.

Clicking a third time: Deselects your previous selection of all recipients and you can manually select one recipient of your choice.

Selecting a specific user: If you want to invite a specific user to the survey, search for the company this person is working for and click on the small arrow ❹ to expand the users of the company. The user needs to have at least the role “SurveyRecipient” to be shown in the user list of the seller company. Search for the specific user and select him/her by ticking the checkbox ❺.

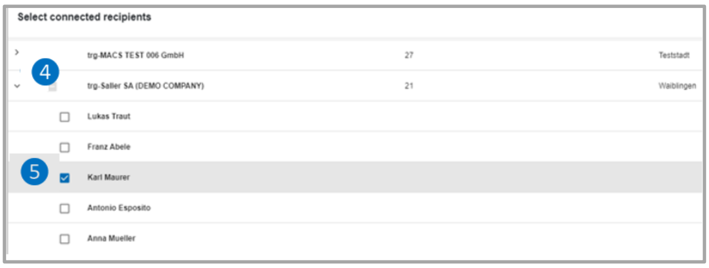


Figure 7 - Selecting a specific user

After you have selected all suppliers you wanted to add to the recipient list, click on the “Confirm” ❹ button. The selected suppliers will appear in the “Registered Recipients” List.

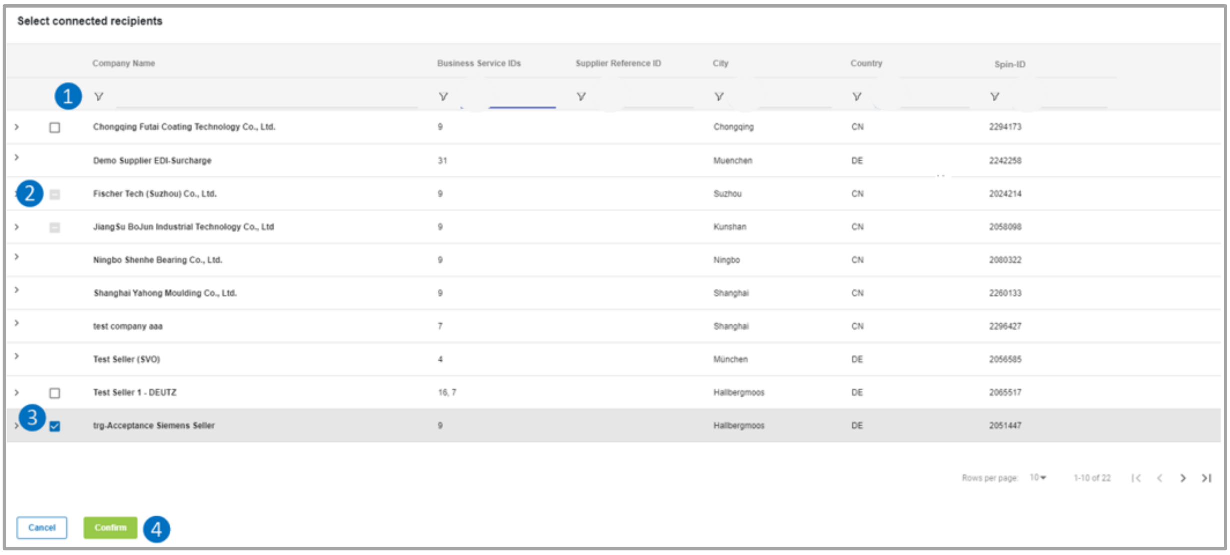


Figure 8 - Select connected recipients

1.2.3.1.3 Add recipients by e-mail

It is possible to invite suppliers that do not have any connect with your company via email. Therefore, choose the option “Add recipients by e-mail” and search for the email address of the supplier ❶. If this supplier does not have any existing connect on the SupplyOn Platform, you will get the notification “No matching users were found” ❷. Afterwards click on “Add unregistered recipient” to add this supplier to your recipient list ❸.

We recommend doing a rollout via SLM before to avoid doubles.

Once the searched E-Mail address already exists as a registered user on our platform, suitable companies are recommended in the list below ❹. In this list you can also search after certain criteria ❺ (Company Name, User name, Company Type, Business Service IDs, Supplier Reference ID, City, Country, SpinID). After you have found the correct supplier in this list, tick the checkbox in front of the supplier name and save it by clicking on the “Add” button ❸.

If there are several users with **one** registered email address, all of them will be displayed and you can choose which user from which company should be invited to the survey.

Please note to redo this procedure for each survey in order not to reinvite suppliers to register again as unregistered supplier.

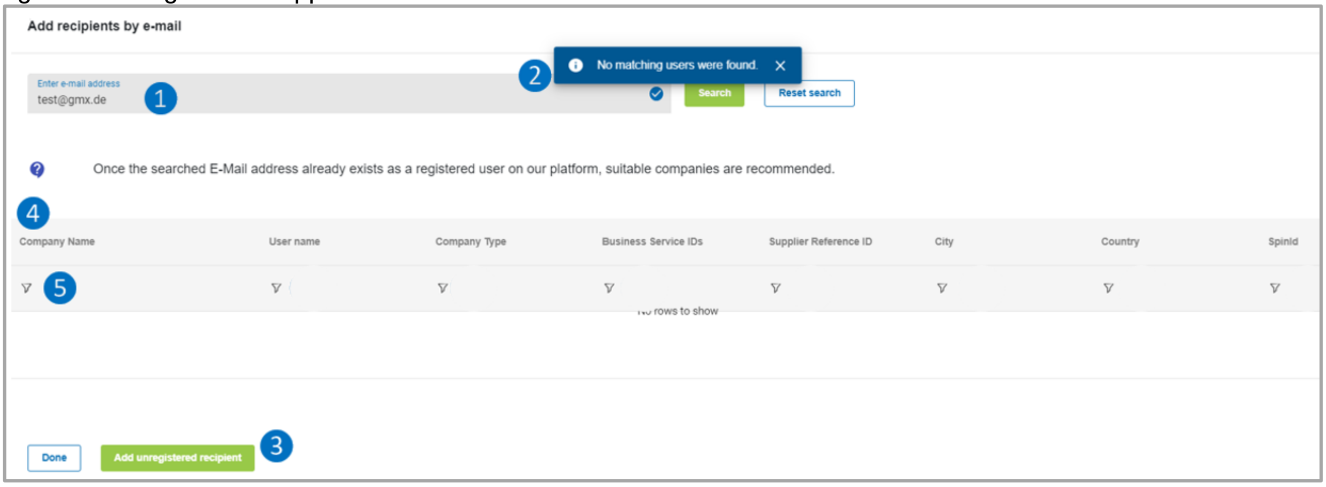


Figure 9 - Add recipients by e-mail

1.2.3.1.4 Save the Recipient List

There is no extra button to save the changes in the recipient list. Just press the "return" button. The changes are saved automatically in the background 1.

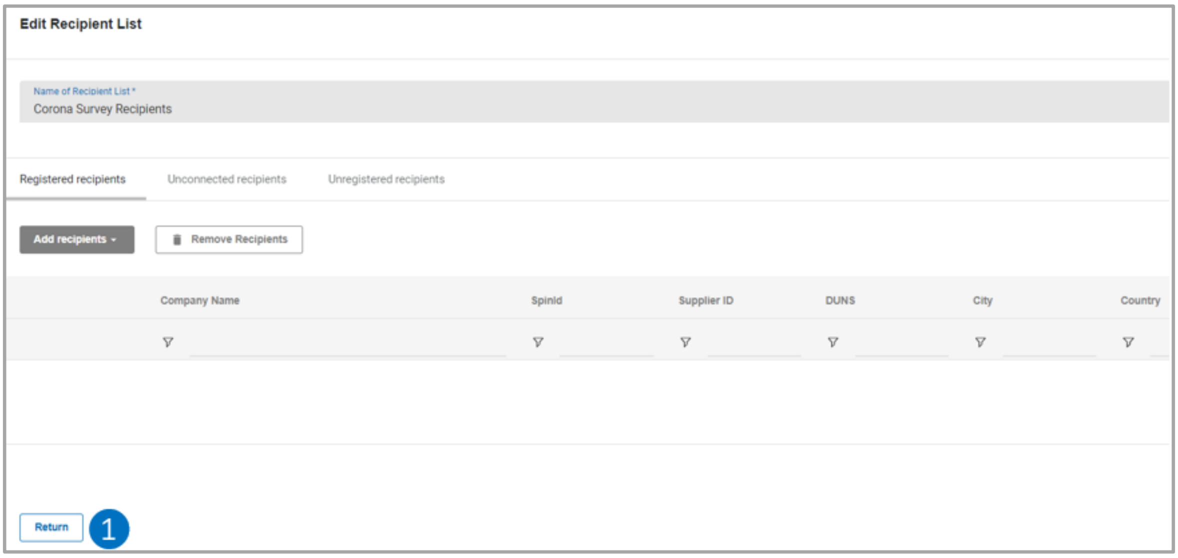


Figure 10 - Saving changes of recipient list

1.2.3.2 Upload a recipient list

Furthermore, you can also create a recipient list by uploading an excel list. Therefore, a predefined excel template is provided on the SupplyOn platform to enter the suppliers and upload the excel file as recipient list afterwards. This helps you if you want to invite many suppliers to a survey instead of manually searching and clicking. Please note to redo this for each survey because the suppliers can be registered after you have done your first survey and invited the as unregistered recipients.

To upload a recipient list, perform the following steps:

Click on the “Upload” Tab in the left column ❶. You will be guided directly to the Upload function for a new Recipient List.

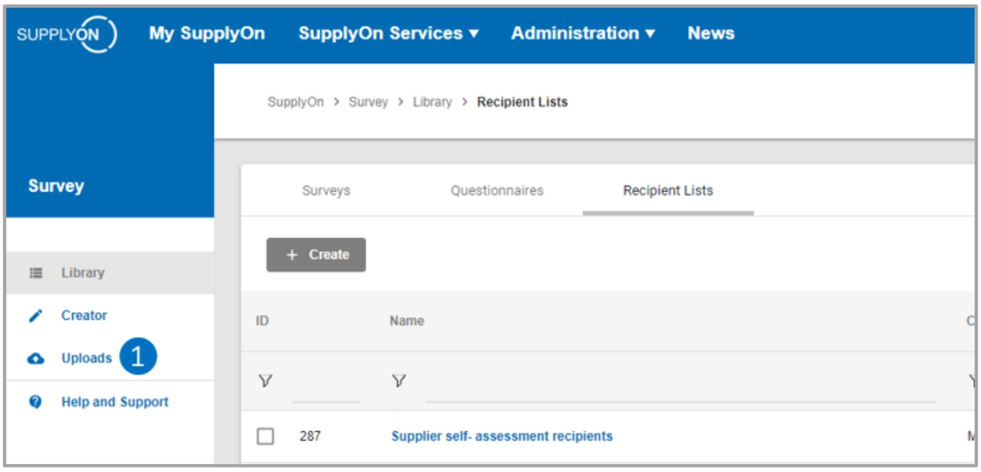


Figure 11 - Upload function for recipient list

Download the Excel Template ❶ and open the downloaded file (the file either appears in the bar at the bottom of your screen or in your download center) ❷.

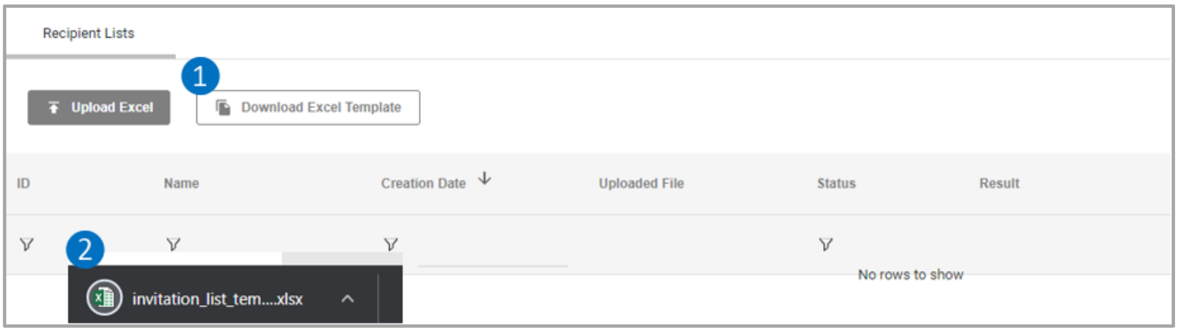


Figure 12 - Download Excel Template for Recipient List

Fill out the excel document either manually or by copying the supplier information into the document ❶. After you have inserted all the suppliers, save the document ❷.

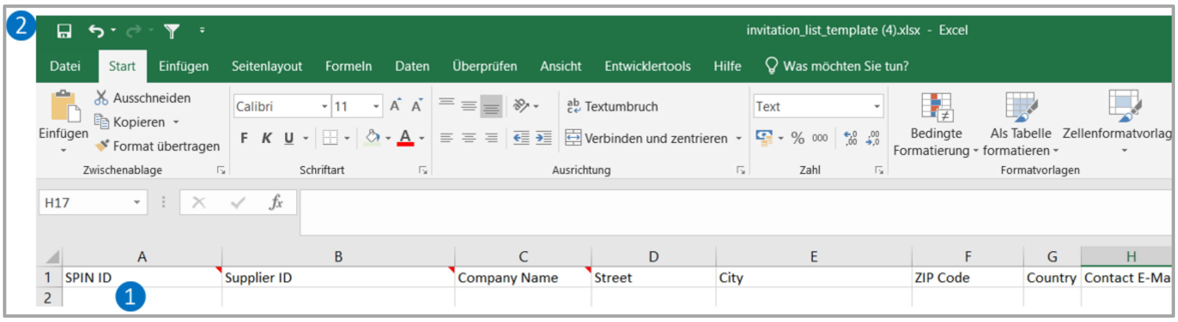


Figure 13 - Inserting suppliers to excel recipient list

If you move the mouse over the headlines or the red triangle ❶ the "mouseover" text will be displayed ❷. This text explains which users are invited to the survey if certain information is entered or missing.

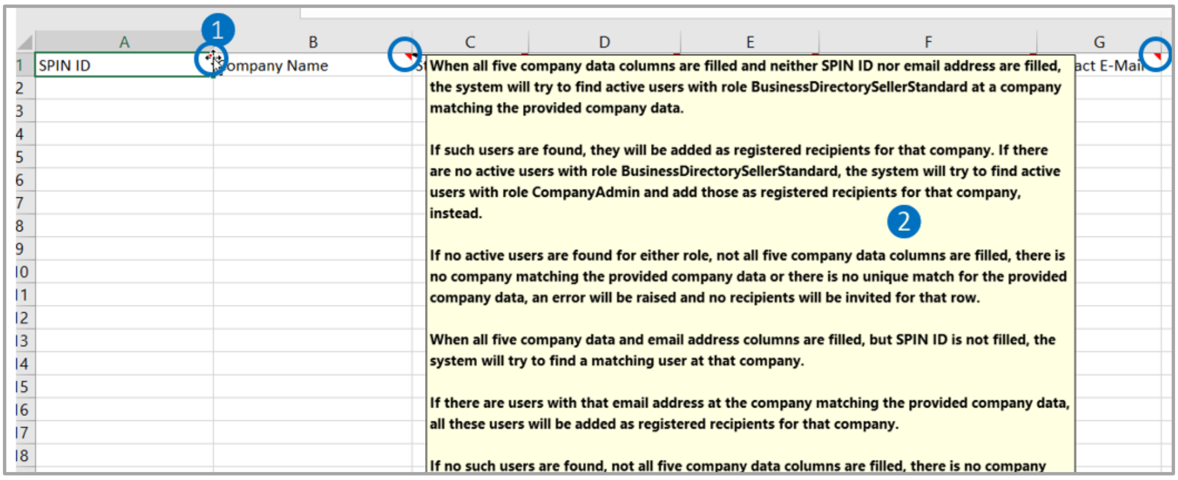


Figure 14 - Excel Recipient List Mouseover Information

<u>Reminder</u>:

As the validation only takes place when you upload a recipient list, please upload the recipient list separately for every survey and do not reuse an existing (already uploaded) recipient list.

Of course, you can use the same file, but it is important to upload the recipient list again.

There are 3 possibilities to enter data and add recipients:

- **Email address:**
  The one(s) who fulfill the following criteria will be invited:
  - If there is no active user found with that specific E-Mail Address:
    → Invitation as an unregistered recipient = Short registration (The E-Mail Address is used for the first time)
  - If the system found an active user with this specific E-Mail Address:
    → All active users (with this specific E-Mail Address) are invited
  - If the supplier has a regular connect with your company AND the invited user (via E-Mail Address) has the roles SurveyRecipient + BDSupplierStandard OR SurveyRecipient + CompanyAdmin the user is invited as a connected recipient and regular user = normal way of login.
    If not: the recipient is invited as an unconnected recipient and token user = „direct "Login via Email-Address + Password possible (The E-Mail Address is **not** used for the first time)

- **Unique identification of the company by inserting the SPIN-ID + email address**
  The one(s) who fulfill the following criteria will be invited:
  - **Is there an active user with this E-Mail address at the supplier company?**
    - **If yes**: Does the supplier have a regular connect with your company?
      - **Yes**: Does the user have the roles SurveyRecipient + BDSupplierStandard OR SurveyRecipient + CompanyAdmin?

        - Yes: Invitation as a connected recipient and regular user = normal way of login.
        - No: Invitation as an unconnected recipient and token user = „direct "Login via Email-Address + Password possible

      - **No**: Invitation as an unconnected recipient and token user = „direct "Login via Email-Address + Password possible

    - **If no**: Error

- **Unique identification of the company by inserting the SPIN-ID:**
  The one(s) who fulfill the following criteria will be invited:

  - **Is there an active user with the role: SurveyRecipient + BDSupplierStandard?**

    - **If yes**: Has the supplier a regular connect to the buyer company?

      - **Yes**: All users with the roles SurveyRecipient + BDSupplierStandard are invited as connected recipients (regular user) = normal way of login.

      - **No:** Invitation of all users with the roles: SurveyRecipient + BDSupplierStandard as unconnected recipient and token user = „direct "Login via Email-Address + Password possible

    - **If no**: Does the supplier have an active user with the role: SurveyRecipient + CompanyAdmin?

      - **Yes**: Does the company have a regular connect to the buyer company?

        - **Yes**: All users with the roles: SurveyRecipient + CompanyAdmin are invited as connected recipients (regular user) = normal way of login.

        - **No**: All users with the roles: SurveyRecipient + CompanyAdmin are invited as unconnected recipient and token user = „direct "Login via Email-Address + Password possible
      - **No**: Error

If there are multiple registered users with **the same** E-Mail address, all users with that E-Mail address will be invited to the survey.

Go back to the SupplyOn Platform, open the "Upload" of the recipient list side again and name the recipient list ❶. Click on "Browse" ❷ and look for that excel file you were just editing. Select it ❸ and click on "open" ❹. In order to save the document, click on the "Upload" Button ❺.

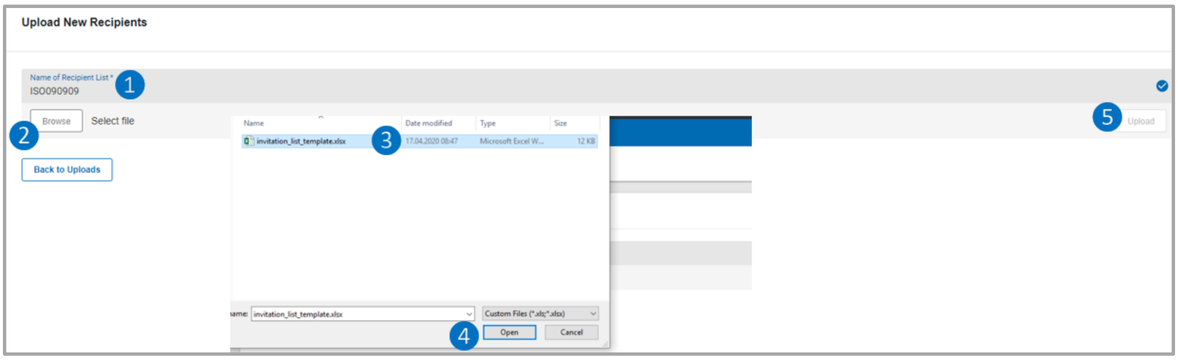


Figure 15 - Upload the recipient list

When the Excel document has been successfully uploaded, a notification appears at the top of the screen ❶. It also appears in the "Status" column that the document has been uploaded ❷.

<u>Please note:</u> When uploading large files, the processing may take a little bit longer.

Click again on "Uploads" button in the left sidebar to update the page ❸.

Now you will see if the Recipient list could be created: "Success" means that the recipient list has been created successfully ❹. By clicking on the name of the recipient list you can open and edit the recipient list. Moreover, you will find this recipient list in the library of the recipient lists.

If the status is "Processing failed", not all recipients listed in the excel could be validated ❺. The table has to be edited before it can be uploaded again (see below).

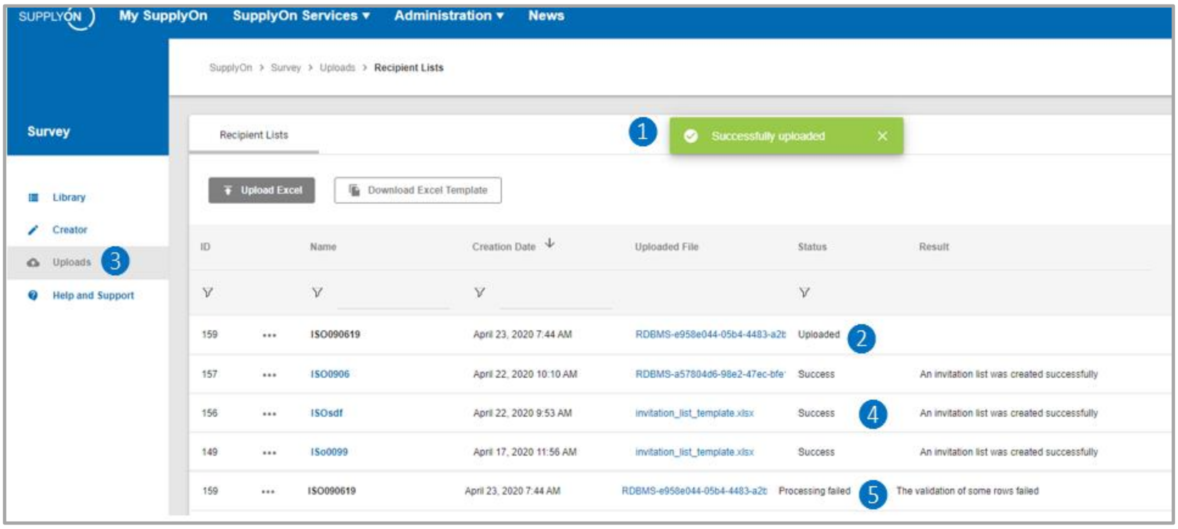


Figure 16 - Status of uploaded recipient list

If the “Processing failed” click on the ••• Symbol ❶ and choose “Download errors (Excel)” ❷.

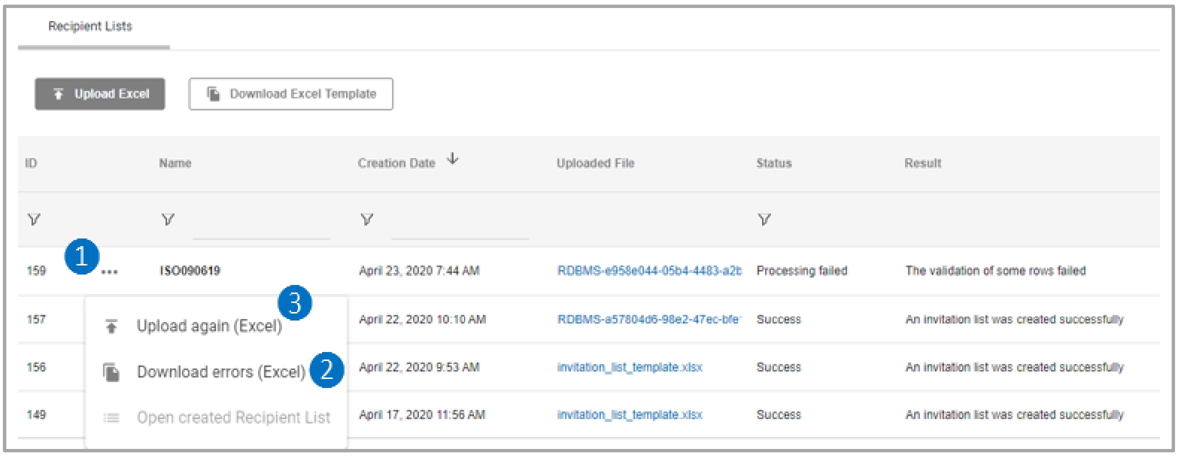


Figure 17 - Download errors if recipient list upload failed

It will open the same recipient list you have already uploaded but with an additional column (H) "Validation Message" ❶. With this you can see which line needs to be corrected. After correcting the error(s) save the Excel file and upload it again as described above.

If the upload was successful click on the name of the uploaded list to see the recipients.
The list will appear – like the manually created lists – in the recipient lists library.

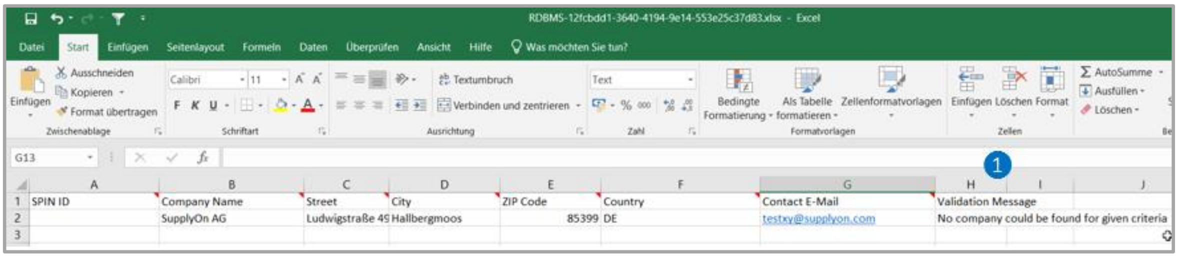


Figure 18 - Download Errors of Recipient List

Here you can find a short explanation of possible errors and the reasons for the failure:

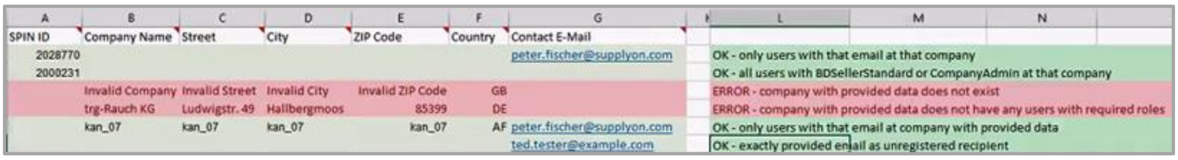


Figure 19 - Example of possible Errors

1.2.3.3 Edit a recipient list

If the survey has not started, it is possible to edit the recipient list. BUT you have to delete and add your recipient list from/to the survey again. Once the survey has started, it is not possible to add a supplier to the recipient list. The only way to add a supplier laterwards is to close the current survey, copy this survey and start it again with the edited recipient list. It is not possible to delete a recipient list, you can only change the name or content of it.

1.2.3.4 Find SupplierID for creation of recipient list

As you can use the SupplierID to add suppliers to a recipient list, it is good to know where you can find a list off all the SupplierIDs of your supplier:

Open “Suppliers`Rollout”:

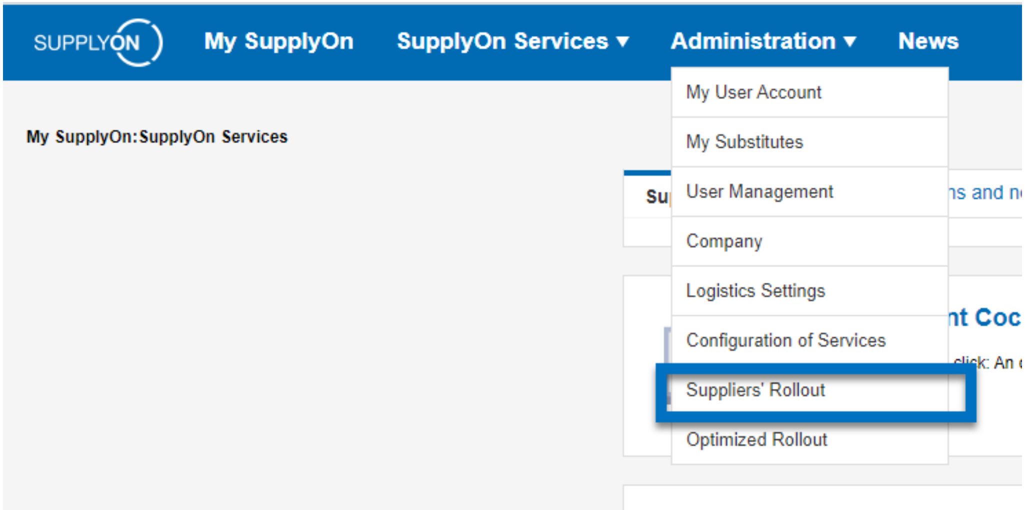


Figure 20 - Find SupplierID for creation of recipient list (1)

Click on “Supplier Overview”:

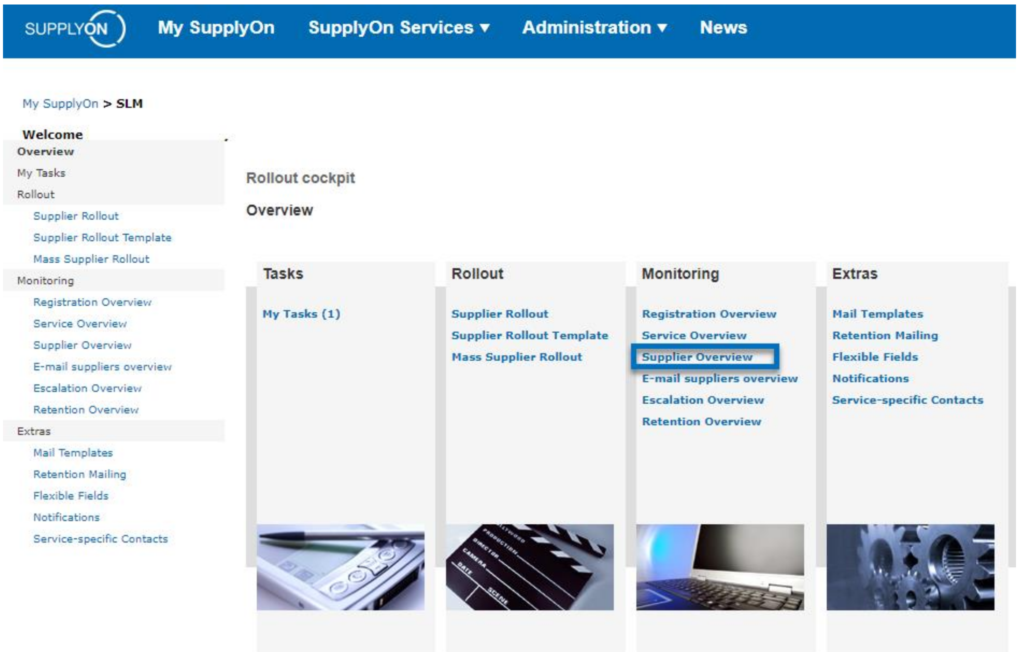


Figure 21 - Find SupplierID for creation of recipient list (2)

Make a wildcard search with " * " or search a special supplier ❶. Filter on the Service "Business Directory" ❷. Afterwards you can download the list as an Excel File ❸. That file will contain the Supplier ID information that you can use for creating the recipient list.

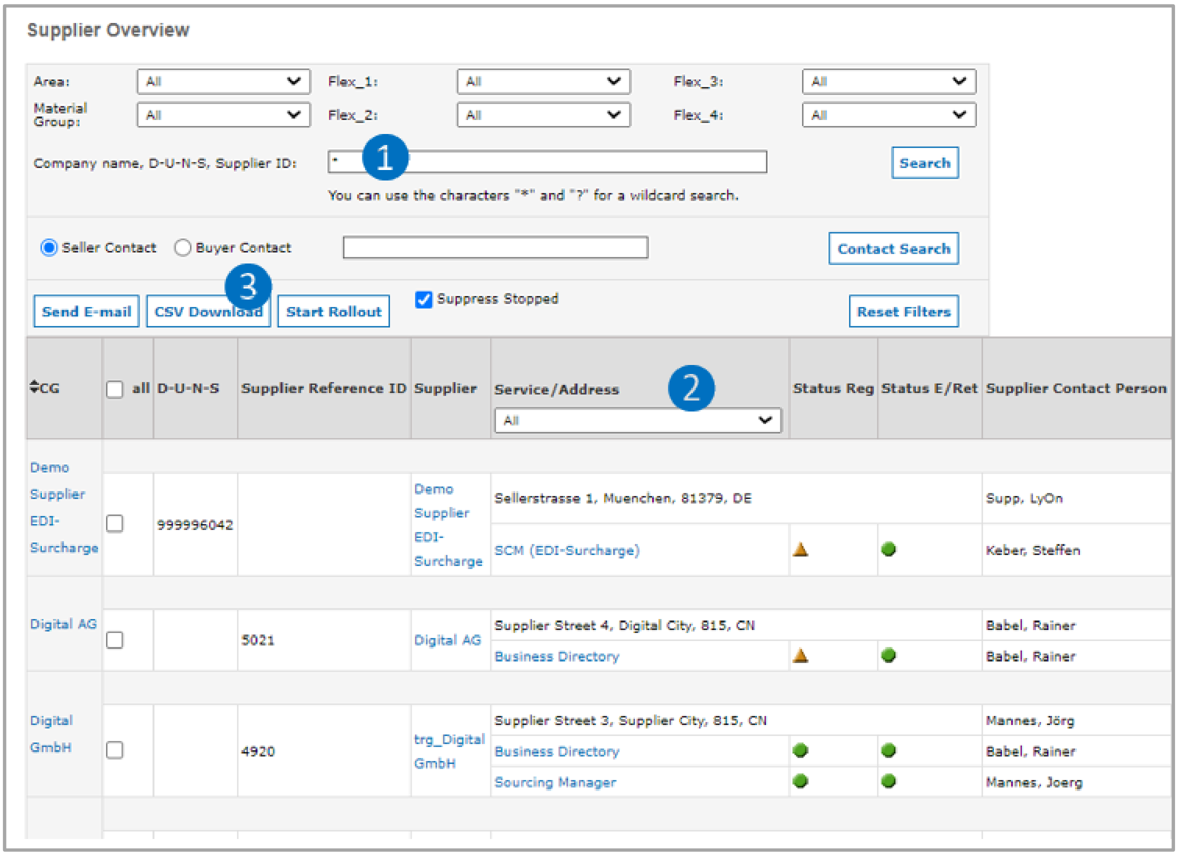


Figure 22 - Find SupplierID for creation of recipient list (3)

1.2.3.5 Copy a recipient list

It is also possible to copy an uploaded and manually created recipient list. Select an existing recipient list by ticking the checkbox ❶ and click on the "Copy" button❷

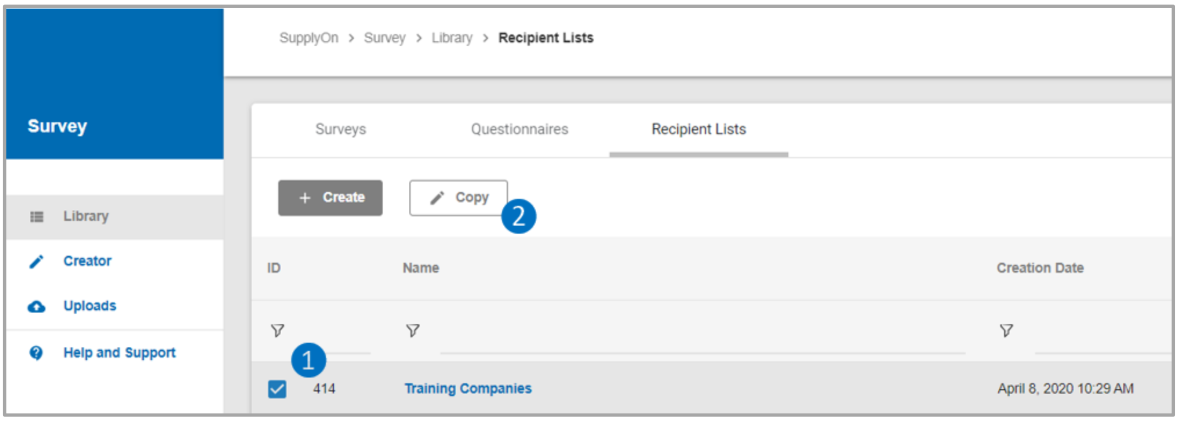


Figure 23 - Copy a recipient list

For regularly repeated Surveys with the same recipient list created some weeks ago, we recommend to create new recipient lists based on the report of the last made survey.

With this method it can be made sure that recipients are not included in two different categories of a survey.

This can happen when recipients are already registered under an e-mail address at SupplyOn and the Creator keeps adding them to the tab “Unregistered recipients”.

1.2.3.6 Notes and FAQs for the recipient list

- The Supplier ID of Continental Automotive AG (CVM) cannot be identified exclusively. Therefore, you should not create your recipient list on base of Continental´s Supplier ID.

1.2.4 Questionnaire

A questionnaire is needed to perform a survey. Within the questionnaire you define what you want to know from the supplier. Questionnaires are created once and can be reused for different surveys.

1.2.4.1 Creating and copying a questionnaire

Basically, there are two ways to create a questionnaire. Open the tab “Questionnaire” ❶ and:

- Use the “Create” Button ❷

  OR

- Select an existing questionnaire by ticking the checkbox ❸ and click on the “Copy” button ❹. The copy can be edited individually and is completely detached from the questionnaire from which it originated.

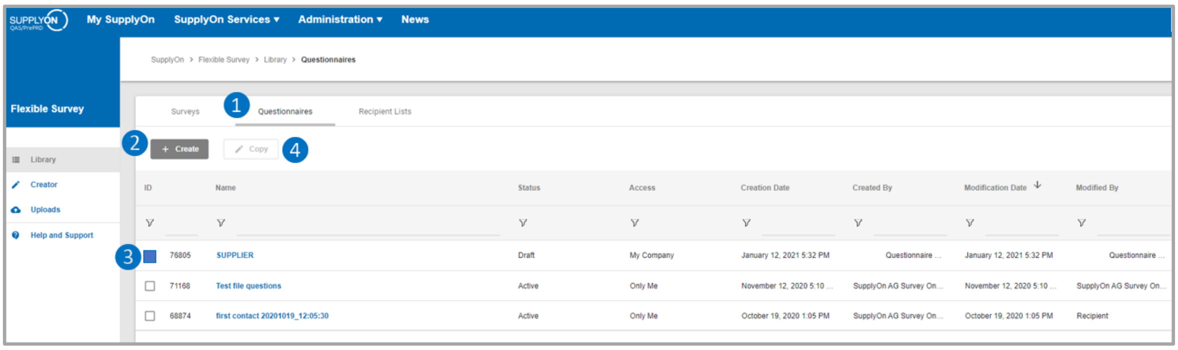


Figure 24 - Options to create a questionnaire

1.2.4.1.1 Overview Survey Designer

Below is a brief overview of the individual elements on the "Survey Designer" page:

➊: Here you can see the different question types. By dragging and dropping you can add a question (in the selected type) to your questionnaire

➋: This allows you to undo or redo individual edits.

➌: Set the title for your questionnaire by clicking on “Set Title” (see 2.2.4.1.3 Edit survey settings)
➌*: The title is displayed here

➍: Here you can edit the page title (3 ways to change it)

➍*: The page title will be shown here

Figure 25 - Overview Questionair

1.2.4.1.2 Create a new questionnaire

If you want to create a new questionnaire click on the “Create” Button as explained above. The “Survey Designer” Tab ➊ will open automatically.

1.2.4.1.3 Edit questionnaire settings

By clicking on “Set Title” ❷ the right sidebar will pop up, where you can add a title for your questionnaire ❸. The predefined language is English. This can also be changed here ❹. The settings are automatically saved, you do not have to press any special save button.

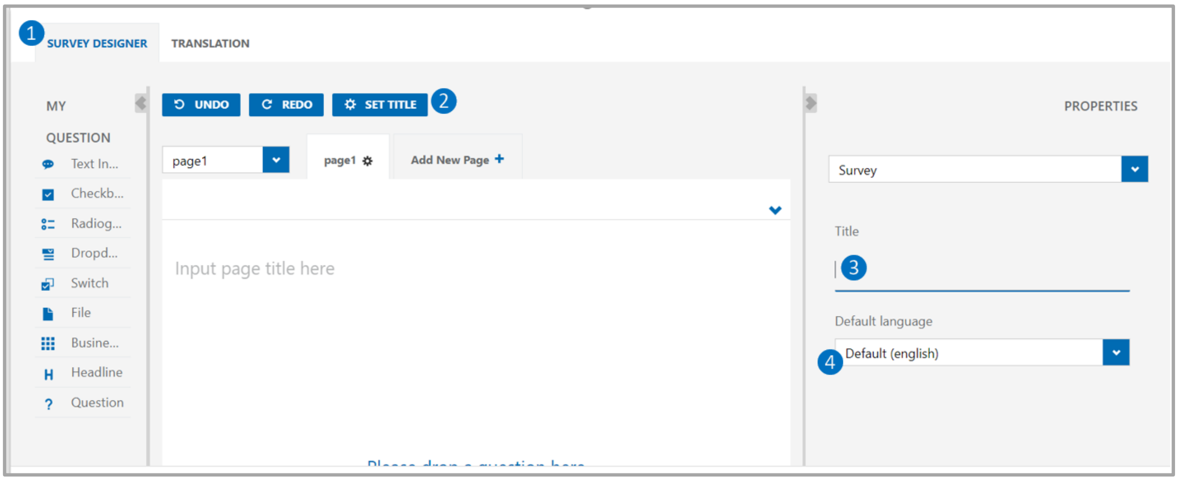


Figure 26 - Edit questionnaire settings

1.2.4.1.4 Add, Modify and Select Pages

The questionnaire consists of minimum one page. In order to structure our questionnaire, use pages. You can add them by clicking on the plus symbol ❶ or in the dropdown page overview ❷. You can edit the name / delete the page / copy the page by clicking on the “gear symbol” ⚙ ❸. The page title can additionally be changed in the side bar ❹.

The selection of pages can be done either directly in the questionnaire ❷ or in the sidebar ❹.

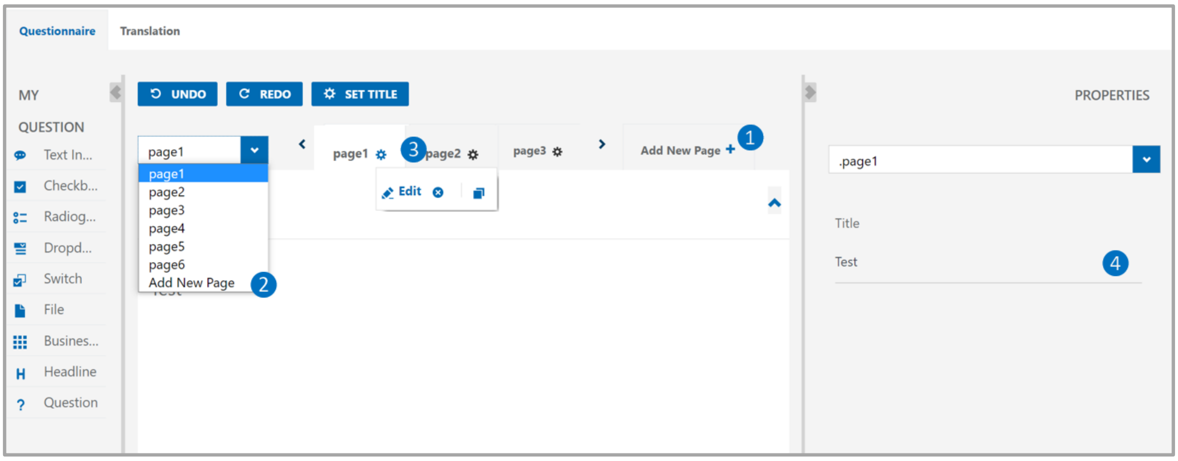


Figure 27 - Add, Modify and Select Pages

1.2.4.1.5 Add Questions to Questionnaire and change question order

The several question (types) can be added with dragging and dropping the question (type) into the questionnaire space below the questionnaire and the page title ❶. As soon as the field is dropped, it can be modified. Moreover, the options for modifying the page will change into the editing bar for the question ❷.

The question order can be easily modified by dragging the question from the questionnaire to the desired position and dropping it there.

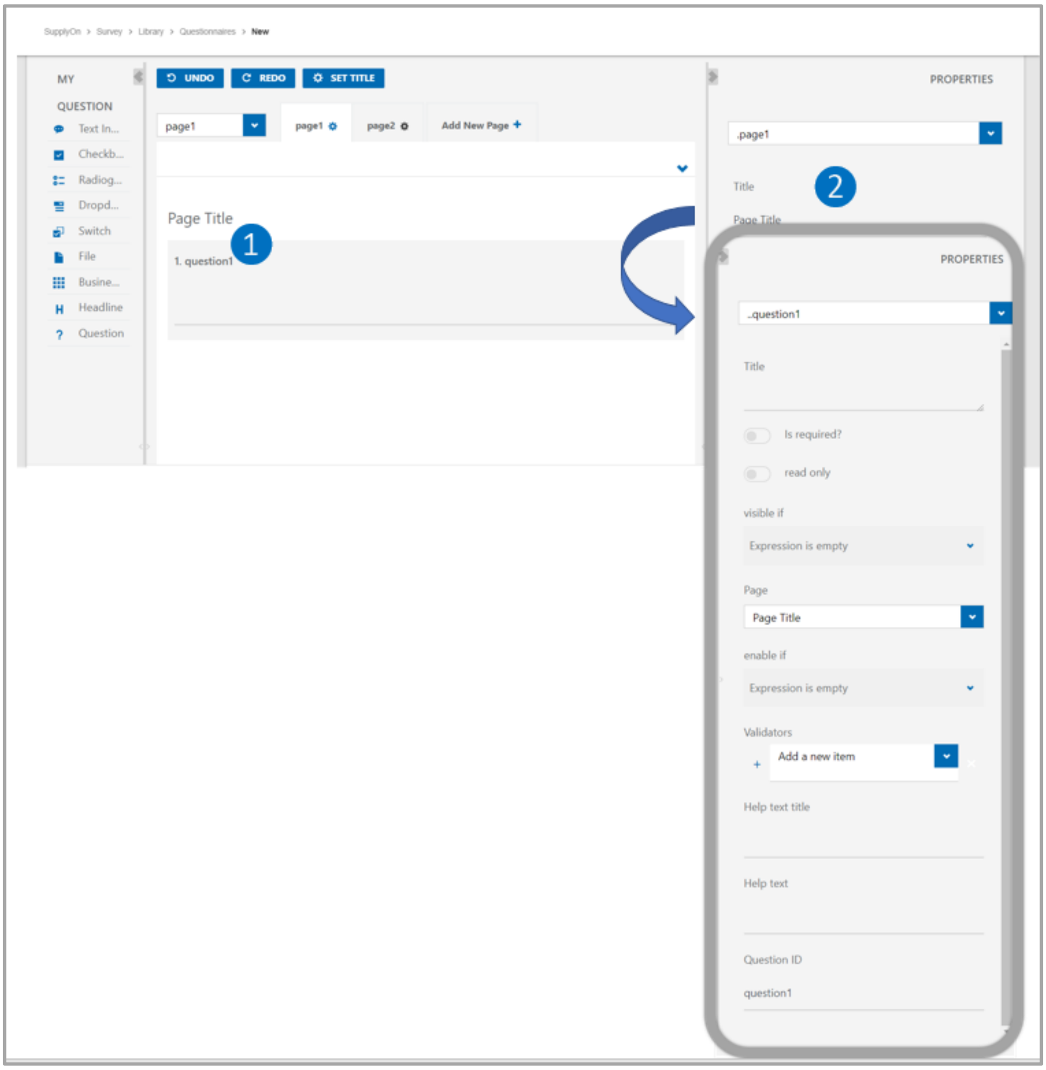
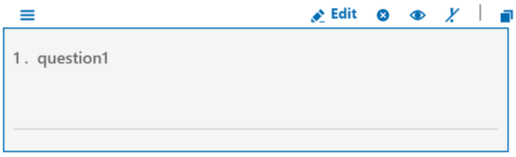


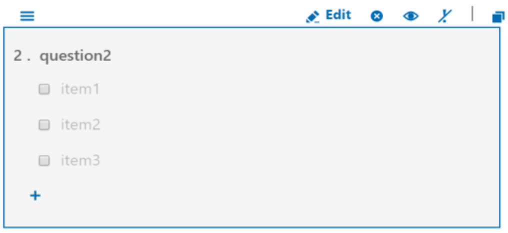
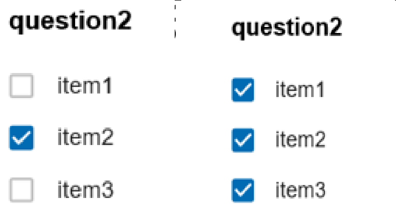
Figure 28 - Add Questions to Questionnaire

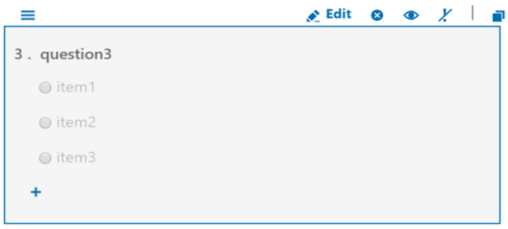
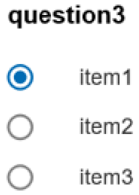
1.2.4.1.6 Explanation of Question Types

Below you can find an overview of all question types that can be used for the questionnaire:

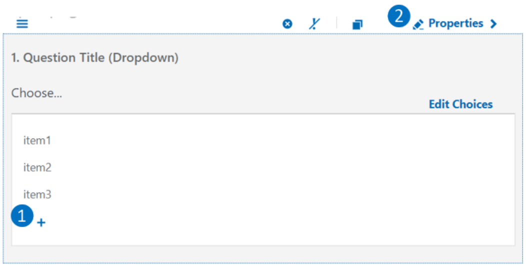
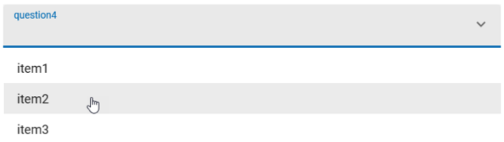
<table>
<tr><th>Type</th><th>Buyer View</th><th>Seller View</th></tr>
<tr><td>Single Input

With this question type you can ask questions that have individual possibilities for an answer. The question can be answered individually by inserting any text.</td><td></td><td></td></tr>
<tr><td>Checkbox

Question possibility with predefined answer options, where one or more answers can be selected.</td><td></td><td></td></tr>
<tr><td>Radiogroup

Question possibility with predefined answer options, where only one answer can be selected.</td><td></td><td></td></tr>
<tr><td>Dropdown

For the question "Dropdown" any number of possible answers can be given. To add answer choices, click on the "+" Symbol ❶. Question settings can be made by clicking on "Properties" (the right sidebar will open, see here) ❷

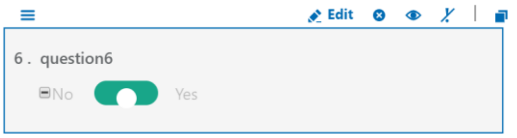
To change the question options❷, click on an answer choice and edit the text. By clicking on the X-symbol the answer choice can be deleted. In order to answer the question laterwards in the survey, the respondent can choose only one option of the predefined answers.</td><td></td><td></td></tr>
</table>

<table>
<tr>
<td>

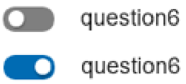
SWITCH

THE SWITCH TYPE IS USED IF THE ANSWER OPTIONS OF A QUESTION REPRESENT A "YES/NO" OR "TRUE/FALSE" CHOICE.

</td>
<td>



</td>
<td>

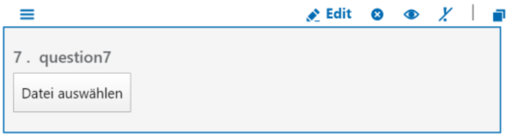


</td>
</tr>
<tr>
<td>

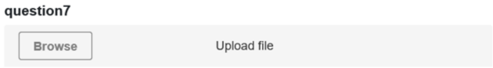
File

This question type asks the respondent to upload a document.

</td>
<td>



</td>
<td>



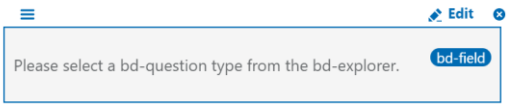
</td>
</tr>
<tr>
<td>

Business Directory Field

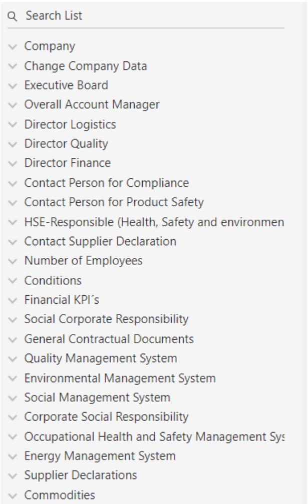
Requesting special data that is automatically imported into the SupplyOn Business Directory tool. The question types depend on the different Business Directory field types. The text of BD-Fields is already predefined and you cannot change it. After you have selected the question type BD-Field you have to select on the right side by using the BD-Field Explorer which field should be shown. Please note that you have to drag each field of every section one by one and that each field can only be added once to your questionnaire. Only the connected suppliers can see and fill out the BD fields.

BD-Fields that are dragged into the questionnaire now have the group name as additional identification shown.

</td>
<td>



</td>
<td>



</td>
</tr>
</table>

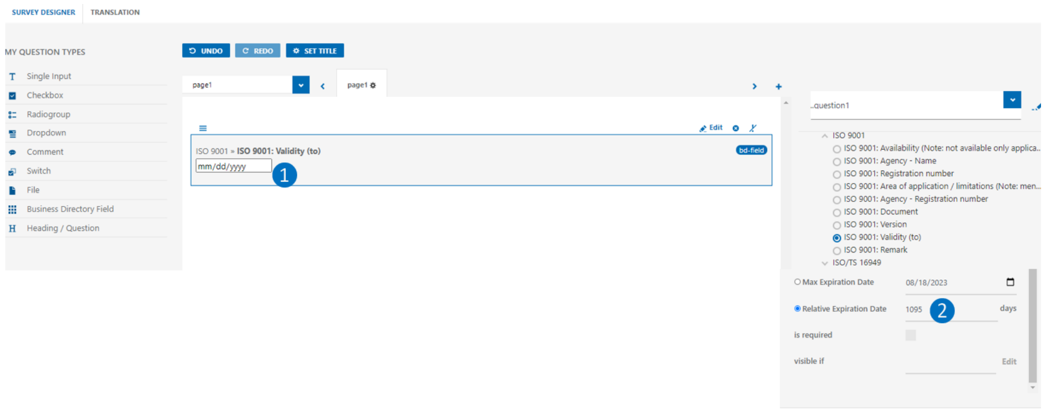
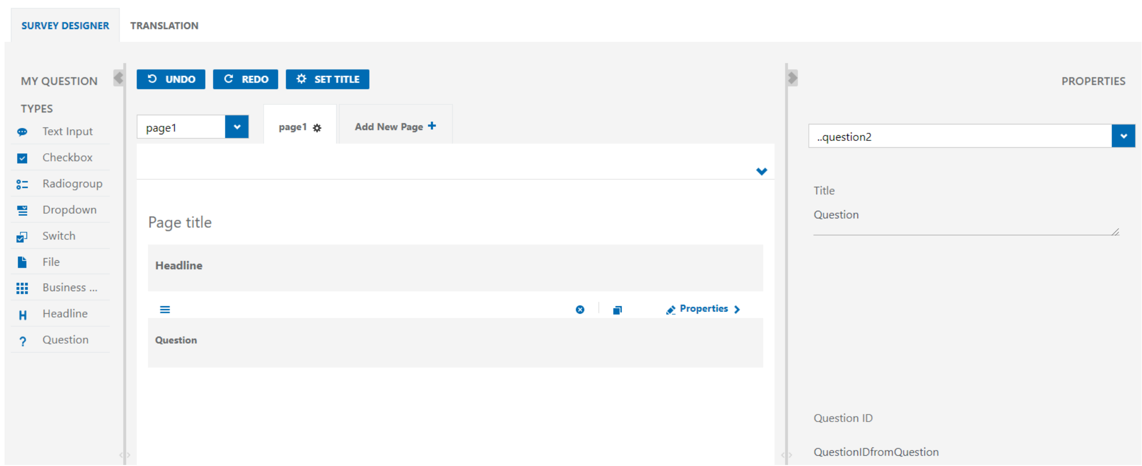
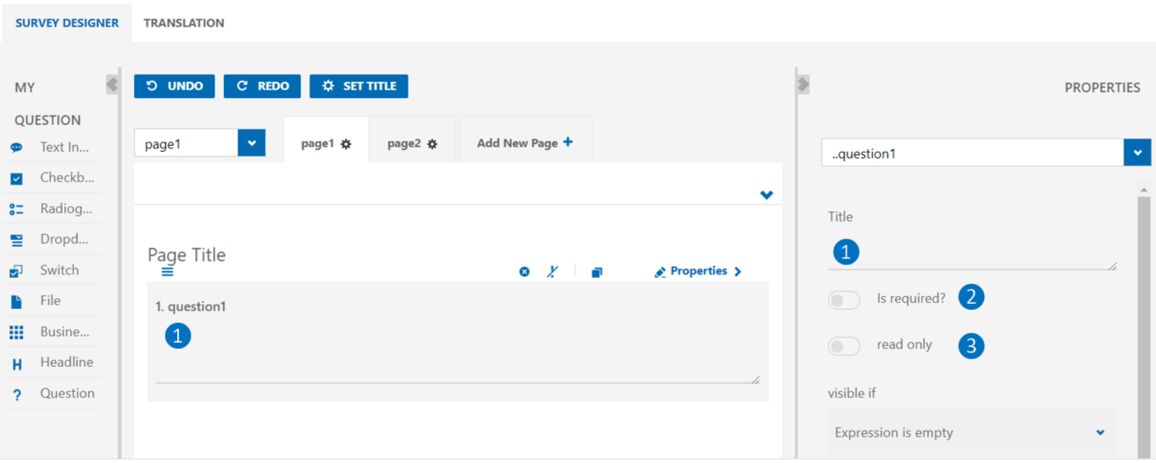
Remind for Certificate BD field: Relative Date: You can decide for how long a certificate is max. valid ❶. This timespan runs after a supplier opens the survey (=relative expiration time) (the time-span is calculated automatically into the future when the supplier opens the survey) ❷.	
Headline/Question This question type is used to structure the questionnaire by inserting headings. Difference between headline and question: The two fields are displayed in two different font sizes. The overall sorting order in descending size is as follows: **Page Title > Heading > Question**	

Table 2 - Explanation of Question Types

1.2.4.1.7 Explanation of the symbols in the editing bar

Moreover, the questions can be edited individually. Below you will find an overview of the meaning of the individual symbols.

Type	
Edit GENERAL ❶ It is possible to give each question a title, which makes it easier to search for the question when creating the survey ❷ To mark the question as a mandatory field, the check mark must be set. ❸ You can also make the question a “read only” field. No answers can be given then.	

VISIBLE IF

❶ Is a function where a question is linked to an answer of another question. This makes it possible to make the question visible only when a certain answer is given to another question.

❷ Click on “build” and select the question whose answer determines whether the current question should be displayed for answering.

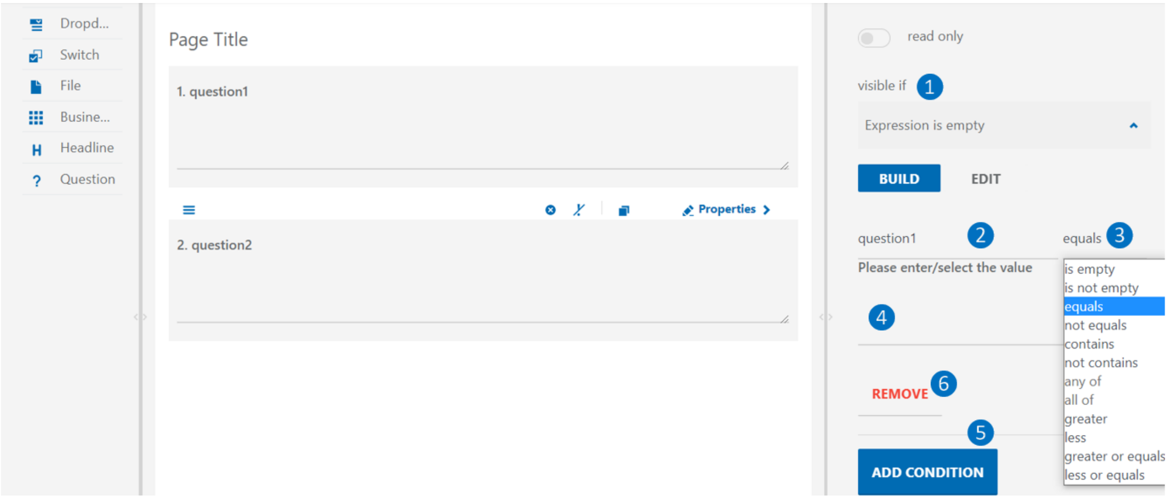
❸Select a condition

❹ Add the value of the condition

❺ Click on “add condition” to save it.

❻ You can also remove the condition again.

(see 1.2.4.1.8 Visible if/ Enable if function)



❶ "Enable if" is a function where a question is linked to an answer of another question. This makes it possible to unlock the question for editing only if it is linked to a specific answer of another question. Conditions can be set like for "Visible if". (see 1.2.4.1.8 Visible if/ Enable if function)

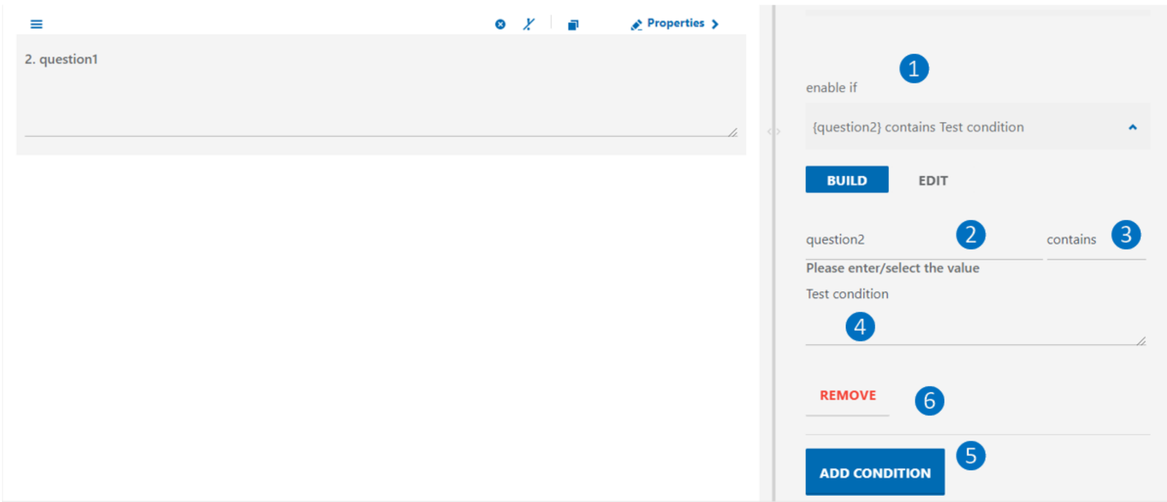
❷ Click on "build" and select the question whose answer determines whether the current question should be displayed for answering.

❸Select a condition

❹ Add the value of the condition

❺ Click „add condition" to save it.

❻ You can remove the condition again.



VALIDATORS

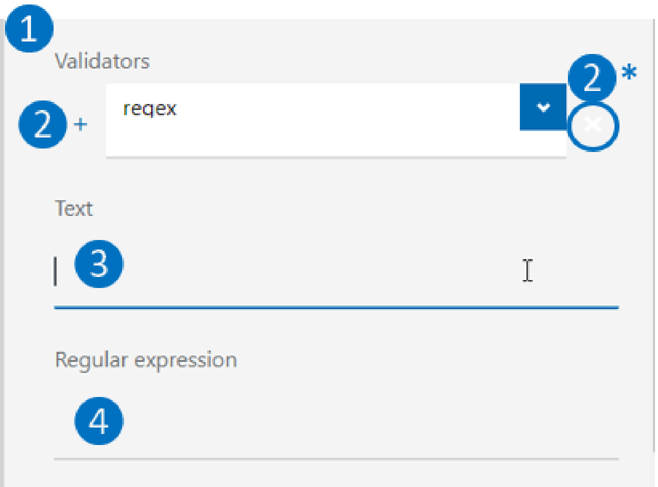
❶ In the tab "Validators" you can define and select in which way the question is answered. Selection options are: Numeric (1,2,3, …), text (a,b,c,d, …), user count, regex (regular expression), e-mail.

❷ Please click on the plus symbol to make your selection. Select the desired option.

❷* You can delete the validator with the " - " sign.

❸ Text: Can be combined with the length and raises an error if min/max length of answer are not reached.

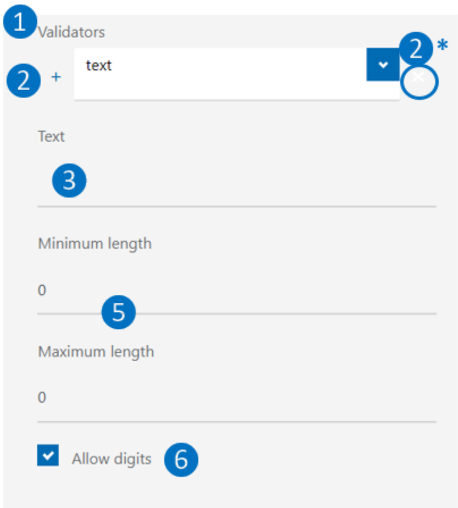
❹ Regular expression: Can be used to enter your own RegEx patterns to check, whether the answer suits your needs (e.g. expression: "{price} * {quantity} >=

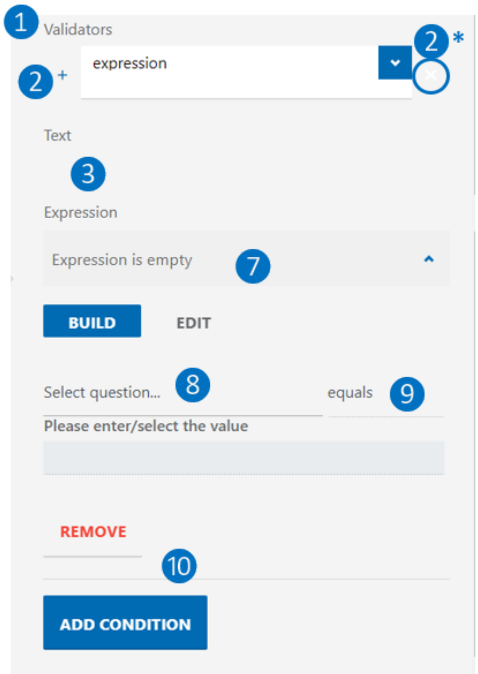


<table>
<tr>
<td>
100". Would raise an error if the summary is less than 100).

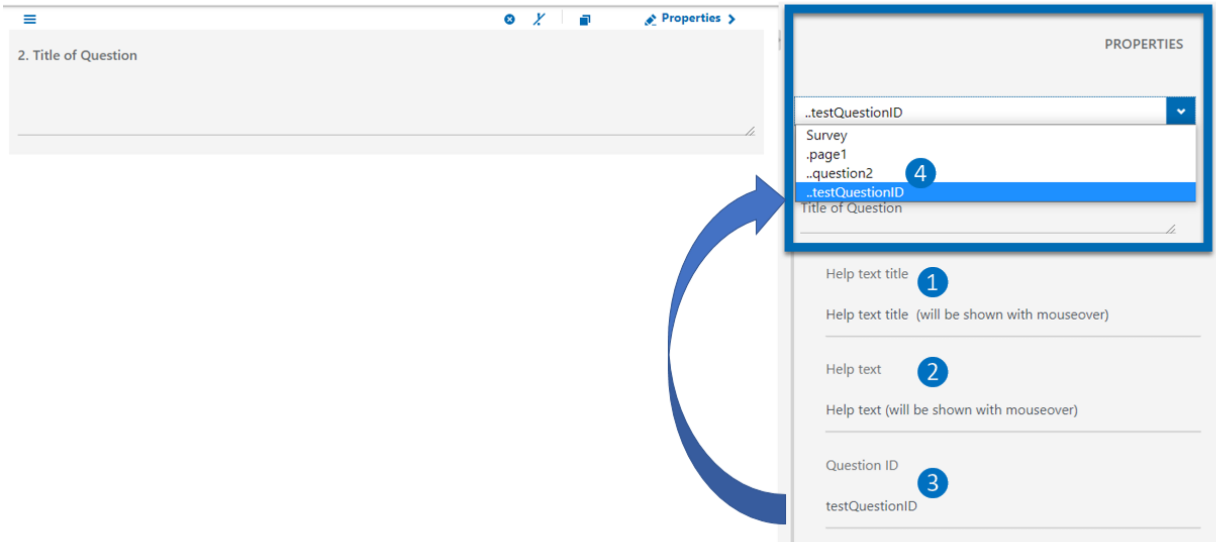
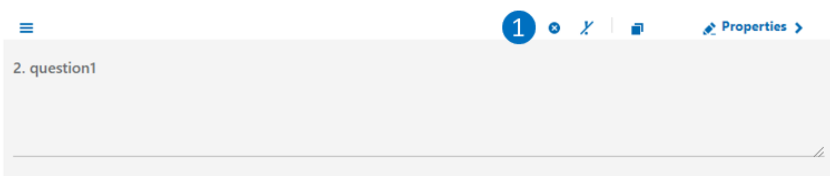
❺ You can define the min. + max. length of the text.
❻ Here you can define if digits in the text are allowed
❼Expres-sion:Here you can select the refence question and the conditions.

❽Click on “build” and select the question whose answer determines whether the current question should be displayed for answering.
❾Select a condition and add the value of the condition

❿Click “add condition” to save it and “remove” to delete it.
</td>
<td>




</td>
</tr>
</table>

① + ② Insert an Help Text (+Title) if your question is in need of an explanation (e.g. note to insert a distance in km, which currency, etc.) You will not see the help text while editing the questionnaire but the person who fills out the survey will see the text next to the question(s). ③ Always assign a QuestionID. You will need this to make references or conditions to a question later. ④ The Question ID will also be displayed here.	
Delete Question To delete a question, click on the icon ①.	

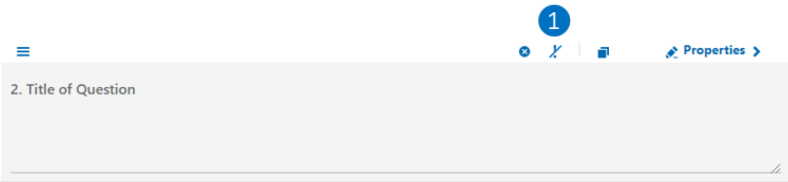
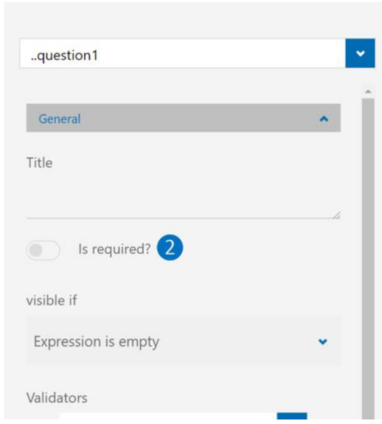
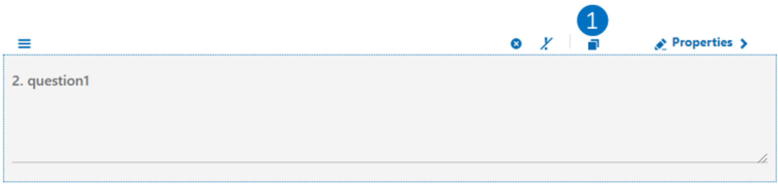
IS REQUIRED / IS NOT REQUIRED 1 Decide here if a question should be mandatory (also possible in the right-side bar 2) **Not mandatory** is set by default	
Copy 1 You can also copy a question by clicking on this symbol. Afterwards you can choose the position via drag and drop.	

Table 3 - Explanation of the symbols in the editing bar

1.2.4.1.8 Visible if function

“Visible if” is a function where a question is linked to an answer of another question. This makes it possible to make the question visible only when a certain answer is given to another question.

It is possible to set conditions to make the questions dependent on each other.
If you want to show and hide questions, it is recommended to use only the "visible if" dependency.

In order to use the “Visible if” function perform the following steps:

Select a question for which the following question should receive a condition ❶. The sidebar will open afterwards.

To simplify the handling, it is a good idea to give every question a suitable ID for recognition. For a condition (visible if or enable if) select the reference question (the question to be used in the condition). Here the Question ID that you gave the question in a step before, is displayed ❷. Afterwards choose the type of condition you want to make ❸ and insert the value of your condition in the text field ❹. Then either click on “add condition” ❺ to save it or on” remove” to delete the condition❻.

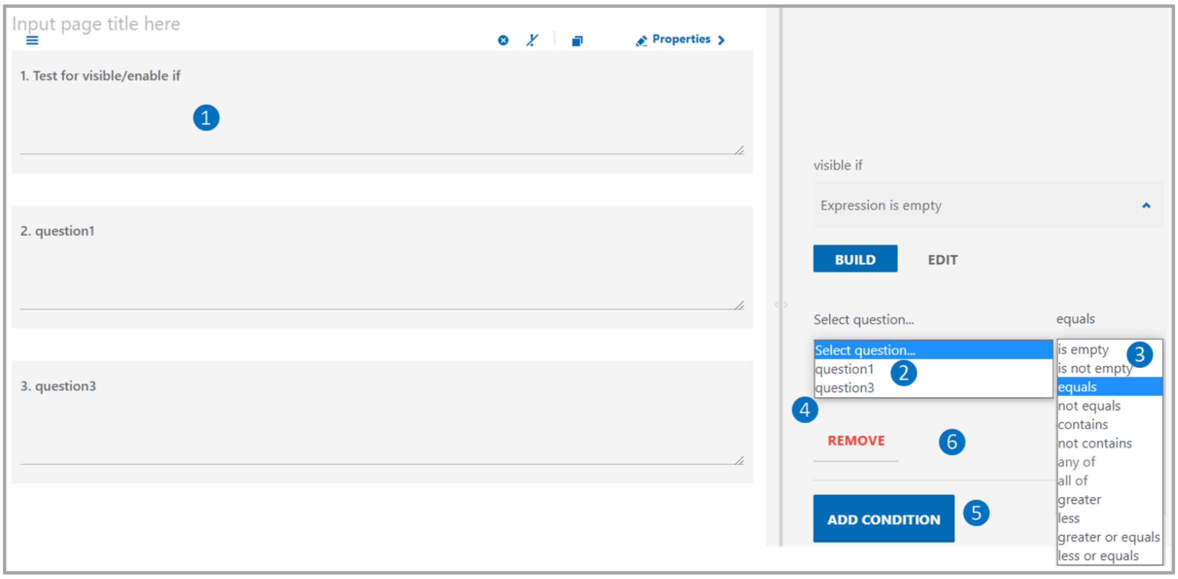


Figure 29 - "Visible if" function

1.2.4.1.9 Visible function with BD-Fields

If your condition for the visibility of your question contains a BD field you have to proceed as described below:

The question that will later have a “visible if” condition ❶ needs the QuestionID of the question that is used for the condition (here a BD-Field Question). This is, because a BD Field question is not shown in the selector like you learned in the chapter 1.2.4.1.8. Visible if / Enable if function.

To find out the Question ID, click on the question that will later be used in your condition ❷. In the sidebar in the upper right corner you will see the QuestionID ❸.

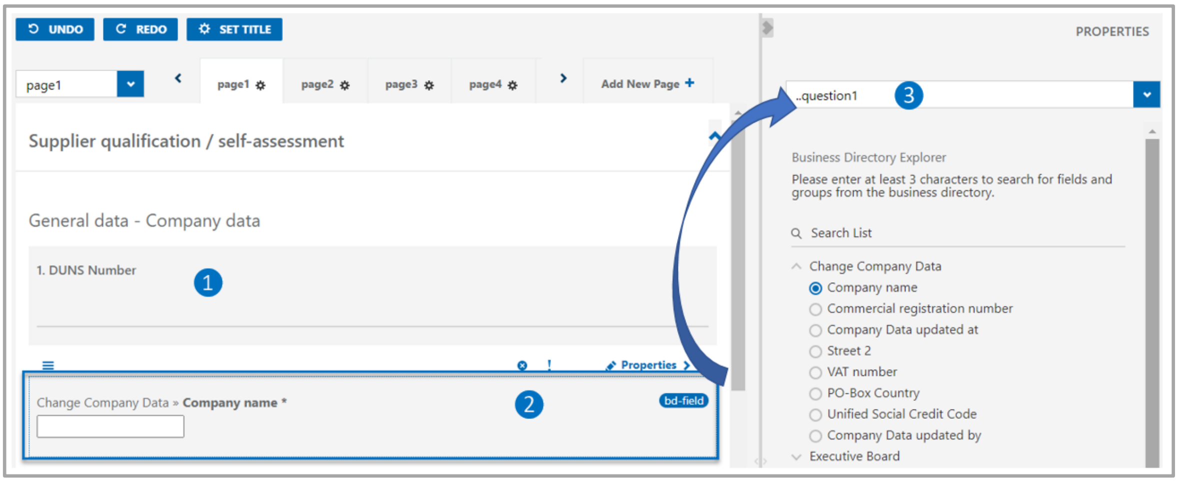


Figure 30 - Visible if / Enable if function with BD-Fields (1)

Then click again on the question that should contain the condition ❹. Select now in the area "visible if" **NOT** " Build" but instead **choose "Edit"** ❺**.** Afterwards insert the condition into the text field, which consists of the QuestionID and the expression ❻ (see listing in the table below).

The expressions are the same as for other conditions. So, you can also test the expressions in the " Build " section from within a condition using a non-BD field and then copy the condition afterwards.

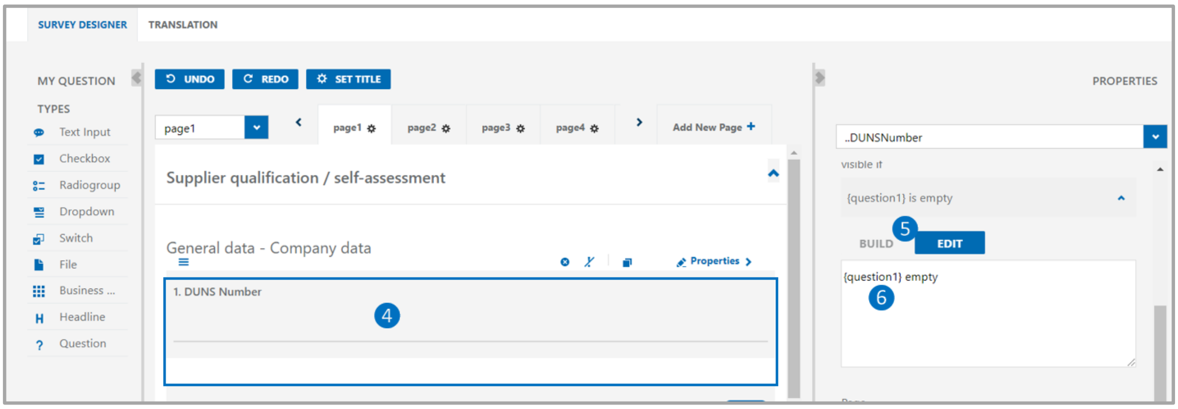


Figure 31 - Visible if function with BD-Fields (2)

EXPRESSION OF CONDITION	EXAMPLE	COMMENT
is empty	{question1} empty	Question is shown/enabled when “question1” is empty.

is not empty	{question1} notempty	Question is shown/enabled when “question1” is not empty.
equals	{question1} = [item2] {question1} = ['item2', 'item3', 'item4', 'item5'] **OR** {question1} = 'Test value or Number '	Question is shown/enabled when “question1” is exactly the value: [item2] **OR** is exactly the item list ['item2', 'item3', 'item4', 'item5'] **OR** 'Test value or Number '
not equals	{question1} <> [item2] {question1} <> ['item2', 'item3', 'item4', 'item5'] **OR** {question1} <> 'Testvalue or Number '	Question is shown/enabled when “question1” is not exactly the value.
contains	{question1} contains 'test' **OR** {question1} contains 'item5'	Question is shown/enabled when the answer of “question1” contains **one value** of a list of values or contains a specific value/number.
not contains	{question1} notcontains 'test' **OR** {question1} notcontains 'item5'	Question is shown/enabled when the answer of “question1” contains **not a specific value** of a list of values or a specific value/number.
any of	{question1} anyof ['item4', 'item2', 'item1', 'item3']	Question is shown/enabled when “question1” is answered with **one** of the (in the condition) mentioned items.
all of	{question1} allof ['item1', 'item2', 'item3', 'item4', 'item5', 'item6']	Question is shown/enabled when “question1” is answered with **all** of the (in the condition) mentioned items.
greater	{question1} > 34	Question is shown/enabled when “question1” is

		answered greater than a selected value.
less	{question1} < 34	Question is shown/enabled when “question1” is answered less than a selected value.
greater or equals	{question1} >= 34	Question is shown/enabled when “question1” is answered greater or equal than a selected value.
less or equals	{question1} <= 34	Question is shown/enabled when “question1” is answered less or equal than a selected value.

Table 4 - Expressions of Conditions

1.2.4.1.10 Translation of Questionnaire

The default language of the questionnaire is always English. Please select your preferred default language before filling out the questionnaire. In order to change the default language, click on “Set title” ❶ and select the language ❷.

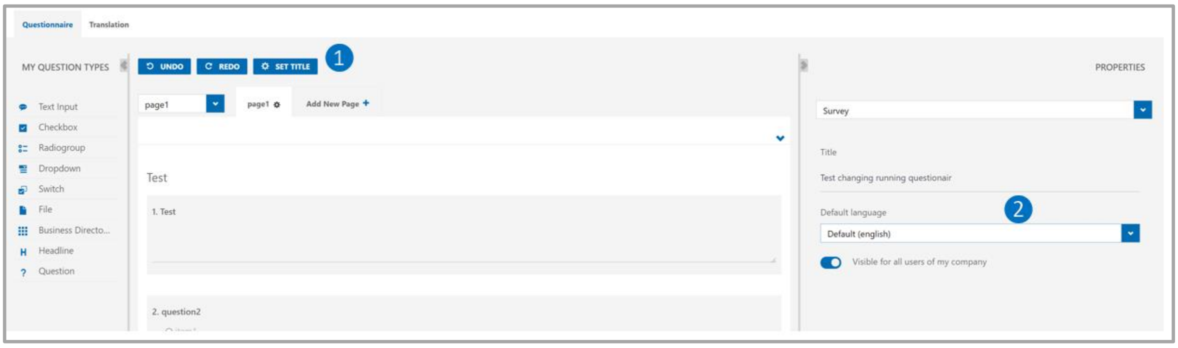


Figure 32 - Select default language

If you want to change the default language later add your preferred default language as described below. Afterwards repeat the steps above (Click on “Set title” select default language) and open the tab “Translation” ❶. Afterwards press the button “REPLACE STANDARD TRANSLATION”. The duplicate language will then disappear (e.g. here: “Default (deutsch)” will remain “deutsch” will disappear) ❷.

Figure 33 - Change default language

To translate the questionnaire, open the tab "Translation"❶. The pages of the questionnaire ❷ will be displayed, as well as the titles of the pages ❸ and the individual questions ❹ on each page and their possible answers ❺.

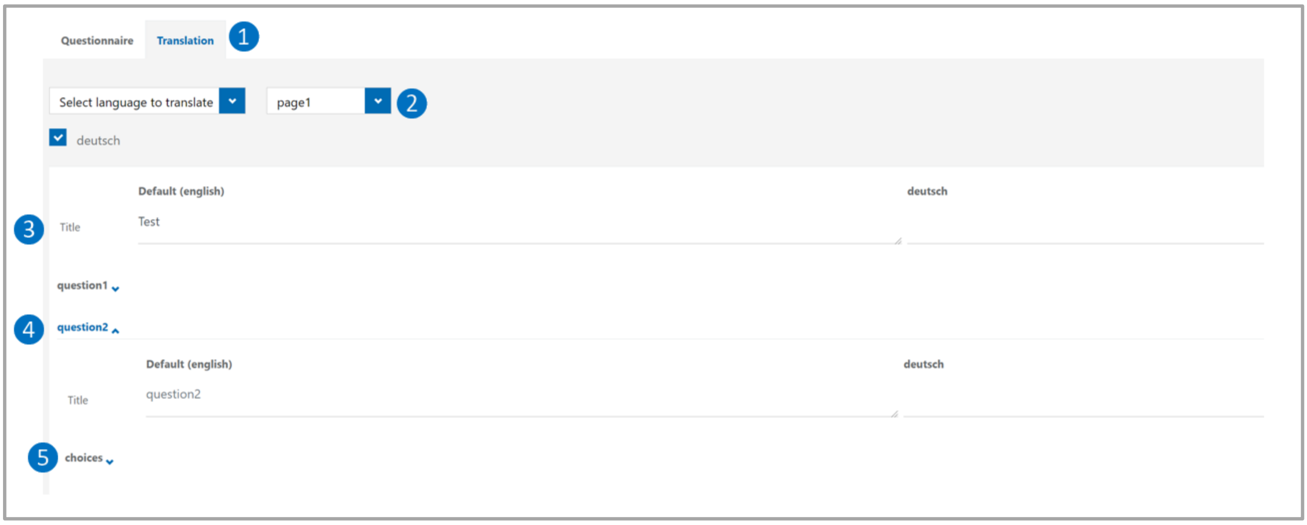


Figure 34 - Translation of Questionnaire

Select the page on which you want to translate the questions ❶. And add the language you want the questions translated into ❷. You can choose from the 12 Basic SupplyOn languages.

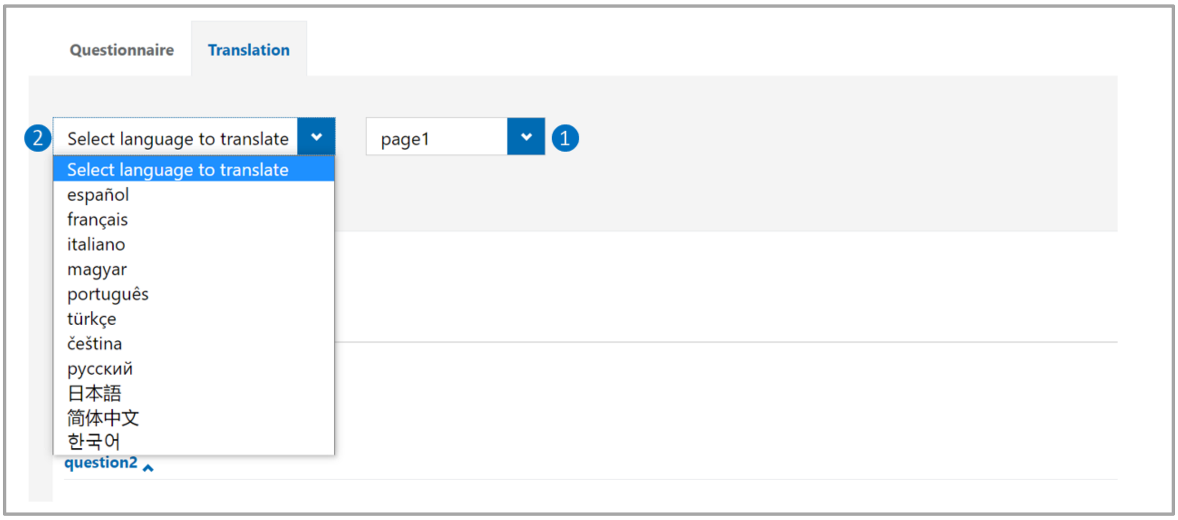


Figure 35 - Selection of languages for translation

The selected languages are displayed in the upper bar and can be deselected by clicking on the checkbox ❶. The languages into which the questionnaire is to be translated appear in the columns next to the individual questions ❷. The translations must be entered manually ❸.

BD-Fields are automatically translated and shown in the recipient`s language so you just need to translate your questionnaire if you have added non-BD-Fields that you want to have answered.

Finish the translation with "Cancel" (entries are not saved), "Save as Draft" (entries are saved as draft), "Save and Close (entries are saved and are active) ❹.

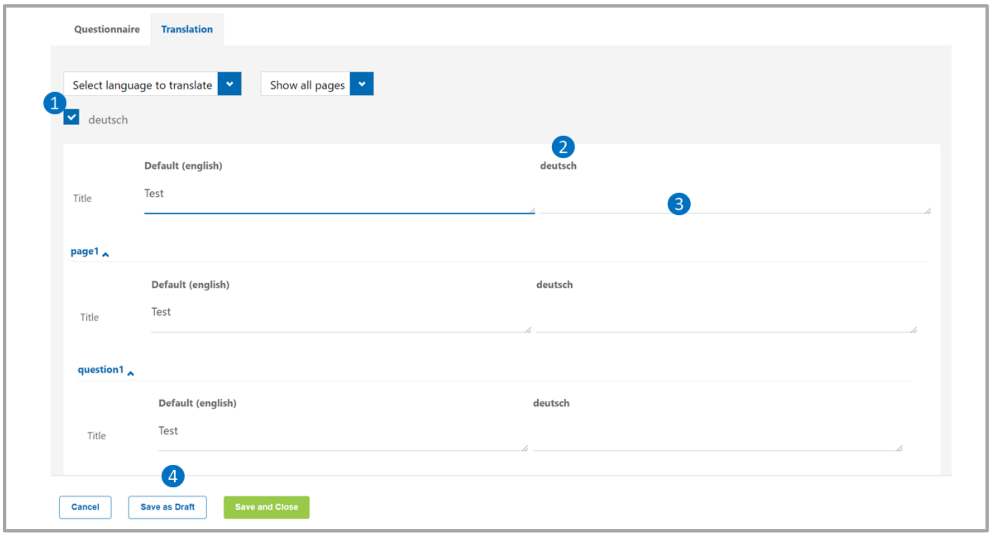


Figure 36 - Entering the translation

If you want to change the default language go back to the tab “Questionnaire❶ and open “Set Title” ❷. Select the desired language as default ❸.

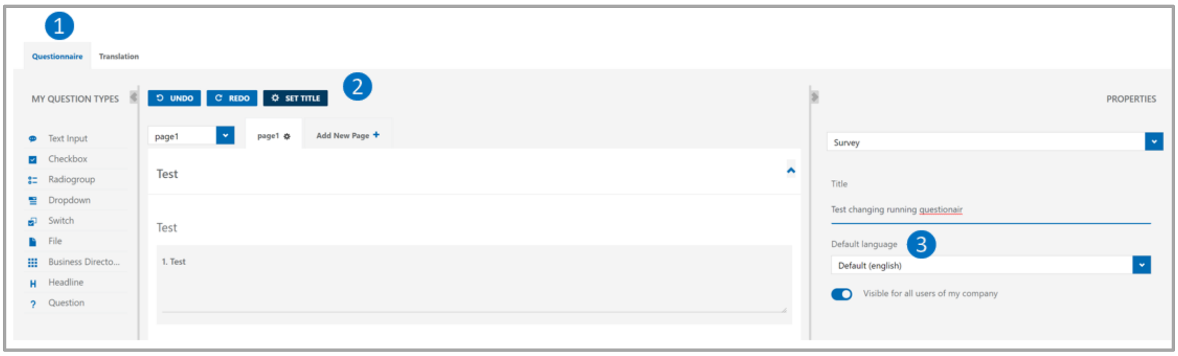
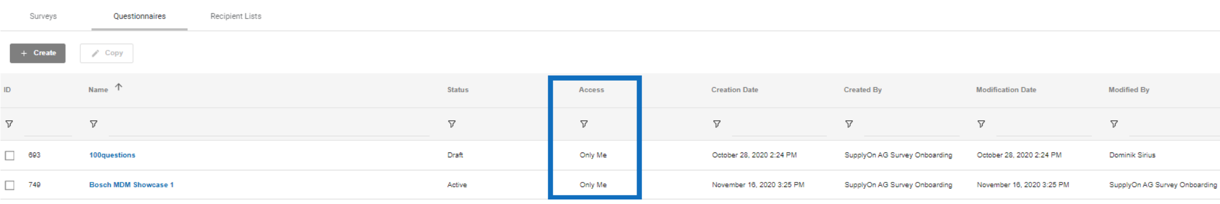


Figure 37 - Change default language

1.2.4.1.11 Collaboration and Visibility of Questionnaire

Due to the SupplyOn collaboration concept, it is possible to enable questionnaires that are created by one user to be visible to the colleagues of the same company.

In the questionnaire overview you can see the details here:



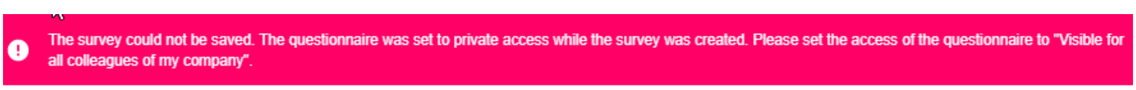
ID	Name	Status	Access	Creation Date	Created By	Modification Date	Modified By
693	100questions	Draft	Only Me	October 28, 2020 2:24 PM	SupplyOn AG Survey Onboarding	October 28, 2020 2:24 PM	Dominik Sirius
749	Bosch MDM Showcase 1	Active	Only Me	November 16, 2020 3:25 PM	SupplyOn AG Survey Onboarding	November 16, 2020 3:25 PM	SupplyOn AG Survey Onboarding

Figure 38 - Overview Collaboration and Visibility of Questionnaire

To enable this, click on "Set Title" ❶. Now you will see the questionnaire settings. Then you can enable/disable the visibility by clicking on "Visible for all users of my company" ❷ (blue color = activated, gray color = not activated).

Please note:

- The default value is always “ON”. The questionnaire therefore is always visible for all company users by default
- Questionnaire and Survey always should have the same settings when they only should be visible for the creator:
  - Questionnaire (not visible for others) + Survey (visible for others)
    - ➔ Error Message:



    - ➔ Either change the survey to “not visible” or edit the questionnaire again in order that both have the same status
  - Questionnaire (visible for others) + Survey (not visible for others)
    - ➔ No issues, this use case is possible
- Access type can be changed for Questionnaires:
  - not used in any Surveys
  - used in user’s own Surveys with access type 'Only Me'

- Also see [Recommendations for survey design]

Figure 39 - Collaboration and Visibility of Questionnaire

1.2.4.1.12 Save as Draft / Save and Close the Questionnaire

When you have finished editing or creating the questionnaire, you will find the buttons "Cancel" ❶ (changes are not saved), "Save as Draft" ❷ (questionnaire is saved as a “Draft”) and "Save and Close" ❸ (questionnaire is saved and “Active”) at the bottom of the page.

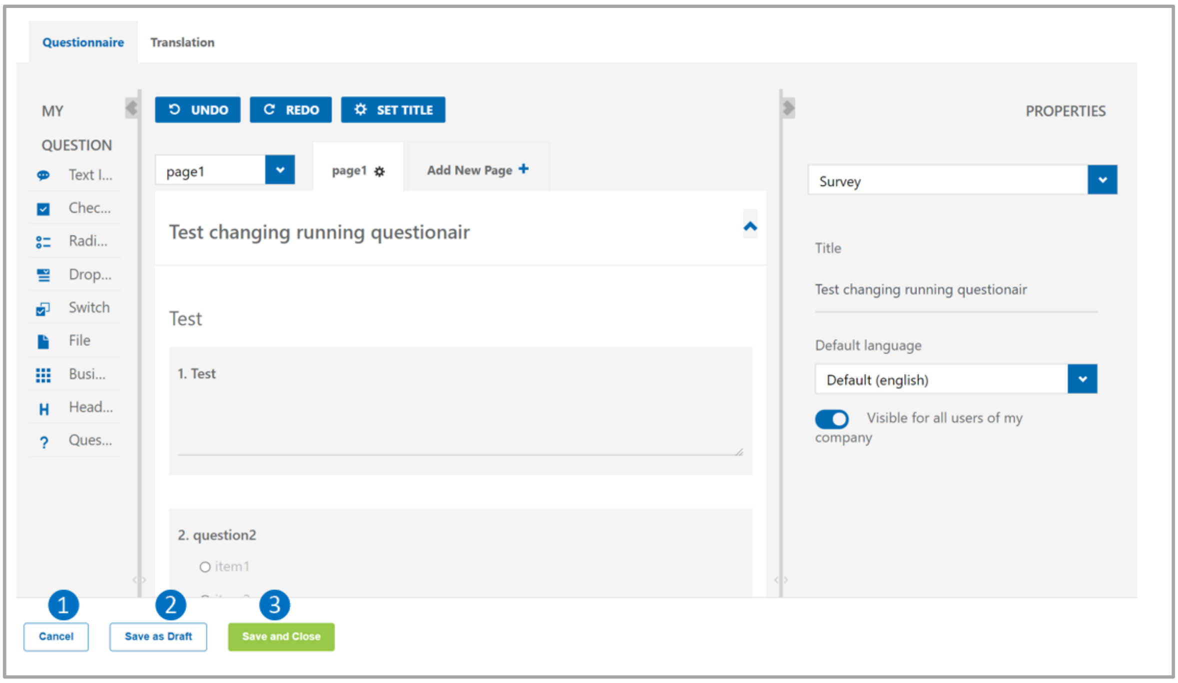


Figure 40 - Save as Draft / Save and Close the Questionnaire

In the questionnaire list ❶ the questionnaires will be shown as “Draft” ❷ and “Active” ❸.
If you use the questionnaire for the survey, it makes no difference what status the questionnaire is in. This display or function is more or less a reminder for the user that the questionnaire has been completed or still needs to be edited.

Changes can be made in the questionnaire in both states (Draft/Active). As soon as a questionnaire is added to a survey, the changes made afterwards in the questionnaire are not applied to the survey. Only when the questionnaire is deleted in the survey and added again, the changed questionnaire appears (this is only possible as long as the survey has not been started).

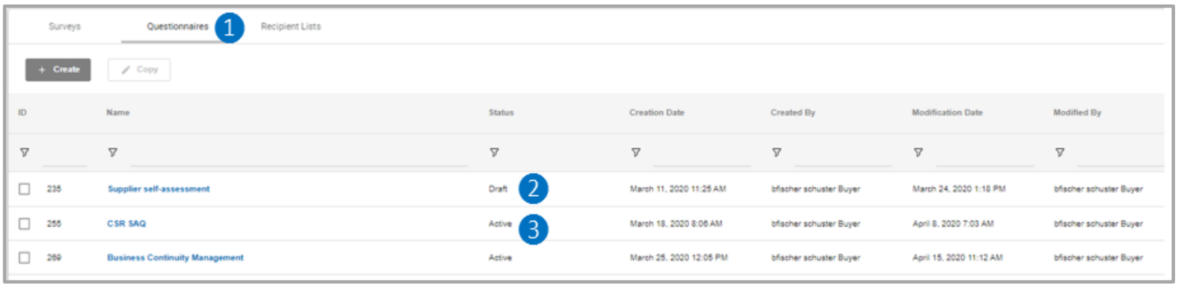


Figure 41 - Display in Questionnaire list "Draft" and "Active"

1.2.5 Survey

The survey contains all basic data such as the title of the survey, description, start and end date, duration, welcome and confirmation page, as well as the questionnaire and recipient list.

1.2.5.1 Create a survey

In order to create a survey ❶ either use the “Creator” in the left sidebar ❷ or click on the + Create button ❸.

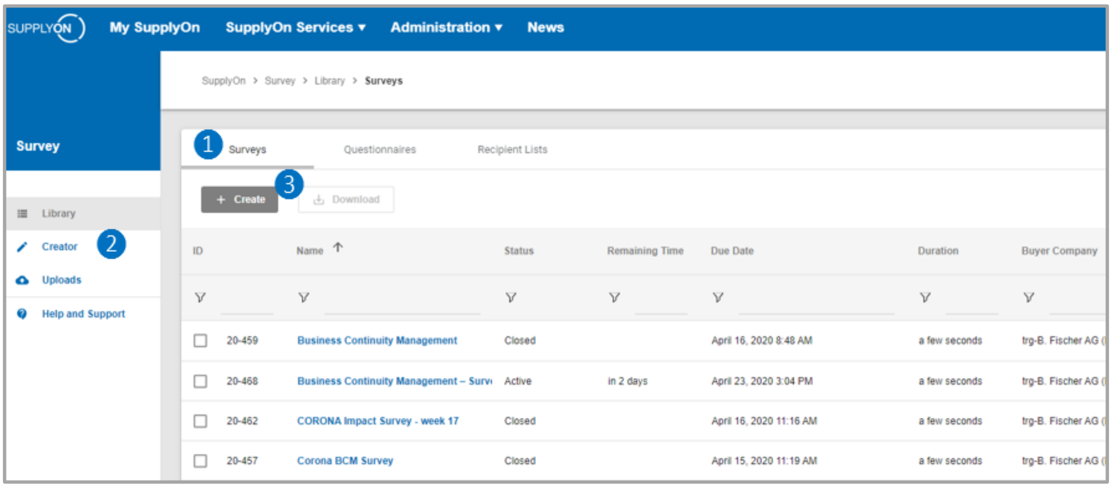


Figure 42 - Create a survey

Both options will lead you to the same survey creating and editing page ❶.

The progress of the survey is displayed in the sidebar ❷. You will also be forwarded to the different positions of the survey if you click on the headlines ❸.
Enter the survey information in the different fields. The fields highlighted in red are mandatory fields ❹.
The grey fields are optional ❺. A question mark symbol is displayed next to each field ❻. By clicking on it, you will see the information about this field in the right sidebar ❼.

The survey duration is always prefilled automatically (default) with a duration of “a few minutes”. This can be changed by clicking on another duration from the dropdown list ❽ The survey can later be extended (when the survey still is running). Therefore, then you have to reopen the survey, click on edit and adapt the Due Time.

In order to set a survey, start and end date, click into the respective line and select a date/time from the date/time – picker ❾.

The Survey Creator can be closed at any time ❿: "Back to Library" (the data is not saved), "Save as Draft" (the data is saved as a draft), "Save and Send" (the survey is started and saved).

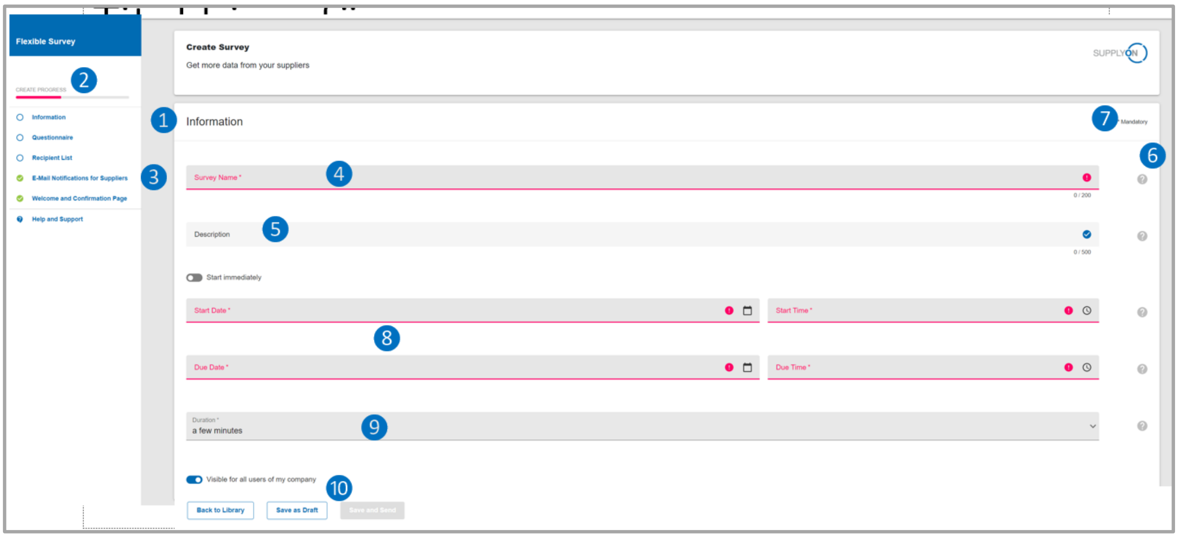


Figure 43 - Fill in the survey information

1.2.5.1.1 Collaboration and Visibility of Survey

Due to the SupplyOn collaboration concept, it is possible to enable surveys that are created by one user to be visible to the colleagues of the same company.

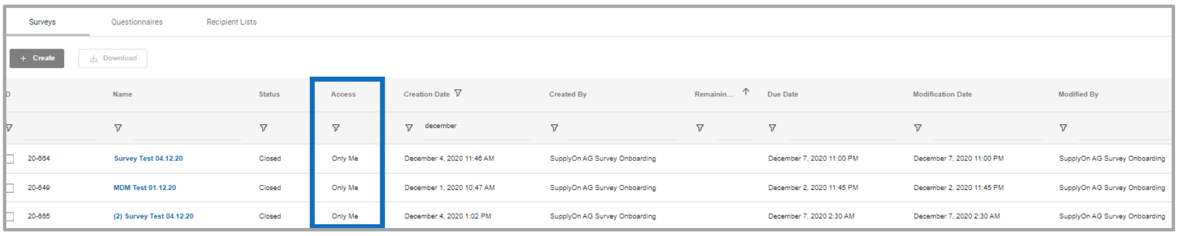


Figure 44 - Overview Collaboration and Visibility of Survey

To activate this, you need to press the slider “Visible for all users of my company” that is in the survey creator (blue color = activated, gray color = not activated).

Please note:

- The default value is always “ON”. The survey therefore is always visible for all company users by default
- Questionnaire and Survey always should have the same settings when they only should be visible for the creator:
  - Questionnaire (not visible for others) + Survey (visible for others)
    - ➔ Questionnaire cannot be found in the questionnaire selection when you create the survey
    - ➔ Either change the survey to “not visible” or edit the questionnaire again in order that both have the same status

  - Questionnaire (visible for others) + Survey (not visible for others)
    - ➔ No issues, this use case is possible

  - Also see Recommendations for survey design

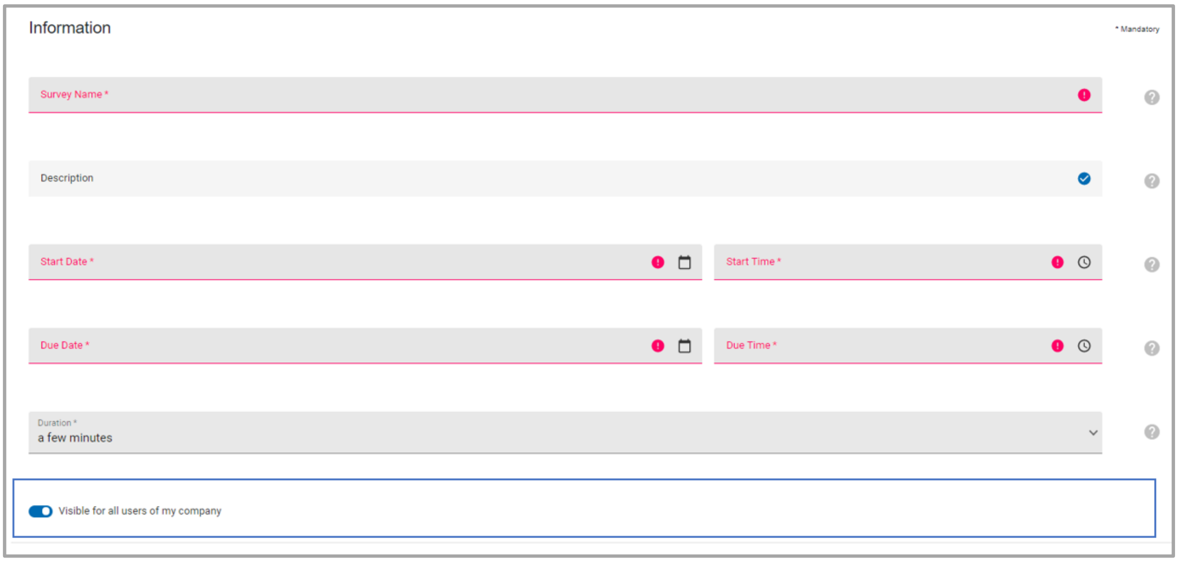


Figure 45 - Collaboration and Visibility of Survey

1.2.5.1.2 Survey Reminder

Here you can specify settings for Email Reminder: The Survey Recipient will always be notified if he has not yet opened the survey.
Click on "Add notification" ❶ to add a reminder. You can then select a date on which the reminder should be sent from the date picker ❷. Click on the trash can to delete the reminder ❸.
It is possible to set a total of 5 reminders.

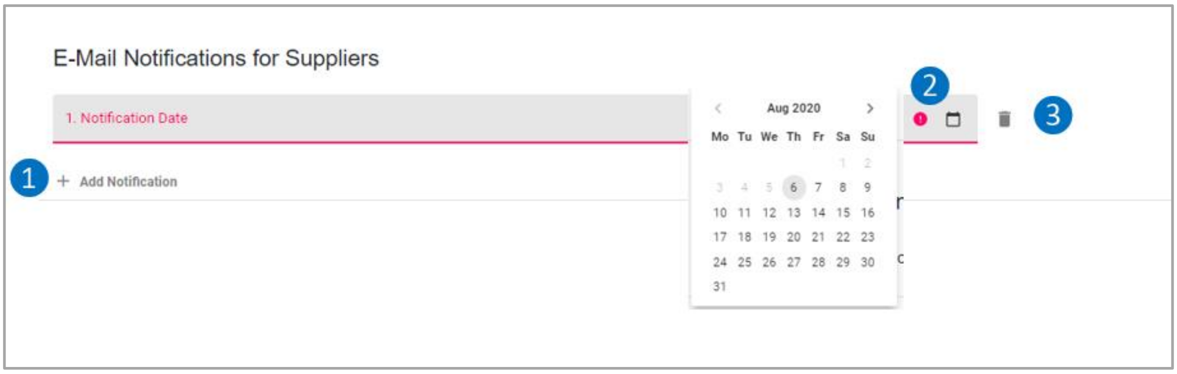


Figure 46 - Email Reminder Settings

1.2.5.1.3 Welcome and Confirmation Page Settings of a survey

A standard text that is not editable is already predefined ❶. This text is translated into the respective language of the survey participant (if the recipient is connected and has stored his language in the user profile). Otherwise this text will be displayed in English.

Underneath it there is a text field in which you can insert your personalized text. This text will NOT be translated and this text can NOT be formatted. This text is displayed as plain text ❷. We recommend to add your text in an English and/or include it in another language right after the first text. 1500 characters are the maximum for this text.

You can add an attachment after you have saved the survey as draft and reopened it by clicking on “Browse”. After selecting your desired attachment click on “Upload” to save the attachment. This is only possible after the survey has been saved as a draft ❸. The question marks next to the fields, show help information in the sidebar on the right ❹.

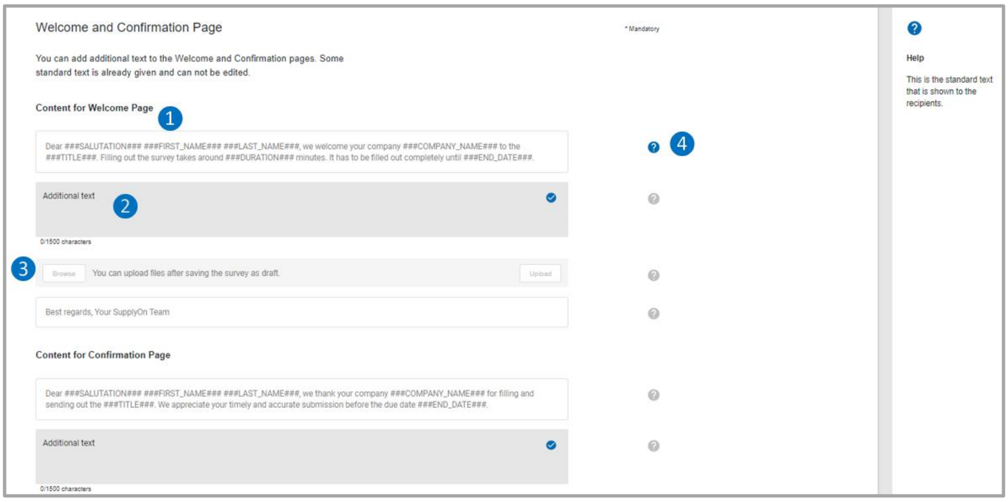


Figure 47 - Survey Welcome /Confirmation Page

1.2.5.1.4 Add Questionnaire / Recipient list to survey

Scroll down further to add the questionnaire and the recipient list to the survey. They can be added by pressing the "Select Questionnaire" / "Add recipient list" button ❶. They can be deleted again by pressing the "Remove" button ❷ but it is necessary to add the questionnaire and at least one recipient list as the field is mandatory ❸. The selected questionnaire / recipient list(s) will be displayed in the list ❹.

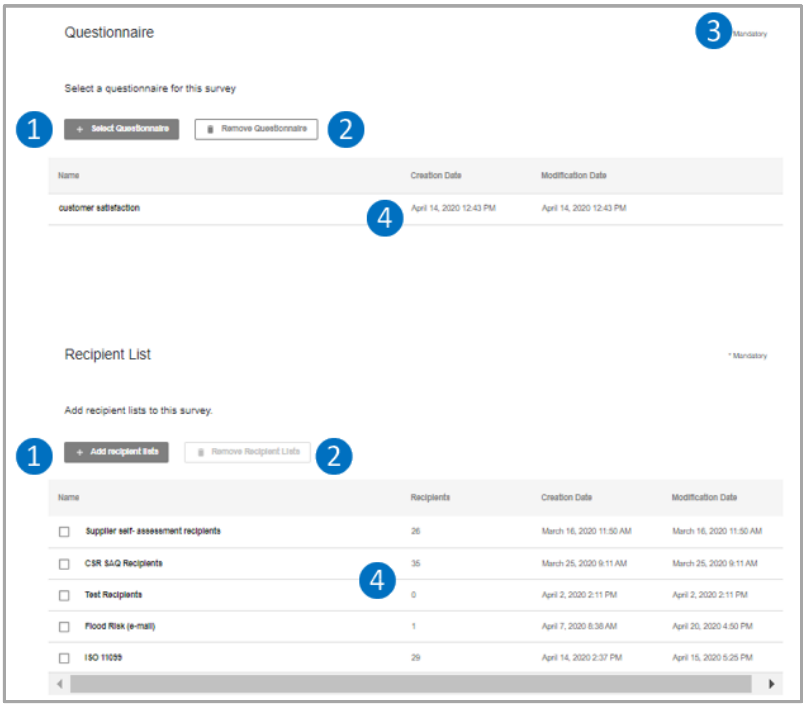


Figure 48 - Add / remove Questionnaire and Recipient List

To add a Questionnaire or Recipient List you can either create a new one ❶ or choose an already created one from the list. The questionnaires / recipient lists can be filtered by certain details ❷. Choose your questionnaire or recipient list(s) ❸ (only one questionnaire but more recipient lists are possible, recipients are just addressed once as the application filters out double entries from multiple recipient lists) and click on “Confirm” to save the changes ❹. The selected questionnaire / recipient list is now added to the survey.

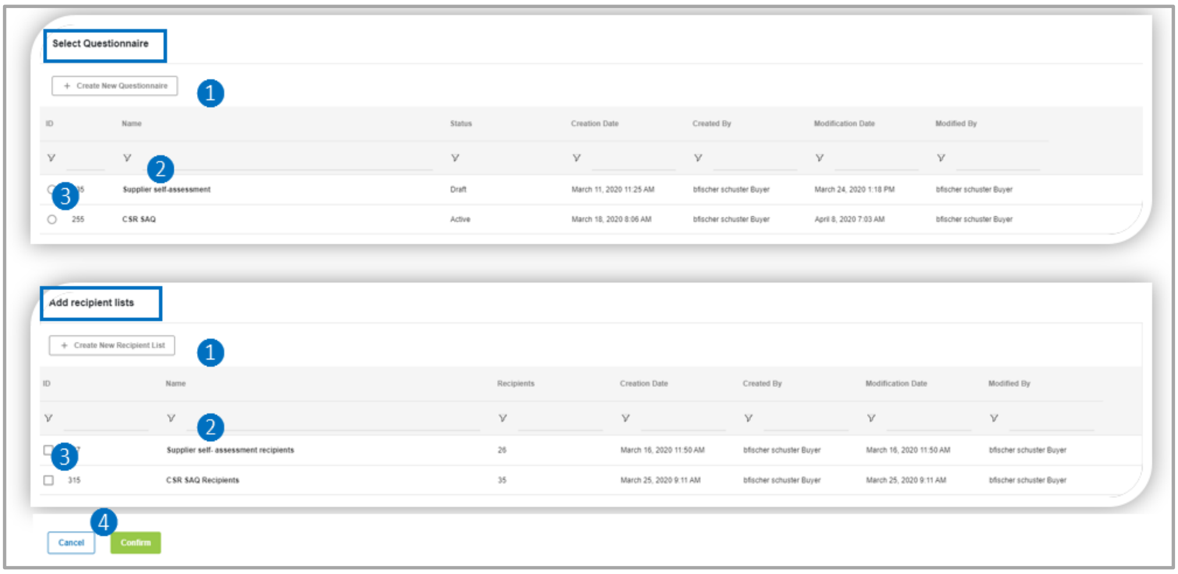


Figure 49 - Add Questionnaire / Recipient List to Survey

If the questionnaire contains BD fields, a message appears stating that not all survey recipients may get the question displayed if they only have the "SurveyRecipient" role and not the "BusinessDirectorySellerStandard" role or "CompanyAdmin" role.

1.2.5.2 Send the Survey

As soon as you have filled out the survey, added the Recipient list and the Questionnaire and, if necessary, added an attachment, you can send the survey with the button "Save and Send". The email notification will be immediately processed and sent in batches over some time (7000 per 1h) to ensure that the system performance is not impacted.

Recipients can then either complete the survey themselves, or forward the survey to a colleague by opening the survey and pressing the "Forward to Colleague" button. They can also refuse to participate by pressing the "Decline" button.

The survey creator will be able to see these details later in the report.

1.2.5.3 Add Recipient List to Active Survey

If the survey has already started, but is currently still running, it is possible to invite an additional recipient list to the survey (e.g. if a recipient has been forgotten).

To do this, you first have to create the corresponding recipient list to be invited. See chapter "create recipient list".

Then click on the active survey to which you want to invite the additional recipient list.
Click on "Edit Survey" ❶, select "Add Recipient List" ❷ and choose the appropriate list ❸.
Confirm your selection with "Confirm" ❹ and finally click on "Update Survey" ❺.

In the background, the system checks whether the recipient(s) in the further recipient list(s) was (were) already invited when the survey was first sent. If this is the case, the recipient will not be invited again.

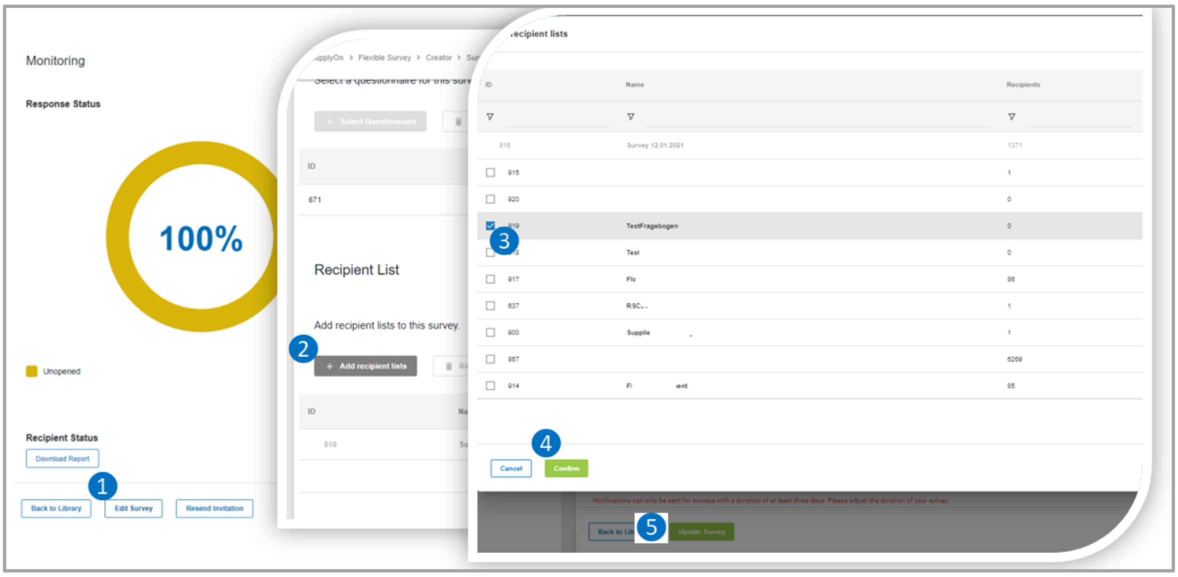


Figure 50 - Add Recipient List to Active Survey

1.2.6 Survey Reports

The survey creator can create a report of the survey during or after completion of the survey.

This report contains information about the delivery status and whether the survey was forwarded to a colleague as well as the answers to the questions asked in the questionnaire.

1.2.6.1 Monitoring

To get to the monitoring open the survey library ❶ and click on the survey (name) you want to evaluate or want to have more information ❷.

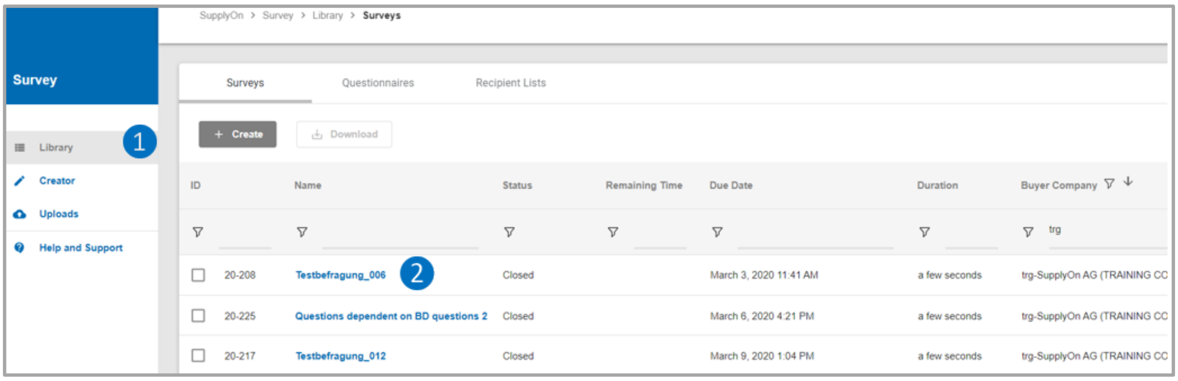


Figure 51 - Open Survey Monitoring

The Monitoring shows two charts: On the left, the Response Status ❶ is displayed and on the right the Invitation E-Mail Delivery Status ❷.

Response Status: The diagram distinguishes between:

- Declined
- Forwarded
- Opened
- Submitted
- Unopened

By clicking on the respective part of the diagram, the corresponding percentage is displayed. Below the pie chart, the percentages are again expressed in numerical numbers, the exact number of respective evaluation possibility can be traced ❸.

Invitation E-Mail Delivery Status: The diagram distinguishes between:

- Delivered
- Undelivered

By clicking on the respective part of the diagram, the corresponding percentage is displayed. Below the pie chart, the percentages are again expressed in numerical numbers, the exact number of delivered and undelivered e-mails can be traced ❸.

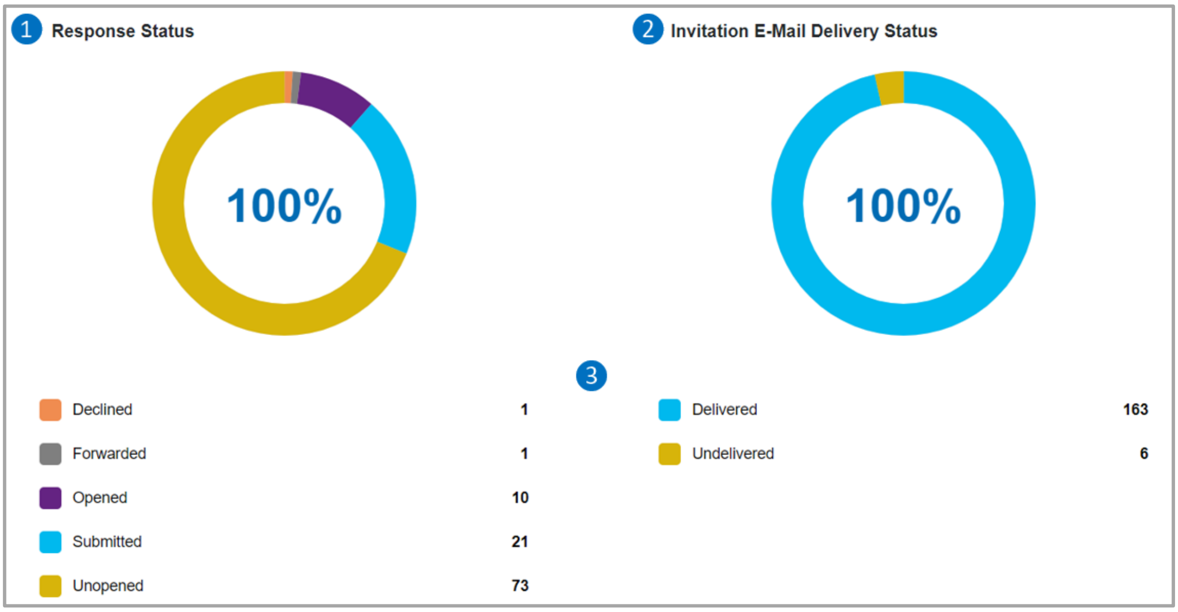


Figure 52 - Description Survey Monitoring

1.2.6.2 Survey Report

To get a more detailed evaluation of the survey it is necessary to download the report. There are two possibilities:

Firstly, you can download the "Recipient Status" below the Monitoring directly with the Download button ❶.

Secondly, you can select one survey in the Survey Library with the checkbox ❷ and download the report with the Download button ❸.

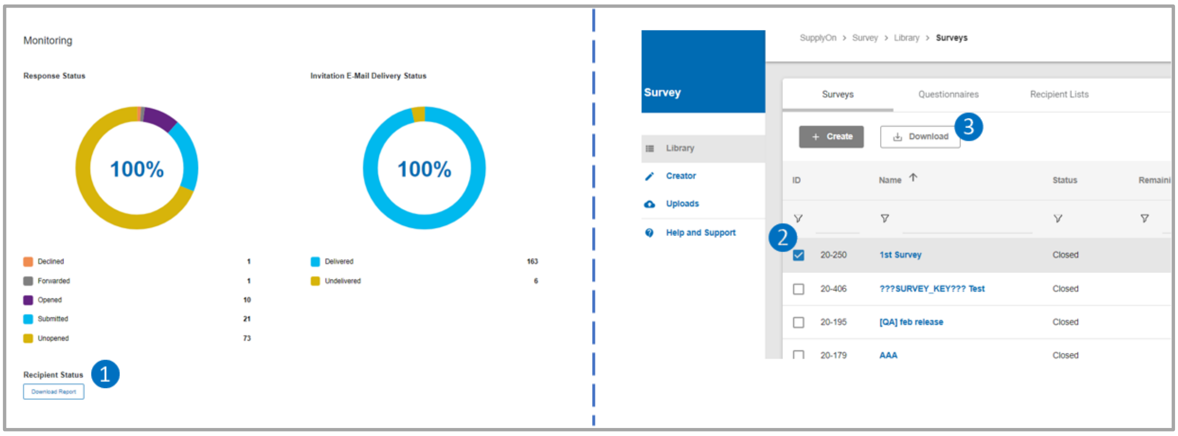


Figure 53 - Download Survey Report

Download Format:

Providing the download in xlsx format has impact on the service performance and could cause the report to run in a timeout.
Therefore xls-format was chosen on purpose, knowing the benefits and disadvantages of the format.

Open the document that was downloaded. It contains the following tabs:

- **Survey Overview**
- **Company Status**
- **Forwarded Invitations**
- **Answers**

Remind:

The survey report is created at user level, not at supplier level as the whole application is based on a userbased addressing approach. It may be the case that supplier companies are listed several times and you find the overall status in the tab "company status".

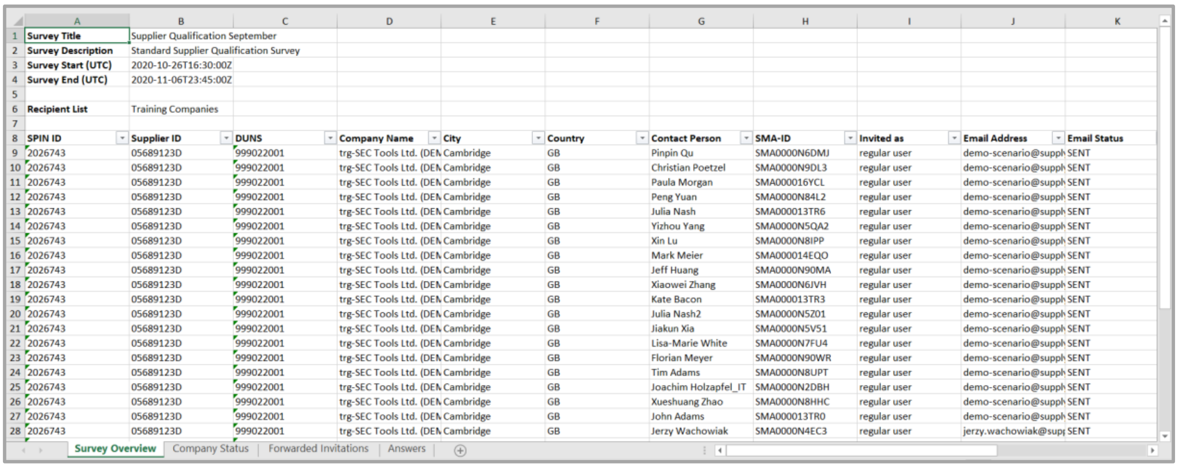
1.2.6.2.1 Survey Overview

The survey overview lists the survey recipients with the following recipient details:

SPINID, DUNS-number, company name, connect type, city, country, contact person, SMAID, e-mail address, e-mail date, response status, response date, and decline reason.

This overview helps to identify delivery problems or to see which supplier user has not answered, opened or even has declined the survey (important: the report is based in supplier user level not on supplier level).

You can also identify, how the supplier was invited (see column "Invited as"), Either as a regular user or a token user (see chapter 1.2.3.2 Upload a recipient list)



	A	B	C	D	E	F	G	H	I	J	K
1	**Survey Title**	Supplier Qualification September									
2	**Survey Description**	Standard Supplier Qualification Survey									
3	**Survey Start (UTC)**	2020-10-26T16:30:00Z									
4	**Survey End (UTC)**	2020-11-06T23:45:00Z									
5											
6	**Recipient List**	Training Companies									
7											
8	**SPIN ID**	**Supplier ID**	**DUNS**	**Company Name**	**City**	**Country**	**Contact Person**	**SMA-ID**	**Invited as**	**Email Address**	**Email Status**
9	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Pinpin Qu	SMA0000N6DMJ	regular user	demo-scenario@suppl	SENT
10	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Christian Poetzel	SMA0000N9DL3	regular user	demo-scenario@suppl	SENT
11	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Paula Morgan	SMA000016YCL	regular user	demo-scenario@suppl	SENT
12	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Peng Yuan	SMA0000N84L2	regular user	demo-scenario@suppl	SENT
13	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Julia Nash	SMA000013TR6	regular user	demo-scenario@suppl	SENT
14	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Yizhou Yang	SMA0000N5QA2	regular user	demo-scenario@suppl	SENT
15	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Xin Lu	SMA0000N8IPP	regular user	demo-scenario@suppl	SENT
16	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Mark Meier	SMA000014EQO	regular user	demo-scenario@suppl	SENT
17	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Jeff Huang	SMA0000N90MA	regular user	demo-scenario@suppl	SENT
18	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Xiaowei Zhang	SMA0000N6JVH	regular user	demo-scenario@suppl	SENT
19	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Kate Bacon	SMA000013TR3	regular user	demo-scenario@suppl	SENT
20	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Julia Nash2	SMA0000N5Z01	regular user	demo-scenario@suppl	SENT
21	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Jiakun Xia	SMA0000N5V51	regular user	demo-scenario@suppl	SENT
22	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Lisa-Marie White	SMA0000N7FU4	regular user	demo-scenario@suppl	SENT
23	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Florian Meyer	SMA0000N90WR	regular user	demo-scenario@suppl	SENT
24	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Tim Adams	SMA0000N8UPT	regular user	demo-scenario@suppl	SENT
25	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Joachim Holzapfel_IT	SMA0000N2DBH	regular user	demo-scenario@suppl	SENT
26	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Xueshuang Zhao	SMA0000N8HHC	regular user	demo-scenario@suppl	SENT
27	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	John Adams	SMA000013TR0	regular user	demo-scenario@suppl	SENT
28	2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	Jerzy Wachowiak	SMA0000N4EC3	regular user	jerzy.wachowiak@supp	SENT

Survey Overview | Company Status | Forwarded Invitations | Answers

Figure 54 - Survey Overview Report

Remind:

1. For unregistered recipient entries where the recipient has not yet registered, the ResponseStatus is UNOPENED and the ResponseDate is empty (after they registered, the status still will be UNOPENED with an empty ResponseDate as long as they perform any OPENED, DECLINED, FORWARD or SUBMITTED action on the response, just like any other recipients).

2. The EmailDate is empty for entries with EmailStatus = SCHEDULED (sending out the E-Mail Is planned but has not happened yet)

3. The ResponseDate is empty for entries with ResponseStatus=UNOPENED (replies have been created by system, but user has not yet done anything with the survey)

4. If the E-Mail Status is “undelivered”, “delivery” bounced” or “blocked” one might think that the “Response- Status” only can be “NOT_ANSWERED”. But it is possible that it is “SUBMITTED” (the connected supplier user did not open the survey from the E-Mail Link. The supplier opened and answered the Survey directly in the Flexible Survey on the SupplyOn platform).

5. How to set E-Mail reminder for a survey that has not been accessed until then (if not opened / submitted / decline / forwarded).

Meaning of different E-Mail Delivery Status:

E-Mail Status	Explanation
SCHEDULED:	In this case the E-Mail is not yet handed over to MailJet.
BOUNCE**:**	There is a soft/hard distinction. The delivery from the mail provider was attempted, but the system received negative feedback, e.g. mailbox of the supplier is full or mail address no longer available/reachable.
BLOCKER	In this case the mail provider does not even try an attempt, because e.g. it is a suspicious email address or the address does not even exist (typo?).
DELIVERY	The E-Mail is handed over to MailJet. Meaning the email delivery attempt is still "in progress".
SENT	In this case the e-mail was successfully delivered by the e-mail provider to the target mailserver/mailbox. This does not mean that the E-Mail was delivered to the recipient´s inbox, e.g. it could happen, that the e-mail was caught by a spam-filter on the target mailserver.

Table 5 - Meaning of different E-Mail Delivery Status

1.2.6.2.2 Company Status

The company status shows an aggregated best status of all companies that were invited to a survey. The entry of the last employee will count. This means that if several employees of a company answer a survey on behalf of their company, the last entry is recorded here (answers to the questionnaire). Best status means that the company will have the status submitted when one employee answered the survey but the others declined or did not respond.

The answers of each individual users can be viewed in the tab "Answers".

A	B	C	D	E	F	G	H	I	J	K	L	M
SPIN ID	Supplier ID	DUNS	Company Name	City	Country	Response Status	Response Time	Decline Reasc	DUNS Numbe	Company nai	Street, Nr	ZIP Code
2026743	05689123D	999022001	trg-SEC Tools Ltd. (DEN	Cambridge	GB	SUBMITTED	2020-10-27T08:54:01Z			trg-SEC Tools	Orchard Road	CF24
2026747		999022003	trg-Saller SA (DEMO CC	Waiblingen	DE	FORWARDED	2020-10-28T08:01:43Z					

Survey Overview | Company Status | Forwarded Invitations | Answers

1.2.6.2.3 Forwarded Invitations

Open the tab “Forwarded Invitations” ❶ to see which recipient forwarded the participation to the survey.

You can see to which company the person forwarding the survey belongs ❷.

You can also clearly identify the person who forwarded the survey by looking at the “ContactPerson”, “SMAID”, "EmailAddress" and "Forwarded from" columns ❸.

You can see in column H to K whether the forwarding worked ("EmailStatus", “EmailDate”, “ResponseStatus”, “ResponseDate”) ❹

<u>Possible “EmailStatus”:</u>

SENT, DELIVERY, BLOCKER, BOUNCE, SCHEDULED (see table 4).

<u>Possible “ResponseStatus”:</u>

FORWARDED, UNOPENED, SUBMITTED, DECLINED

The supplier can forward the survey either to registered users (Column L) or to email recipients (Column M) which is visible here. Registered user can forward the survey just to registered user from their company with the minimum role set of BDSupplierStandard and GeneralSurveyRecipient. Unregistered companies can just forward the to another E-Mail address that has to register himself on Supply On free of charge.

A	B	C	D	E	F	G	H	I	J	K	L	M
SPINID	DUNS	CompanyName	ContactPerson	SMAID	EmailAddress	Forwarded from	EmailStatus	EmailDate	ResponseStatus	ResponseDate	Forwarded to User	Forwarded to Email
124324	XXXXXX	Test Company	Test1	SMA000	test@testmail.com	SMA0003456789(	SENT	2020-05-04T07:	UNOPENED			
45	XXXXXX	Test Company	Test2	SMA001	test@testmail.com		SENT	2020-05-04T07:	FORWARDED		SMA00034567890	
234	XXXXXX	Test Company	Test3	SMA002	test@testmail.com		SENT	2020-05-04T07:	UNOPENED			
5365	XXXXXX	Test Company	Test4	SMA003	test@testmail.com	SMA0003456789(	SENT	2020-05-04T07:	FORWARDED		SMA00034567890	
46587	XXXXXX	Test Company	Test5	SMA004	test@testmail.com		SENT	2020-05-04T07:	UNOPENED			

Survey Overview | Forwarded Invitations | Answers

Figure 55 - Forwarded Invitations

1.2.6.2.4 Answers

The third tab shows the “Answers” of the survey ❶.

Company Data + Survey Respondent Data ❷: Columns A to I show the company data and the data of the person completing the survey.

Answers to the questions of the survey: From column K on, the answers to the survey are displayed.

Answers to questions with predefined answers:

- In column K you can see the answers for a question that has predefined answer options (Radiogroup-, Dropdown-, Checkbox-Question). The answer that is given is always displayed twice but separated by a colon ❸.
- In column L and M, the response to a free text field is shown as an example (Single Text Field and Comment Field) ❹.
- In column N a link is displayed, which is generated when a "File" question is answered ❺. If the survey participant has uploaded an attachment in the question field, a link is displayed here. If you want to see the content, copy the link and paste it into the URL bar of any browser and press ENTER. It is not possible to do a “mass-download”.

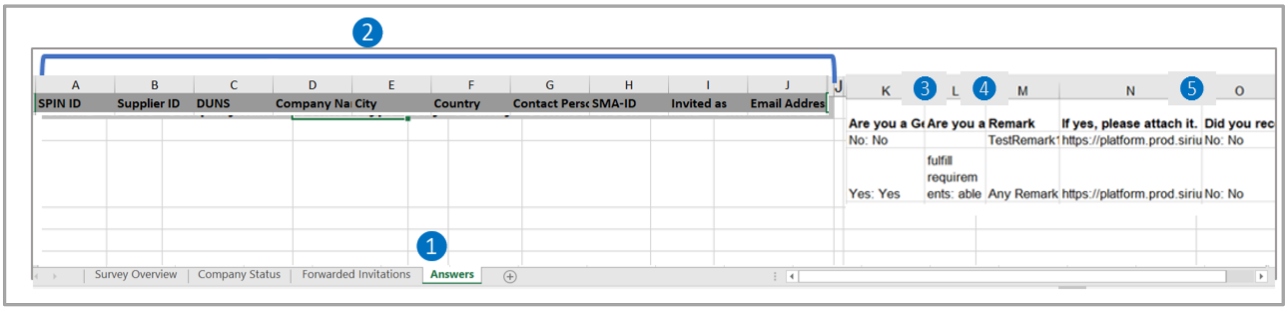


Figure 56 – Answers

1.2.7 Resend Survey Invitation

It is possible to resend a survey (during its runtime), because e.g. a supplier accidentally refused to participate. This is only possible if the supplier is in the recipient list of the survey. If not, then see the instructions at "Add Recipient List to Active Survey") to add the recipient and if the survey is currently still running. This functionality also can be used to reopen the survey for Suppliers who declined the participation and need to reopen the survey. Furthermore, supplier who have lost their invitation links (e.g. unregistered recipients) can be provided with the invitation e-mail again.

First go to the Survey Report to find out to which email address the survey invitation was sent. Then select the person/company and save the corresponding email address.

Then click on the respective survey and then on "Resend Invitation" ❶. A window will open where you can paste the copied email address ❷. Check the pasted email address ❸. If it was successfully, you finally can click on “Resend Invitation” ❹. If the email address is not approved this email address was not invited the first time.

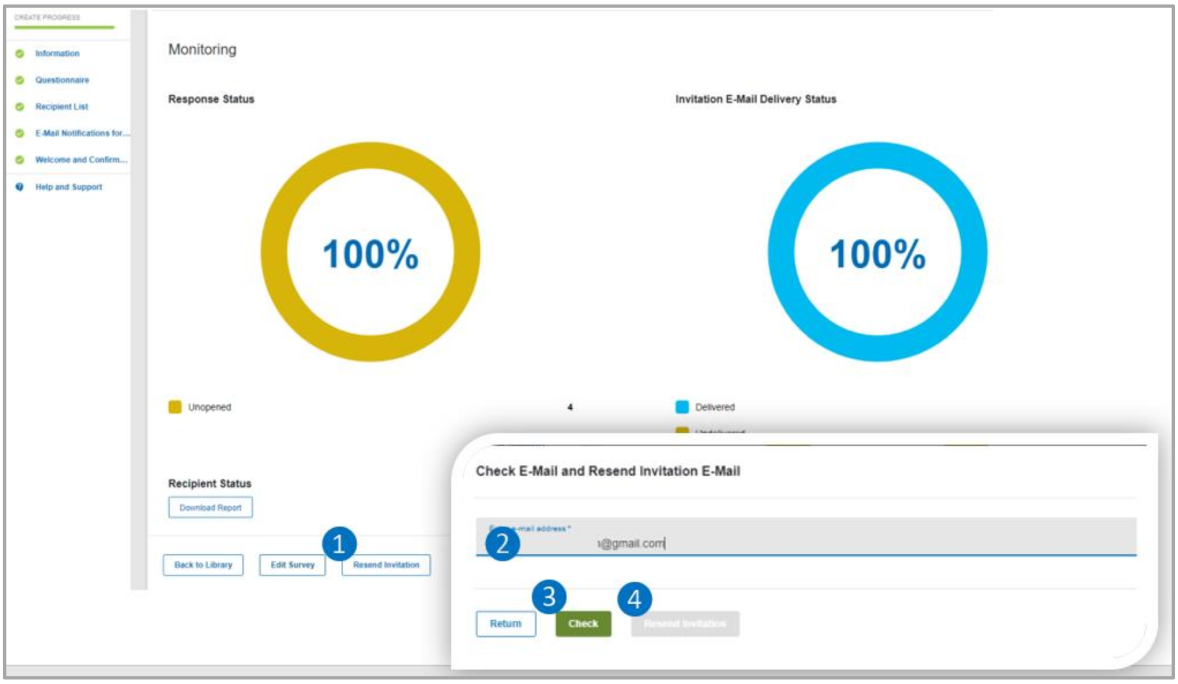


Figure 57 - Resend Survey Invitation

1.2.8 Reminder

Here you can specify settings for Email Reminder: The Survey Recipient will always be notified if he has not yet opened the survey.
Click on "Add notification" ❶ to add a reminder. You can then select a date on which the reminder should be sent from the date picker ❷. Click on the trash can to delete the reminder ❸.
It is possible to set a total of 10 reminders.

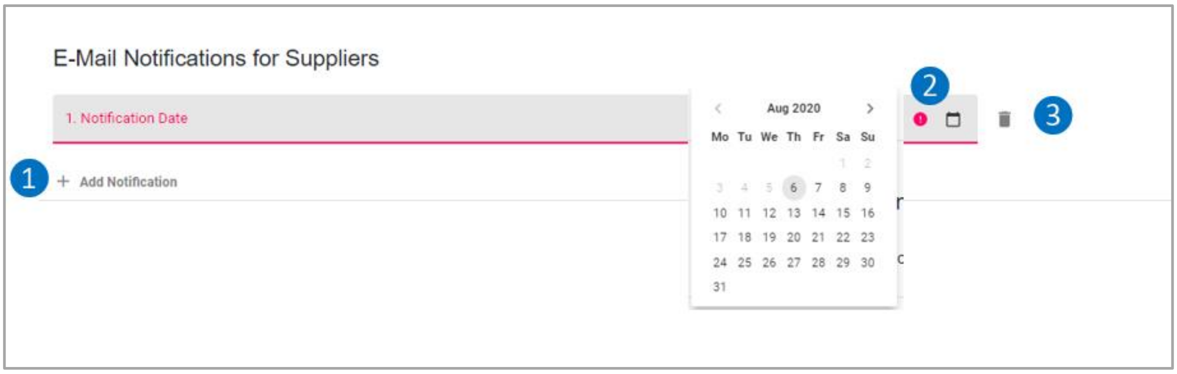


Figure 58 - Email Reminder

1.2.9 Recommendations for survey design

Of course, you can just go ahead and ask all the questions you want somehow. And of course, you will also get your answers.

But with regard to the evaluation of the questionnaire it is important to pay attention to a few things in order to be able to work effectively with the gained information later on.

Basically, it must be clarified what purpose the survey is to serve and what expectations are placed on the results of the survey. It is important to define which current questions are to be answered by the survey and whether either qualitative or quantitative high-quality data is to be generated.

Survey

- In order to achieve good survey response results, it is recommended to inform your suppliers beforehand about the planned survey, the background and importance of your request. Be short, but specific in your wording and inform the user group you will address in your survey.
- The supplier pre-communication should be distributed shortly before start of the survey, in order to avoid questions about timeline and access.

Recipient List

- The recipient list can be used to compare certain groups. Create different recipient lists, e.g. based on the characteristics of company location, company size, products, etc.

- Distinguish whether it is important that the survey is simply answered by someone, or whether only an expert from the company can best fill out the questions. Therefore, select explicit persons of the company (see point 1.2.3.1.1 Select connected recipients).

- Try to avoid to contact suppliers via email access – start the rollout for Business Directory as first phase of your survey project.

Questionnaire

- With regard to the questioning it is important to consider what exactly is to be found out. Although it is often very informative to obtain as much information as possible via a free text field, these answers cannot be compared later or only with a lot of effort. For many survey participants this can be very time-consuming.
  Therefore, when creating a questionnaire, think about whether it is possible to bundle potential answers with general terms and specify them as possible answers.

- Always label your questions with **Question-ID** and **Question-Title**. This is the only way you can match the answers to the questions in the evaluation.
  In addition, the labeling helps you to find the question more easily in case of conditions and to be able to understand this condition later on.

- Ask short questions and divide longer questions into two questions.

- Divide your questionnaire into pages and label the pages to make the questionnaire clearer.

- The use of the **collaboration concept** makes sense when:

  - the questionnaire is very basic or it is a standard process (so other colleagues can use it). Time can be saved in this way

- several employees are working on the same project and want to see the results of the survey
- to provide full transparency and access to the data in case of substitution (e.g. illness, employee change, maternity leave).

- If you identify this **network error** during survey creation and are afraid of losing all the data that you inserted copy the URL and insert it in another tab. Afterwards, click on save.

Figure 59 - Network error problem solution

1.2.10 Training Videos

Here you can find a list of all training videos on Flexible Survey:

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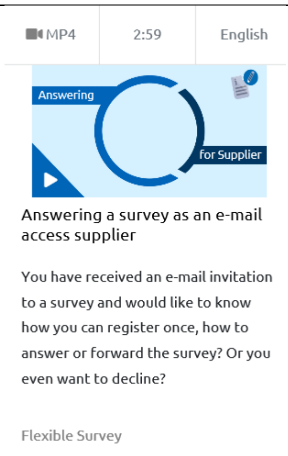
<td>
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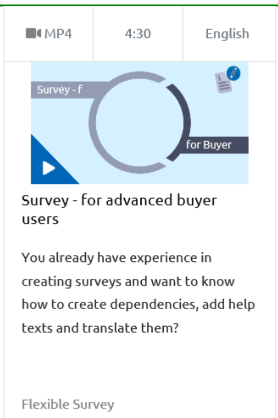
<td>
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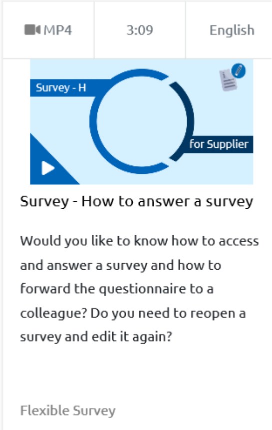
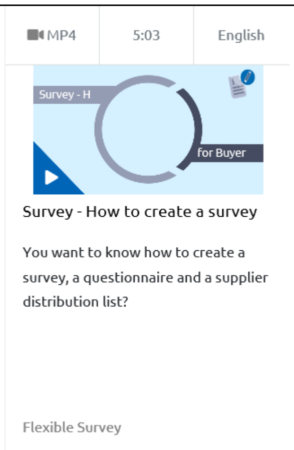
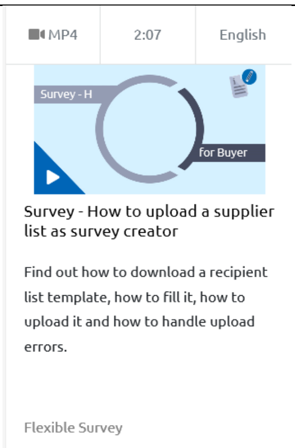
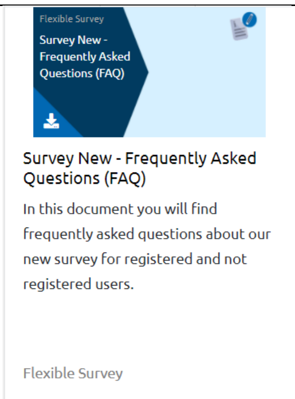
	https://streaming.supplyon.com/wp-content/uploads/videostreaming/1491/1f8a5333_3.mp4
	https://streaming.supplyon.com/wp-content/uploads/videostreaming/1491/1f8a5333_2.mp4
	https://streaming.supplyon.com/wp-content/uploads/videostreaming/1567/f185d86d_1.mp4
	https://service.supplyon.com/ml/mediator.php?req=aHR0cDovLzEwLjIyNi4xNTQuMTM4L2Q4L2Q4L3dlYi9zaXRlcy9kZWZhdWx0L2ZpbGVzLzIwMjAtMTEvU3VydmV5JTIwTmV3JTIwRnJlcXVlbnRseSUyMEFza2VkJTIwUXVlc3Rpb25zXzIwMjAwNjEwLnBkZg==_type:pdf

2 Support

2.1 Customer Internal Support

Input of contact data of customer intern support centre of key users.

2.2 SupplyOn Customer Service

SupplyOn offers an online help service which provides a guideline for buy- and sell-side users. You can access the online support by clicking the link “Help and support” displayed in the upper right corner of SupplyOn Project Management. The online help offers training videos and provides an overview of what is essential to know.

If you have a specific question and need additional support please contact the SupplyOn Customer Support. You will find contact information on the SupplyOn web-site: www.SupplyOn.com in the “Support” area.