

# 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)
		<b>Create Group name as Helper Text for BD Fields</b> BD-Fields now have the group name as additional identification shown (p.28)
		<b>Remove "addother" from Questionnaire Creator</b> 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)
		<b>Recipient list:</b> One can use the supplier ID in excel upload for recipient list (p.15)
		<b>Questionnaire Navigation Bar</b> : Navigation/editing bar is on the right side (no Pop-Up window). Screenshots/ explanations are adapted ( <b>p.24</b> )
		<b>Survey Evaluation:</b> 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)

		SUPPLYON
2.0	11.01.21	Version History Insertion of version history
		<b>Questionnaire Field Types:</b> 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: <u>www.SupplyOn.com</u>

### 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.



SUPPLYON M	ly SupplyOn	SupplyOn Services 🔻	Administration  Vews			
	Management Cockpit					
My SupplyOn:SupplyOn	Services	Sourcing				
		Business Directory	plyOn Services Discussions and notifications			
		Document Management				
		Performance Monitor				
		Problem Solver	Management Cockpit			
		Project Management	Transparency at a click: An overview of processes with your business partner.			
		Action Management				
	WebEDI / VMI					
		AirSupply	SupplyOn Sourcing			
		Collaboration Folders	SupplyOn Sourcing enables you to efficiently manage the requesting and offering p registered on SupplyOn or not: SupplyOn Sourcing gives a quick overview of incon			
		Visibility & Analytics	submitted offers.			
		TOMS 2.0				
		Flexible Survey	SupplyOn Document Management			
		Procurement	SupplyOn Document Management provides suppliers with current documents abort for example, standards and drawings. Using the search, suppliers can find the doc	ut their customers like, uments quickly and		
		Technical Review	reliably. If desired, SupplyOn notifies suppliers of all changes to documents via e-n	nail.		
			🛓 🛧 🍫 SupplyOn Performance Monitor			

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

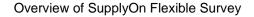
A Survey consists of a questionnaire and a recipient list. The survey is "the basic framework" as it contains the basic information. The questionnaire defines the content and the recipient list indicates to whom the survey is addressed to.

After you selected "Flexible Survey", you will be redirected to the library page **1**. 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 **3**). 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 ② 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 ③.

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.





SUP	PLYON My Sup	oplyOn Supply	Dn Services 🔻 Admin	istration <b>v</b> Ne	ws						
		SupplyOn > Flex	ible Survey > Library > Surveys								
Flex	ible Survey	Surveys	Questionnaires	Recipient Lists							
	Library	+ Create	ر Download								
1	Creator		Name	Status	Access	Creation Date	Created By	Remainin	Due Date	Modification Date 🔸 3	Modified By
	Uploads Help and Support	ν	Ŷ	V	V	Ŷ	¥	V	Υ	Y	V

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:

- 1 "Create" a recipient list
- ② "Upload" a recipient list

Survey	Surveys	Questionnaires	Recipient Lists		
I Library	+ Create				
✓ Creator	ID I	Name		Creation Date	Created By
Uploads     Uploads     Help and Support	V	V		$\nabla$	V
	287	Supplier self- assessment recipi	ents	March 16, 2020 11:50 AM	bfischer schuster Buyer
	315	CSR SAQ Recipients		March 25, 2020 9:11 AM	bfischer schuster Buyer

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 **Create** button. Enter a name (editable laterwards) **1** for the recipient list and click on

"Create" 2. This button will be enabled after inserting the title



Create New Recipient List	
1 Name of Recipient List *	9
Please enter a recipient list title with at least 5 characters.	
Please enter a name for the recipient list first	
2 Return Create	

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 **1**. It is possible to modify the name of the recipient list **2**.

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. **3** 

ate New Recipient List						
SO 11088 Zertifikat Abfrage			-			0
	You have saved y	our recipient list. ×				
istered recipients Unconnected recipients Unregistered recipients						
df recipients • 🔋 Remove Recipients						
elect connected recipients						
dd recipients by e-mail	Spinid	Supplier ID	DUNS	City	Country	
	7		V	V	V	

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 **1**. You can search either by "Company Name", "Business Service IDs", "City", "Country", "SPIN ID" and also by "Supplier ID".

Select connected recipients					
Company Name	SpinId	Supplier ID	DUNS	City	Country
$\nabla$	$\overline{V}$	$\nabla$	$\nabla$	7	$\nabla$
Coading					
Cancel					

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 2 or twice 3, the supplier is added as follows:

Clicking once 2:	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 3:	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 <b>4</b> 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 <b>5</b> .



Select connected recipients							
`		trg-MACS TEST 006 GmbH	27	Teststadt			
	4	trg-Saller SA (DEMO COMPANY)	21	Waiblinge			
		Lukas Traut					
		Franz Abele					
5		Karl Maurer					
		Antonio Esposito					
		Anna Mueller					

Figure 7 - Selecting a specific user

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

Select cor	nected recipients						
	Company Name	Business Service IDs	Supplier Reference ID	City	Country	Spin-ID	
1	ν	Υ	v	Y	Y	V	
· □	Chongqing Futai Coating Technology Co., Ltd.	9		Chongqing	CN	2294173	
>	Demo Supplier EDI-Surcharge	31		Muenchen	DE	2242258	
2 =	Fischer Tech (Suzhou) Co., Ltd.	9		Suzhou	CN	2024214	
> =	Jiang Su BoJun Industrial Technology Co., Ltd	9		Kunshan	CN	2058098	
>	Ningbo Shenhe Bearing Co., Ltd.	9		Ningbo	CN	2080322	
>	Shanghai Yahong Moulding Co., Ltd.	9		Shanghai	CN	2260133	
>	test company aaa	7		Shanghai	CN	2296427	
>	Test Seller (SVO)	4		München	DE	2056585	
, .	Test Seller 1 - DEUTZ	16, 7		Hallbergmoos	DE	2065517	
, <mark>3</mark> ₂	trg-Acceptance Siemens Seller	9		Hallbergmoos	DE	2051447	
						Rows per page: 10 ♥	1-10 of 22   < < > >
Cancel	Confirm 4						



#### 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 **1**. If this supplier does not have any existing connect on the SupplyOn Platform, you will get the notification "No matching users were found" **2**. Afterwards click on "Add unregistered recipient" to add this supplier to your recipient list **3**.

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 **④**. In this list you can also search after certain criteria **⑤** (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 **③**.

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.

Add recipients by e-mail							
Enter e-mail address test@gmx.de		2	No matching users were for Search	und. X Reset search			
Once the search	ed E-Mail address already exists	as a registered user on our p	latform, suitable companies ar	e recommended.			
Company Name	User name	Company Type	Business Service IDs	Supplier Reference ID	City	Country	SpinId
y <b>5</b>	<b>v</b> (	V	∑ ™ rows to show	$\nabla$	$\nabla$	γ	$\nabla$
Done Add unregistere	d recipient						

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**.

Edit Recipient List							
Name of Recipient List * Corona Survey Recipients							
Registered recipients Un	connected recipients U	nregistered recipients					
Add recipients -	Remove Recipients						
Com	npany Name		Spinid	Supplier ID	DUNS	City	Country
Ÿ			7	$\nabla$	$\nabla$	7	$\nabla$
Return 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 **1**. You will be guided directly to the Upload function for a new Recipient List.

SUPPLYON My Supp	lyOn Supply(	On Services ▼ Administration ▼ News
	SupplyOn > Su	urvey > Library > Recipient Lists
Survey	Surveys	Questionnaires Recipient Lists
III Library	+ Create	I
Creator	ID	Name C
Uploads     Uploads     Help and Support	V	Y
	287	Supplier self- assessment recipients

Figure 11 - Upload function for recipient list

Download the Excel Template **1** and open the downloaded file (the file either appears in the bar at the bottom of your screen or in your download center) **2**.

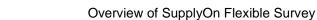
Rec	ipient Lists				
Ŧ	Upload Excel	I Excel Template			
ID	Name	Creation Date $~~ \psi$	Uploaded File	Status	Result
V	2 7	¥		又 No rows	to show
	invitation_list_temxlsx	~ ^		Notowa	CO SHOW

Figure 12 - Download Excel Template for Recipient List

Fill out the excel document either manually or by copying the supplier information into the document **1**. After you have inserted all the suppliers, save the document **2**.

⊟ 5ਾ ੋ ਾ ₹ਾ				invitation_list_template (4).xl	sx - Excel	
Datei Start Einfügen	Seitenlayout Formeln Daten	Überprüfen Ansicht	Entwicklertools H	lilfe 🛛 🖓 Was möchten Sie tun?		
Kopieren → Einfügen	Calibri $\cdot$ 11 $\cdot$ $A^{*}$ $A^{*}$ F     K $\underline{U}$			n % 000 % + Fo	Bedingte Als Tabelle	Zellenformatvorla
Zwischenablage	Schriftart 🗔	Ausricht	ung	ra Zahl ra	Formatvori	
H17 • : ×	$\checkmark f_x$					
A	В	С	D	E	F G	Н
1 SPIN ID 2 1	Supplier ID	Company Name	Street	City	ZIP Code Cour	ntry Contact E-Ma

Figure 13 - Inserting suppliers to excel recipient list





If you move the mouse over the headlines or the red triangle 1 the "mouseover" text will be displayed 2. This text explains which users are invited to the survey if certain information is entered or missing.

	٨	1	В		C	D	E		E		6
1	A SPIN ID	ompan				company data colum	_	oithor CDIN II	F Dinor ompil addross	are filled	
2	SPINID	ompan	y Name			Il try to find active u					
2					-	provided company d		inesson ector	ysenerstandard at t	company	
4					····· •	,					
4				lf s	uch users a	re found, they will b	e added as registe	red recipient	s for that company.	If there	
5						sers with role Busin	-				
0				use	ers with role	e CompanyAdmin ar	d add those as reg	gistered recip	ients for that comp	any,	
/				ins	tead.						
8									2		
9				lf r	no active us	ers are found for eit	her role, not all fiv	e company d	ata columns are fill	ed, there is	
10						natching the provide			-	ne provided	
11				cor	npany data	, an error will be rais	ed and no recipier	nts will be inv	ited for that row.		
12											
13						company data and e			but SPIN ID is not	filled, the	
4				sys	tem will try	/ to find a matching	user at that comp	any.			
15				16 4	hara ara uz	ers with that email a	ddroce at the com	nany matchi	a the provided corr	annu data	
16						will be added as reg				npany data,	
17				all	unese users	will be added as reg	istered recipients	for that com	pany.		
8				lf n	no such use	rs are found, not all	five company data	o columns are	filled, there is no o	ompany	

Figure 14 - Excel Recipient List Mouseover Information

#### Reminder:

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:

- o 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:  $\rightarrow$  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:
  - o 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 **1**. Click on "Browse" **2** and look for that excel file you were just editing. Select it **3** and click on "open" **4**. In order to save the document, click on the "Upload" Button **5**.



Upload New Recipients		
Name of Recipient List * 1 ISO090909		
2 Browse Select file	Name         Date modified         Type         Size           © mutation_file_tends         3         17:04.2000 054.77         Microsoft Excell W         12.82	5
Back to Uploads		
	ame [invitation_list_template.ulus v] Custom Files ("stg".slas) v]	
	4 Open Cancel	

Figure 15 - Upload the recipient list

When the Excel document has been successfully uploaded, a notification appears at the top of the screen **1**. It also appears in the "Status" column that the document has been uploaded **2**.

#### Please note: 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 3.

Now you will see if the Recipient list could be created: "Success" means that the recipient list has been created successfully ④. 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 **5**. The table has to be edited before it can be uploaded again (see below).

JPPLYÓN) My Sup		)n ≯ Surve	y > Uploads > Recipient	Lists			
survey	Recip	ilent Lists			<ol> <li>Successfully up</li> </ol>	loaded $\times$	
Library		Jpioad Exc	Download I	xcel Template			
Creator	ID		Name	Creation Date	Uploaded File	Status	Result
Help and Support	V		Υ	V		Ŷ	
	159		150090619	April 23, 2020 7:44 AM	RDBMS-e958e044-05b4-4483-a2b	Uploaded 2	
	157		1500906	April 22, 2020 10:10 AM	RDBMS-a57804d6-98e2-47ec-bfe	Success	An invitation list was created successfully
	156		ISOsdf	April 22, 2020 9:53 AM	invitation_list_template.xlsx	Success	An invitation list was created successfully
	149		1500099	April 17, 2020 11:56 AM	invitation_list_template.xisx	Success	An invitation list was created successfully
	159		150090619	April 23, 2020 7:44 AM	RDBMS-e958e044-05b4-4483-a2t Pro	ocessing failed 5	The validation of some rows failed

Figure 16 - Status of uploaded recipient list

If the "Processing failed" click on the ... Symbol 1 and choose "Download errors (Excel)" 2.



_	ipient Lists				
*	Upload Excel	I Template			
ID	Name	Creation Date $~~ \psi$	Uploaded File	Status	Result
V	7	Υ		$\nabla$	
159	1 ISO090619	April 23, 2020 7:44 AM	RDBMS-e958e044-05b4-4483-a2b	Processing failed	The validation of some rows failed
157	₹ Upload again (Excel)	April 22, 2020 10:10 AM	RDBMS-a57804d6-98e2-47ec-bfe <sup>-</sup>	Success	An invitation list was created successfully
156	Download errors (Excel)	2 April 22, 2020 9:53 AM	invitation_list_template.xlsx	Success	An invitation list was created successfully
149	IIII Open created Recipient Li	April 17, 2020 11:56 AM	invitation_list_template.xlsx	Success	An invitation list was created successfully

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" **1**. 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.

6	5° ° T =				RDBMS-12f	cbdd1-3640-4194-9e14-5	553e25c37d83.xlsx - Excel		
Dat	tei Start Einfügen	Seitenlayout Formeln	Daten Überpri	ifen Ansicht Hilfe	VWas möchte	n Sie tun?			
-	db Musselineiden	Calibri - 11 -	∧ ∧ = =	ir it Textumb	ruch	Text -	<b>R</b> 🕖 🗐	🖬 🐐 📑	∑ AutoSumme -
Einfü	gen 🔧 Format übertragen	F K U - 🖂 - 🙋	• <u>A</u> • = = =	Verbind	en und zentrieren 🔸		Bedingte Als Tabelle Zellenformatvorlage Formatierung - formatieren		Ausfüllen +
	Zwischenablage Fi	Schriftart	n,	Ausrichtung	- 14	Zahl 5	Formatvorlagen	Zellen	1
G13	• 1 ×	$\checkmark = f_{\rm F}$						0	
al.	A	в	C	D	E	F	G	н	J
1 :	SPIN ID	Company Name	Street	City	ZIP Code	Country	Contact E-Mail	Validation Message	
2		SupplyOn AG	Ludwigstraße 4	IS Hallbergmoos	853	899 DE	testxy@supplyon.com	No company could be fou	nd for given criteria
3									

Figure 18 - Download Errors of Recipient List

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

A	B	c	D	E	F	G	1	K L	M	N	
SPIN ID	Company Name	Street	City	ZIP Code	Country	Contact E-Mail	3				
202877	0					peter.fischer@supplyon.com		OK - only users with that	email at that company		
200023	1							OK - all users with BDSell	erStandard or CompanyA	Admin at that comp	any
	Invalid Company	Invalid Street	Invalid City	Invalid ZIP Code	GI	3		ERROR - company with pr	rovided data does not ex	ist	
	trg-Rauch KG	Ludwigstr. 49	Hallbergmoos	85399	D	E		ERROR - company with pr	rovided data does not ha	ve any users with n	equired role
	kan_07	kan_07	kan_07	kan_07	A	F peter.fischer@supplyon.com ted.tester@example.com		OK - only users with that OK - exactly provided en			

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":

SUPPLY ON	My SupplyOn	SupplyOn Services 🔻		Administration <b>v</b>	News
				My User Account	
My SupplyOn:Suppl	lyOn Services			My Substitutes	
			Su	User Management	hs and n
				Company	
				Logistics Settings	
				Configuration of Services	nt Coo
				Suppliers' Rollout	elisk: An
				Optimized Rollout	

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

Click on "Supplier Overview":

My SupplyOn > SLM				
Welcome Overview	(a)			
ly Tasks	Rollout cockpit			
ollout	Ronout cockpit			
Supplier Rollout	Overview			
Supplier Rollout Template				
Mass Supplier Rollout				
lonitoring	Tasks	Rollout	Monitoring	Extras
Registration Overview		Second States and		
Service Overview	My Tasks (1)	Supplier Rollout	Registration Overview	Mail Templates
Supplier Overview		Supplier Rollout Template	Service Overview	Retention Mailing
E-mail suppliers overview		Mass Supplier Rollout	Supplier Overview	Flexible Fields
Escalation Overview			E-mail suppliers overview	
Retention Overview			Escalation Overview	Service-specific Contact
ktras			Retention Overview	
Mail Templates				
Retention Mailing				
Flexible Fields				
Notifications				

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



Make a wildcard search with " \* " or search a special supplier ①. Filter on the Service "Business Directory" ②. Afterwards you can download the list as an Excel File ③. That file will contain the Supplier ID information that you can use for creating the recipient list.

Area:	A	All .	~	Flex_1:	All	✓ Flex_3:		All	~	
Material Group:	_	NI	~	Flex_2:	All	✓ Flex_4:	Ì	All	~	
Company	name, (	D-U-N-S, Su	pplier ID:	• 1 You can use	the charact	ers "*" and "?" for a wildcard searc	h.		Search	
Seller	Contac	t 🔿 Buyer						Conta	ct Search	
Send E-	mail	CSV Down	3 Star	t Rollout	Suppres	s Stopped		Re	set Filters	
¢cg	🗌 all	D-U-N-S	Supplier R	teference ID	Supplier	Service/Address 2	s	tatus Reg	Status E/Ret	Supplier Contact Pers
Demo						L				
Supplier	_				Demo Supplier	Sellerstrasse 1, Muenchen, 81379,	DE			Supp, LyOn
EDI- Surcharge		999996042			EDI- Surcharge	SCM (EDI-Surcharge)			•	Keber, Steffen
Digital AG			5021		Digital AG	Supplier Street 4, Digital City, 815			-	Babel, Rainer
						Business Directory	4	•	•	Babel, Rainer
Digital						Supplier Street 3, Supplier City, 81	5, CN			Mannes, Jörg
GmbH			4920		trg_Digital GmbH	Business Directory			٠	Babel, Rainer
					Shiph	Sourcing Manager				Mannes, Joerg

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 **1** and click on the "Copy" button**2** 



	SupplyOn > Surve	ey > Library > Recipient Lists		
Survey	Surveys	Questionnaires	Recipient Lists	
I Library	+ Create	✓ Copy		
Creator	ID	Name		Creation Date
O Uploads	V	7		$\nabla$
e Help and Support	<b>1</b> <u>414</u>	Training Companies		April 8, 2020 10:29 AM

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" 1 and:

• Use the "Create" Button **2** 

OR

• Select an existing questionnaire by ticking the checkbox 3 and click on the

"Copy" button **(4)**. The copy can be edited individually and is completely detached from the questionnaire from which it originated.



SUPPLYON My S	upplyOn Suppl	yOn Services ▼ Administration ▼ News						
	SupplyOn > Fi	exable Survey > Library > Questionnaires						
Flexible Survey	Surveys	Questionnaires Recipient Lists						
III Library	2 + Create	▲ Copy 4						
✔ Creator	ID	Name	Status	Access	Creation Date	Created By	Modification Date $~~ \psi$	Modified By
Uploads     Help and Support	v	Υ	γ	V	V	Υ	Υ	Υ
	3 76805	SUPPLIER	Draft	My Company	January 12, 2021 5:32 PM	Questionnaire	January 12, 2021 5:32 PM	Questionnaire
	71168	Test file questions	Active	Only Me	November 12, 2020 5:10	SupplyOn AG Survey On	November 12, 2020 5:10	SupplyOn AG Survey On
	68874	first contact 20201019_12:05:30	Active	Only Me	October 19, 2020 1:05 PM	SupplyOn AG Survey On	October 19, 2020 1:05 PM	Recipient

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:

- 1: Here you can see the different question types. By dragging and dropping you can add a question (in the selected type) to your questionnaire
- 2: This allows you to undo or redo individual edits.
- 3: Set the title for your questionnaire by clicking on "Set Title" (see 2.2.4.1.3 Edit survey settings)
- 3\*: The title is displayed here

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

4\*: The page title will be shown here

SL	JRVEY DESIGNER TRANSLA	ATION				
1 MY	QUESTION TYPES	C REDO	* SET TITLE			
	Single Input	page1	✓ × page1 ∰	<b>&gt;</b> +		_ 4
	Checkbox	<b>A</b> .	edit 🗊		.page1	× ,
82	Radiogroup	3* Title	4 2		pager	
=	Dropdown	The				
	Comment				Title	Page1Title 4
ø	Boolean	4 * Page1Title			THE	ragernite
	File					
	Business Directory Field					

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 **1** will open automatically.



#### 1.2.4.1.3 Edit questionnaire settings

By clicking on "Set Title" 2 the right sidebar will pop up, where you can add a title for your questionnaire 3. The predefined language is English. This can also be changed here 4. The settings are automatically saved, you do not have to press any special save button.

1	SURVEY DESIGNER	TRANSLATION		
	MY	D UNDO C REDO & SET TITLE	PROPER	TIES
	👳 Text In	page1 🔹 page1 🛠 Add New Page +	Survey	•
	Checkb		•	
	Cadiog		Title	
	Propd	Input page title here	3	
	Switch	input page title here		_
L .	File File		Default language	
	Busine		4 Default (english)	<b>.</b>
	H Headline		4	
	? Question			
		Diseas dues a substitut hous		

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 **1** or in the dropdown page overview **2**. You can edit the name / delete the page / copy the page by clicking on the "gear symbol" **3**. The page title can additionally be changed in the side bar **4**.

Ques	stionnaire	Translation							
MY		SUNDO C RE	DO H	¢ SET TITLE			1	8	PROPERTIES
QUE	STION						1		
<b>9</b>	Text In	page1 🗸	*	page1 🌣 <mark>3</mark> page2 🌣	page3 🌣 💙	Add New Pag	ge 🕇 🗳	.page1	×
<b>~</b>	Checkb	page1 page2		💉 Edit 💿 💣					
8=	Radiog	page3 page4					^	Title	
Ě	Dropd	page5					_	Test	
2	Switch	Add New Page 2						lest	4
•	File	-1050							
	Busines								
н	Headline								
?	Question								

The selection of pages can be done either directly in the questionnaire 2 or in the sidebar 4.

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 **1**. 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 **2**.

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

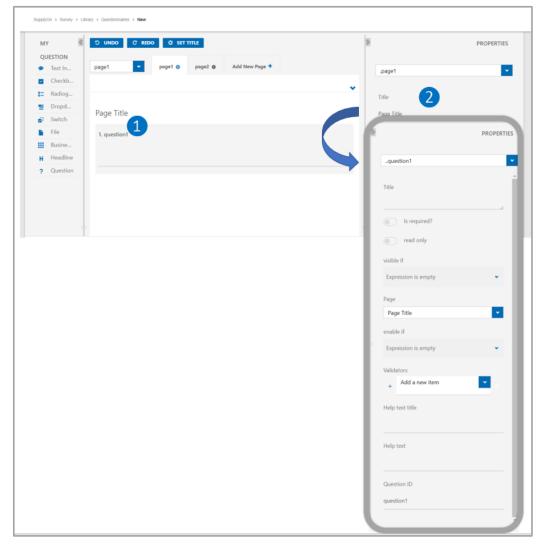


Figure 28 - Add Questions to Questionnaire

#### 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:



Туре	Buyer View	Seller View
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	1. question1	*Mandatory
any text.		question2 question2
Checkbox Question possibility with predefined answer options, where one or more answers can be selected.	■ <u>Edit</u> • <u>*</u> <u>*</u> <u>*</u> <u>*</u> <u>*</u> 2. question2 item1 item2 item3 +	question2     question2       item1     item1       item2     item2       item3     item3
Radiogroup Question possibility with predefined answer options, where only one answer can be selected.	Edit • • * I = • * </td <td>question3 item1 item2 item3</td>	question3 item1 item2 item3
Dropdown For the question "Dropdown" any number of possible answers can be given. To add answer choices, click on the "+" Symbol 1. Question settings can be made by clicking on "Properties" (the right sidebar will open, see here) 2 To change the question options 2, 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 <b>one option</b> of the predefined answers.	I. Question Title (Dropdown) Choose Edit Choices Item 1 Item 2 Item 3 I +	question4       V         item1       V         item2       V         item3       V



SWITCH THE SWITCH TYPE IS USED IF THE ANSWER OPTIONS OF A QUESTION REPRESENT A "YES/NO" OR "TRUE/FALSE" CHOICE.	Edit O O X   P 6. question6 No Yes	<ul><li>question6</li><li>question6</li></ul>
File This question type asks the respondent to upload a document.	Edit O O X   T. question7 Datei auswählen	question7 Browse Upload file
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.		Q. Search List         - Company         - Charge Company Data         - Executive Board         - Overall Account Manager         - Director Logistics         - Director Coulity         - Ontext Person for Compliance         - Contact Suppler Declaration         - Number of Employees         - Contact Suppler Declaration         - Number of Employees         - Contact Suppler Declaration         - Social Component System         - Social Management System



Remind for Certificate BD field:		
Relative Date: You can decide for how long a certificate is max. valid <b>1</b> . 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) <b>2</b> .	SWEYY DESIGNET VY QUESTION TYPES Single input Checkbox Checkbo	
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	SURVEY DESIGNER TRANSLATION  MY QUESTION  TYPES  Text Input Checkbox  Radiogroup Dropdown Switch File Business H Headline Cuestion  Add New Page +  Cuestion  Cuest	.question2       Image: Compare the second sec

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.

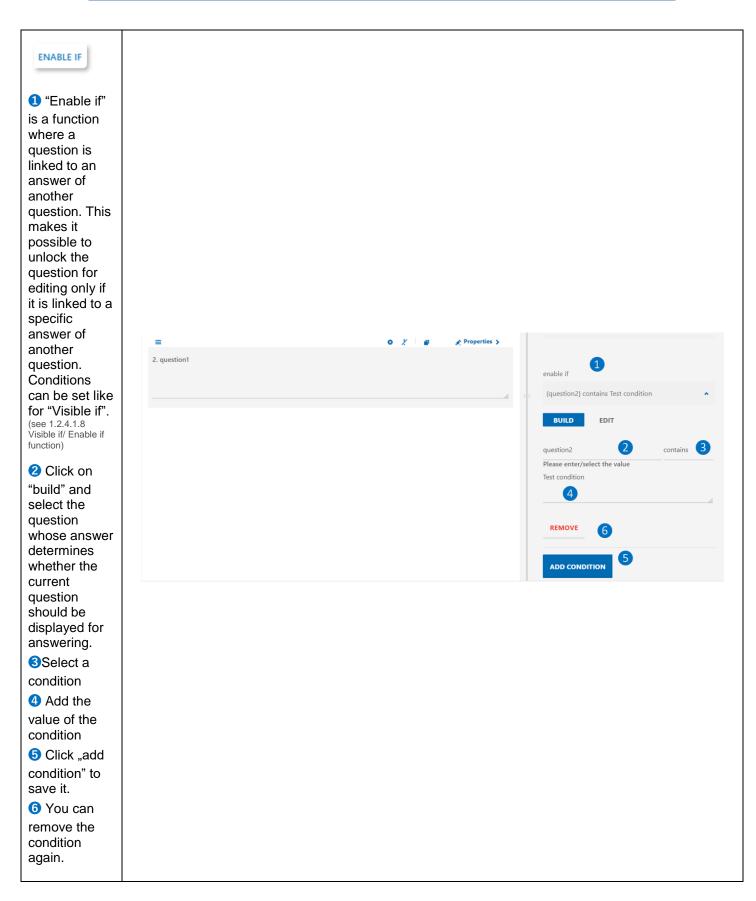


Туре		
<ul> <li>Edit</li> <li>GENERAL</li> <li>It is possible to</li> </ul>	SURVEY DESIGNER TRANSLATION	
give each question a title, which makes it easier to search for the question when creating the survey	MY DUNDO C REDO C SET TITLE QUESTION Text In C Checkb Radiog	PROPERTIES
2 To mark the question as a mandatory field, the check mark must be set.	<ul> <li>Dropd</li> <li>Switch</li> <li>File</li> <li>Busine</li> <li>H Headline</li> <li>Question</li> </ul>	<ul> <li>Is required?</li> <li>read only</li> <li>visible if</li> </ul>
3 You can also make the question a "read only" field. No answers can be given then.		Expression is empty



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	🚆 Dropd					
another	Switch	Page Title			read only	
question. <ul> <li>Click on</li> </ul>	File Busine	1. question1			visible if <b>1</b> Expression is empty	•
"build" and	H Headline			<i>µ</i>		
select the question	? Question	=	o X 🛛	💉 Properties 🗲	BUILD EDIT	
whose answer		2. question2			question1 2 Please enter/select the value	equals 3
determines whether the	<				4	is not empty equals
current						not equals contains not contains
question should be					REMOVE 6	any of all of greater
displayed for answering.					ADD CONDITION	less greater or equals
_					ADD CONDITION	less or equals
Select a condition						
condition						
4 Add the						
value of the condition						
5 Click on						
add						
condition" to save it.						
6 You can						
also remove						
the condition again.						
(see 1.2.4.1.8 Visible if/ Enable if						
function)						







#### VALIDATORS

1 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.

2 Please

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

2\* You can delete the validator with the " - " sign.

3 Text: Can

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

4 Regular

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

<b>~</b> 2*
I



100". Would		
raise an error		
if the		
summary is		
less than		
100).		
100).		
5 You can		
define the		
min. + max.		
length of the		
text.		
6 Here you		1 Validators
can define if		expression
digits in the		
text are		Test
allowed		Text
7 Expres-	1 Validators	3
sion:Here you	text	Expression
can select the		Expression is empty
refence	Test	Expression is empty <b>7</b>
question and	Text	
the conditions.	3	BUILD EDIT
8Click on	Minimum length	Select question 8 equals 9
"build" and	0	Please enter/select the value
select the		
question	Maximum length	
whose answer		REMOVE
determines	0	—— <b>1</b> 0
whether the	_	
current	Allow digits 6	ADD CONDITION
question		
should be		
displayed for		
answering.		
9Select a		
-		
condition and		
add the value		
of the		
condition		
Olick "add		
condition" to		
save it and		
"remove" to		
delete it.		



<ul> <li>+ 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).</li> <li>Always assign a QuestionID. You will need this to make references or conditions to a question ID will also be displayed</li> </ul>	E 2. Title of Question		• X • Properties >	PROPERTIES          .testQuestionID          Survey       .agestion2         .questionID       4         .testQuestionID       ////////////////////////////////////
here.				
<ul> <li>Delete Question</li> <li>To delete a question, click on the icon 1.</li> </ul>		E 2. question1	<b>1</b> ∘ <i>1</i>	Ž ■ Properties >



IS REQUIRED / IS NOT REQUIRED / IS NOT REQUIRED Decide here if a question should be mandatory (also possible in the right- side bar <sup>2</sup> ) Not mandatory is set by default	E		1 × × Properti	que Gen Title visible	Is required? 2 e if ression is empty	
<ul> <li>Copy</li> <li>You can also copy a question by clicking on this symbol.</li> <li>Afterwards you can choose the position via drag and drop.</li> </ul>		E 2. question1		• *	Properties >	

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 **1**. 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 **2**. Afterwards choose the type of condition you want to make **3** and insert the value of your condition in the text field **4**. Then either click on "add condition" **5** to save it or on" remove" to delete the condition**6**.

Input page title here ■	◎ ٪ ■ ∞	Properties >		
1. Test for visible/enable if				
1				
		/_	visible if	
			Expression is empty	•
2. question1			BUILD EDIT	
			BOILD	
		k <>	Select question	equals
			Select question question1	is empty is not empty equals
3. question3			question3	equals not equals
			REMOVE 6	contains not contains
		/_		any of all of
			ADD CONDITION 5	greater less
				greater or equals less or equals

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 ① 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 <u>1.2.4.1.8</u>. Visible if / Enable if function.

To find out the Question ID, click on the question that will later be used in your condition **2**. In the sidebar in the upper right corner you will see the QuestionID **3**.

O UNDO C REDO Q SET TITLE	PROPERTIES
page1 V page1 page2 ¢ page3 ¢ page4 ¢ Add New Page +	.question1 3
Supplier qualification / self-assessment	Business Directory Explorer
General data - Company data	Please enter at least 3 characters to search for fields and groups from the business directory.
conclui data - company data	Q. Search List
1. DUNS Number	<ul> <li>Change Company Data</li> <li>Company name</li> </ul>
	O Commercial registration number
	Company Data updated at
E Properties >	O VAT number
Change Company Data » Company name *	
	O Unified Social Credit Code
	Company Data updated by

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

Then click again on the question that should contain the condition **④**. Select now in the area "visible if" **NOT** " Build" but instead **choose "Edit" ⑤**. Afterwards insert the condition into the text field, which consists of the QuestionID and the expression **⑥** (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.

su	JRVEY DESIGNER	TRANSLATION										
	Y QUESTION	D UNDO C REDO	SET TITLE							2		PROPERTIES
	Text Input	page1 🗸	page1      ☆	page2 🌣	page3 🌣	page4 🌣	>	Add New Page 🕇			DUNSNumber	•
~	Checkbox	C 11 11C .							<b>^</b>		visible it	
80	Radiogroup	Supplier qualificat	ion / self-asse	essment					^		{question1} is empty	•
1	Dropdown								- 1		<b>5</b>	
<b>9</b>	Switch	General data - Con	npany data						- 11		BUILD	
	File		ipany aata			• X	•	A Properties >	. 8		{question1} empty	
	Business	1. DUNS Number									6	
н	Headline		4									
?	Question											
												le

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'] <b>OR</b> {question1} = 'Test value or Number '	Question is shown/enabled when "question1" is exactly the value: [item2] <b>OR</b> is exactly the item list ['item2', 'item3', 'item4', 'item5'] <b>OR</b> '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 <b>one</b> <b>value</b> of a list of values or contains a specific value/number.
not contains	{question1} notcontains 'test' <b>OR</b> {question1} notcontains 'item5'	Question is shown/enabled when the answer of "question1" contains <b>not a</b> <b>specific value</b> 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 <b>one</b> 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 <b>all</b> 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" **1** and select the language **2**.

Questionnaire Translatio	n	
MY QUESTION TYPES	D UNGO C REDO O SET TITLE	PROPERTIES
Text Input	page1 v page1 o Add New Page +	Survey
Checkbox		•
: Radiogroup		Title
Propdown	Test	Test changing running questionair
Switch	1631	reak changing running queatorium
File	1. Test	Default language 2
Business Directo		Default (english)
H Headline		Visible for all users of my company
? Question		Visione for an users of my company
	2. question2	
	A met	

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" **1**. Afterwards press the button "REPLACE STANDARD TRANSLATION". The duplicate language will then disappear (e.g. here: "Default (deutsch)" will remain "deutsch" will disappear) **2**.



Questionnai	Translation	
Select langu	age to translate 💙 Show all pages 💙	
deutsch	2	
REPLACE ST	NDARD TRANSLATION	
	Default (deutsch)	deutsch
Title		
page1 🗸		

Figure 33 - Change default language

To translate the questionnaire, open the tab "Translation"<sup>1</sup>. The pages of the questionnaire <sup>2</sup> will be displayed, as well as the titles of the pages <sup>3</sup> and the individual questions <sup>4</sup> on each page and their possible answers <sup>5</sup>.

	Questionnaire	Translation	
	Select langua	ge to translate 💌 page1 💌 2	
	✓ deutsch		
		Default (english)	deutsch
3	Title	Test	<i>A</i>
	question1 🗸		
4	question2 🖍		
		Default (english)	deutsch
	Title	question2	<i>h</i>
5	choices 🗸		

Figure 34 - Translation of Questionnaire



Select the page on which you want to translate the questions **1**. And add the language you want the questions translated into **2**. You can choose from the 12 Basic SupplyOn languages.

Select language to translate 💙	page1	<b>~</b> 1		
Select language to translate				
español				
français				
italiano				
magyar				
português				
türkçe				
čeština				
русский				
日本語				
简体中文				
한국어				

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 **1**. The languages into which the questionnaire is to be translated appear in the columns next to the individual questions **2**. The translations must be entered manually **3**.

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) **4**.

Questionnair	e Translation		
Select langua	age to translate 💌 Show all pages 💌		
Title	Default (english) Test	deutsch	
page1 🖍		<b>3</b>	
Title	Default (english) Test	deutsch	
question1 🖍		A	
Title	Default (english) Test	deutsch	
Cancel	A Save as Draft Save and Close	м — Л	

Figure 36 - Entering the translation

If you want to change the default language go back to the tab "Questionnaire<sup>1</sup> and open "Set Title" <sup>2</sup>. Select the desired language as default <sup>3</sup>.



MY QUESTION TYPES		PROP
Text Input	page1 v page1 Add New Page +	Survey
Checkbox	Test	
Radiogroup	lest	Title
Dropdown		Test changing running guestionair
Switch	Test	
File		Default language 3
Business Directo	1. Test	Default (english)
Headline		

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:

Surveys	Questionnaires	Recipient Lists						
+ Create								
ID	Name 个		Status	Access	Creation Date	Created By	Modification Date	Modified By
7	$\nabla$		$\nabla$	V	7	$\nabla$	$\nabla$	7
093	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 18, 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" **1**. Now you will see the questionnaire settings. Then you can enable/disable the visibility by clicking on "Visible for all users of my company" **2** (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:
      - The survey could not be saved. The questionnaire was set to private access while the survey was created. Please set the access of the questionnaire to "Visible for all colleagues of my company".
      - 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:
  - o not used in any Surveys
  - $\circ$  ~ used in user's own Surveys with access type 'Only Me' ~



#### Also see <u>Recommendations for survey design</u>

MY QUESTION	JUNDO C REDO & SET TITLE	PROPE
TYPES Text Input	Seite1 Seite1 Ø Add New Page +	Survey
Checkbox	Survey Title	Trite
<ul><li>Dropdown</li><li>Switch</li></ul>	Page Title	Survey Title
<ul><li>File</li><li>Business Dir</li></ul>	General questions	Default language Default (english)
H Headline ? Question		Visible for all users of my company

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" (changes are not saved), "Save as Draft" (questionnaire is saved as a "Draft") and "Save and Close" (questionnaire is saved and "Active") at the bottom of the page.

ΜY		O UNDO C REDO C SET TITLE	\$	PROPERTIES
ງປ	ESTION Text I	page1 🗸 page1 🌢 Add New Page 🕇	s	urvey
1	Chec Radi	Test changing running questionair	▲ Tit	
1	Drop Switch File	Test	-	est changing running questionair
:	Busi Head	1. Test		efault language Default (english)
•	Ques			Visible for all users of my mpany
		2. question2		
		O item1		

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

In the questionnaire list 1 the questionnaires will be shown as "Draft" 2 and "Active" 3. 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).



Surveys	Questionnaires 1 Recipient Lists					
+ Create	/ Сору					
ID	Name	Status	Creation Date	Created By	Modification Date	Modified By
7	▽	7	7	7	7	7
235	Supplier self-assessment	Draft 2	March 11, 2020 11:25 AM	bfischer schuster Buyer	March 24, 2020 1:18 PM	bfischer schuster Buyer
255	CSR SAQ	Active 3	March 18, 2020 8:06 AM	bfischer schuster Buyer	April 8, 2020 7:03 AM	bfischer schuster Buyer
269	Business Continuity Management	Active	March 25, 2020 12:05 PM	bfischer schuster Buyer	April 15, 2020 11:12 AM	bfischer schuster Buyer

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 1 either use the "Creator" in the left sidebar 2 or click on the + Create button 3.

SUPPLYON My Sup	plyOn SupplyO	n Services   Administration	▼ News				
	SupplyOn > Sur	vey > Library > Surveys					
Survey	1 Surveys	Questionnaires Rec	cipient Lists				
⊞ Library	+ Create	3 🗄 Download					
Creator	ID	Name 个	Status	Remaining Time	Due Date	Duration	Buyer Company
Uploads	V	V	$\nabla$	V	Y	V	V
Help and Support	20-459	Business Continuity Management	Closed		April 16, 2020 8:48 AM	a few seconds	trg-B. Fischer AG
	20-468	Business Continuity Management – Surve	Active	in 2 days	April 23, 2020 3:04 PM	a few seconds	trg-B. Fischer AG
	20-462	CORONA Impact Survey - week 17	Closed		April 16, 2020 11:16 AM	a few seconds	trg-B. Fischer AG
	20-457	Corona BCM Survey	Closed		April 15, 2020 11:19 AM	a few seconds	trg-B. Fischer AG

Figure 42 - Create a survey

Both options will lead you to the same survey creating and editing page **1**.

The progress of the survey is displayed in the sidebar **2**. You will also be forwarded to the different positions of the survey if you click on the headlines **3**.

Enter the survey information in the different fields. The fields highlighted in red are mandatory fields **4**.

The grey fields are optional **5**. A question mark symbol is displayed next to each field **6**. By clicking on it, you will see the information about this field in the right sidebar **7**.



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 <sup>(3)</sup> 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 (9).

The Survey Creator can be closed at any time **(1)**: "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).

· • • •				1	
Flexible Survey		Create Survey Get more data from your suppliers		SUPPL	
Information     Questionnaire	1	Information		7	
Recipient List     E-Mail Notifications for Suppliers     Welcome and Confirmation Page	3	Survey Name*		0/200	6 0
Help and Support		Devorption 5		<b>0</b> /500	0
		Cast Immodately Start Immodately Start Date*	Start Time *	0	0
		8			
		De De *	Dus Time *	0	0
		Duzen tinutes 9		×	0
		Visible for all users of my company  Back to Library  Serve as Drait  University  Serve and Server			

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.

Surveys	Questionnaires Recip	sient Lists							
+ Create	🗄 Download								
D	Name	Status	Access	Creation Date $\nabla$	Created By	Remainin 个	Due Date	Modification Date	Modified By
7	$\nabla$	7	V	∑ december	$\nabla$	$\nabla$	$\overline{V}$	7	$\nabla$
20-864	Survey Test 04.12.20	Closed	Only Me	December 4, 2020 11:46 AM	SupplyOn AG Survey Onboarding		December 7, 2020 11:00 PM	December 7, 2020 11:00 PM	SupplyOn AG Survey Onboarding
20-649	MDM Test 01.12.20	Closed	Only Me	December 1, 2020 10:47 AM	SupplyOn AG Survey Onboarding		December 2, 2020 11:45 PM	December 2, 2020 11:45 PM	SupplyOn AG Survey Onboarding
20-865	(2) Survey Test 04.12.20	Closed	Only Me	December 4, 2020 1:02 PM	SupplyOn AG Survey Onboarding		December 7, 2020 2:30 AM	December 7, 2020 2:30 AM	SupplyOn AG Survey Onboarding

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:



0

- 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
  - o Also see <u>Recommendations for survey design</u>

Information	* Mandatory
Survey Name *	0
Description	0
Start Date * Ime * Ime *	0
Due Date * Oue Time * O 🕥	0
Duration * a few minutes	Ø
Visible for all users of my company	

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" 1 to add a reminder. You can then select a date on which the reminder

should be sent from the date picker **2**. Click on the trash can to delete the reminder **3**. It is possible to set a total of 5 reminders.



	(2)
1. Notification Date	< Aug 2020 > 🛛 📋 📳 🕄
	Mo Tu We Th Fr Sa Su
	1 2
+ Add Notification	3 4 5 6 7 8 9
	10 11 12 13 14 15 16
	17 18 19 20 21 22 23
	24 25 26 27 28 29 30 C
	31

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 **1**. 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 2. 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 **3**. The question marks next to the fields, show help information in the sidebar on the right **4**.

Welcome and Confirmation Page	* Mandatory	0
You can add additional text to the Welcome and Confirmation pages. Some		Help
standard text is already given and can not be edited.		This is the sta that is shown to recipients.
Dear ###SALUTATION### ###FIRST_NAME### ###LAST_NAME###, we velocome your company ###COMPANY_NAME### to the ####TITLE###, Filling out the survey takes around ###DURATION### minutes. It has to be filed out completely until ###END_DATE###.	0 4	
Additional text 2	•	
01500 characters		
Browse You can upload files after saving the survey as draft.	ipload 🖉	
Best regards, Your SupplyOn Team	0	
Content for Confirmation Page		
Dear ###SAUITATION### ###FIRST_MAME### ###LAST_MAME###, we thank your company ###COMPANY_MAME### for filing and sending out the ###TITLE###. We appreciate your timely and accurate submission before the due date ###END_DATE###.	0	
Additional text	•	
0/1500 characters		

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 1. They can be deleted again



by pressing the "Remove" button 2 but it is necessary to add the questionnaire and at least one recipient list as the field is mandatory 3. The selected questionnaire / recipient list(s) will be displayed in the list 4.

Questionnaire Select a questionnaire for this survey			3 Mandator
+ Select Queetionnaire			
Name	Creation Date	Modification Date	
customer satisfaction	April 14, 2020 12:43 PM	April 14, 2020 12:43 PM	
Recipient List Add recipient lists to this survey.  Add recipient lists to this survey.  Add recipient lists  Recipient Lists			* Mundator
Name	Recipients	Creation Date	Modification Date
Name Supplier celf-assessment recipients	Recipients 26	Creation Date March 16, 2020 11:50 AM	
			Modification Date March 16, 2020 11:50 AM March 25, 2020 9:11 AM
Supplier self-assessment recipients	26	March 16, 2020 11:50 AM	March 16, 2020 11:50 AM
Supplier self-assessment recipients CSR SLQ Recipients	26 35	March 16, 2020 11:50 AM March 25, 2020 9:11 AM	March 16, 2020 11:50 AM March 25, 2020 9:11 AM

Figure 48 - Add / remove Questionnaire and Recipient List

To add a Questionnaire or Recipient List you can either create a new one 1 or choose an already created one from the list. The questionnaires / recipient lists can be filtered by certain details 2. Choose your questionnaire or recipient list(s) 3 (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 4. The selected questionnaire / recipient list is now added to the survey.

+ Create Nev	v Questionnaire							
ID	Name	Status	Creati	ion Date Cr	eated By	Modification Date	Modified By	
ν	v 2	V	v	v		ν	v	
<b>3</b> "	Supplier self-assessment	Draft	March	h 11, 2020 11:25 AM bfi	scher schuster Buyer	March 24, 2020 1:18 PM	bfischer schuster Buyer	
0 255	CSR SAQ	Active	March	h 18, 2020 8:06 AM bfi	scher schuster Buyer	April 8, 2020 7:03 AM	bfischer schuster Buyer	
Add recipient	lists							
Add recipient		R	ecipients	Creation Date	Created By	Modification Da	ate Modified Dy	
Add recipient + Create New	Recipient List	R		Creation Date	Created By V	Modification Da	ste Modified Dy V	
Add recipient + Create New	Reconst List		7		Υ	Υ	Υ	



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" 1, select "Add Recipient List" 2 and choose the appropriate list 3.

Confirm your selection with "Confirm" **4** and finally click on "Update Survey" **5**.

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.



		recipient lists		
Monitoring	upplyOn > Flexible Survey > Creator > S	ur		
	Select a questionnalie for this surv	ю	Name	Recipients
Response Status	+ Select Questionnaire	Ā	7	7
		015	Survey 12.01.2021	1371
	ID	015		1
	671	e20		0
100%		3	TestFragebogen	0
100%		3	Tesi	0
	Recipient List	017	Fig	00
		637	RSC	1
	Add recipient lists to this survey.		Supplie _	1
Unopened	+ Add recipient lists	807		6269
underen.		014	Pi ent	85
	ID Na			
Recipient Status	916 Su	4		
Download Report		Cancel Confirm		
Back to Library Edit Survey Resend Invitation			anima set of a last for several with a function of all least three days. These equal the function of your survey.	

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

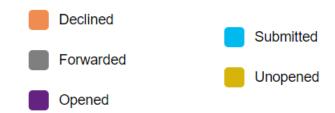
To get to the monitoring open the survey library 1 and click on the survey (name) you want to evaluate or want to have more information 2.

	SupplyOn > Surv	vey > Library > Surveys					
Survey	Surveys	Questionnaires Re	cipient Lists				
E Library	+ Create	🗄 Download					
✔ Creator	ID	Name	Status	Remaining Time	Due Date	Duration	Buyer Company 🏹 🤸
Uploads     Help and Support	$\nabla$	$\nabla$	$\nabla$	$\nabla$	$\nabla$	$\nabla$	∽ <sup>trg</sup>
	20-208	Testbefragung_006	Closed		March 3, 2020 11:41 AM	a few seconds	trg-SupplyOn AG (TRAINING CC
	20-225	Questions dependent on BD questions 2	Closed		March 6, 2020 4:21 PM	a few seconds	trg-SupplyOn AG (TRAINING CC
	20-217	Testbefragung_012	Closed		March 9, 2020 1:04 PM	a few seconds	trg-SupplyOn AG (TRAINING CC

Figure 51 - Open Survey Monitoring

The Monitoring shows two charts: On the left, the Response Status **1** is displayed and on the right the Invitation E-Mail Delivery Status **2**.

Response Status: The diagram distinguishes between:



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 **3**.

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







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 **3**.

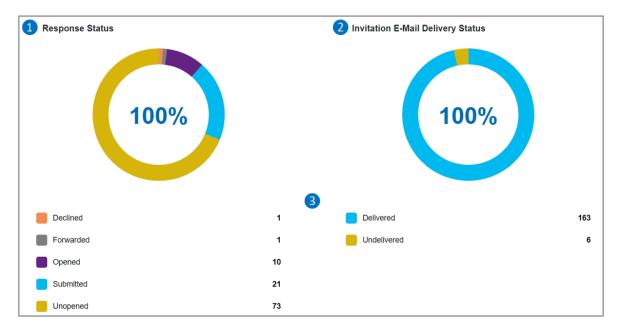


Figure 52 - Description Survey Monitoring

## 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 1.

Secondly, you can select one survey in the Survey Library with the checkbox **2** and download the report with the report with the report button**3**.

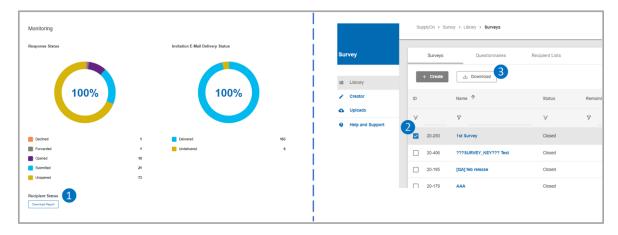


Figure 53 - Download Survey Report



#### **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, email 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)

ļ	A	В	С	D	E	F	G	н	1	1	K
	Survey Title	Supplier Qualification									
!	Survey Description	Standard Supplier Qua	ification Survey								
	Survey Start (UTC)	2020-10-26T16:30:00Z									
4	Survey End (UTC)	2020-11-06T23:45:00Z									
5											
	Recipient List	Training Companies									
7											
	SPIN ID •		DUNS	<ul> <li>Company Name</li> </ul>	<ul> <li>City</li> </ul>	<ul> <li>Country</li> </ul>	<ul> <li>Contact Person</li> </ul>	SMA-ID	<ul> <li>Invited as</li> </ul>	* Email Address *	Email Status
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D		GB	Pinpin Qu	SMA0000N6DMJ	regular user	demo-scenario@supp	
	2026743		999022001	trg-SEC Tools Ltd. (C		GB	Christian Poetzel	SMA0000N9DL3	regular user	demo-scenario@supp	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D		GB	Paula Morgan	SMA000016YCL	regular user	demo-scenario@supp	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D		GB	Peng Yuan	SMA0000N84L2	regular user	demo-scenario@supp	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D		GB	Julia Nash	SMA000013TR6	regular user	demo-scenario@supp	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D		GB	Yizhou Yang	SMA0000N5QA2	regular user	demo-scenario@suppl	
	2026743		999022001	trg-SEC Tools Ltd. (D		GB	Xin Lu	SMA0000N8IPP	regular user	demo-scenario@suppl	
	2026743		999022001	trg-SEC Tools Ltd. (D		GB	Mark Meier	SMA000014EQO	regular user	demo-scenario@supp	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D	EN Cambridge	GB	Jeff Huang	SMA0000N90MA	regular user	demo-scenario@supp	SENT
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D		GB	Xiaowei Zhang	SMA0000N6JVH	regular user	demo-scenario@supp	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D	EN Cambridge	GB	Kate Bacon	SMA000013TR3	regular user	demo-scenario@suppl	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D	EN Cambridge	GB	Julia Nash2	SMA0000N5Z01	regular user	demo-scenario@suppl	SENT
	2026743		999022001	trg-SEC Tools Ltd. (C		GB	Jiakun Xia	SMA0000N5V51	regular user	demo-scenario@supp	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D		GB	Lisa-Marie White	SMA0000N7FU4	regular user	demo-scenario@supp	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D		GB	Florian Meyer	SMA0000N90WR	regular user	demo-scenario@supp	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D		GB	Tim Adams	SMA0000N8UPT	regular user	demo-scenario@supp	
	2026743		999022001	trg-SEC Tools Ltd. (D		GB	Joachim Holzapfel_IT	SMA0000N2DBH	regular user	demo-scenario@supp	
	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D		GB	Xueshuang Zhao	SMA0000N8HHC	regular user	demo-scenario@suppl	
7	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D	EN Cambridge	GB	John Adams	SMA000013TR0	regular user	demo-scenario@suppl	
8	2026743	05689123D	999022001	trg-SEC Tools Ltd. (D	EN Cambridge	GB	Jerzy Wachowiak	SMA0000N4EC3	regular user	jerzy.wachowiak@sup	SENT

Figure 54 - Survey Overview Report



#### Remind:

- 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).

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.

#### Meaning of different E-Mail Delivery Status:

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	В	С	D	E	F	G	H	1	J	к	L	M
SPIN ID	Supplier ID	DUNS	Company Name	City	Country	Response Status	Response Time	Decline Reasc	DUNS Numbe	Company na	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 Ov	verview Company S	tatus Forwarded In	vitations Answers	(+)		·	·					

#### 1.2.6.2.3 Forwarded Invitations

Open the tab "Forwarded Invitations" **1** to see which recipient forwarded the participation to the survey.

You can see to which company the person forwarding the survey belongs 2.

You can also clearly identify the person who forwarded the survey by looking at the "ContactPerson", "SMAID", "EmailAddress" and "Forwarded from" columns **3**.

You can see in column H to K whether the forwarding worked ("EmailStatus", "EmailDate", "ResponseStatus", "ResponseDate") 4

#### Possible "EmailStatus":

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

Possible "ResponseStatus":

#### 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.

	6				3				(4)			5
Α	в	с	D	E	F	G	н	1	J	К	L	М
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			
		1										
->	Survey Ov	erview Forwarded	Invitations Ans	swers	+				I (			

Figure 55 - Forwarded Invitations



#### 1.2.6.2.4 Answers

The third tab shows the "Answers" of the survey 1.

**Company Data + Survey Respondent Data 2:** 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 3.
- In column L and M, the response to a free text field is shown as an example (Single Text Field and Comment Field)
- In column N a link is displayed, which is generated when a "File" question is answered 5.
   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".

A	В	С	D	E	F	G	Н	1	L L L	Jк	3ι	4 M	N	<b>5</b> o
SPIN ID	Supplier ID	DUNS	Company N		Country	Contact Per	rsc SMA-ID	Invited as	Email Addres		•			
						-				Are you a	GeAre yo	u a Remark	If yes, please atta	ch it. Did you
										No: No		TestRemark	1 https://platform.pro	d.siriu No: No
											fulfill			
											require	m		
										Yes: Yes	ents: al	ble Any Remark	https://platform.pro	d.siriu No: No
					-									
					1									

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 <u>"Add Recipient List to Active Survey"</u>) 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 <u>Survey Report</u> 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" **1**. A window will open where you can paste the copied email address **2**. Check the pasted email address **3**. If it was



successfully, you finally can click on "Resend Invitation" **4**. If the email address is not approved this email address was not invited the first time.

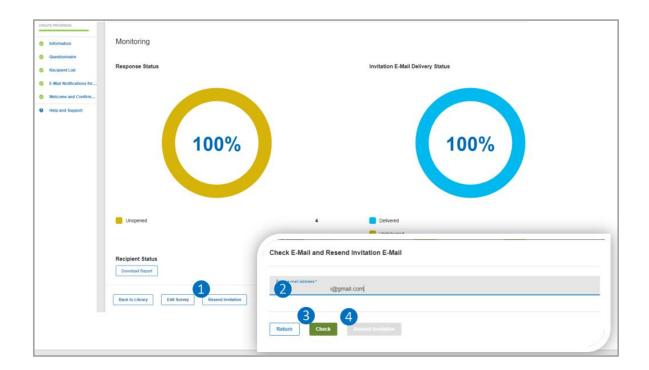


Figure 57 - Resend Survey Invitation

## 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" 1 to add a reminder. You can then select a date on which the reminder

should be sent from the date picker **2**. Click on the trash can to delete the reminder **3**. It is possible to set a total of 10 reminders.

1. Notification Date	< Aug 2020 > C
	Mo Tu We Th Fr Sa Su
	1 2
- Add Notification	3 4 5 6 7 8 9 r
	10 11 12 13 14 15 16
	17 18 19 20 21 22 23
	24 25 26 27 28 29 30 C
	31

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.

#### <u>Survey</u>

- 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 <u>1.2.3.1.1 Select connected recipients).</u>
- 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.
- o 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



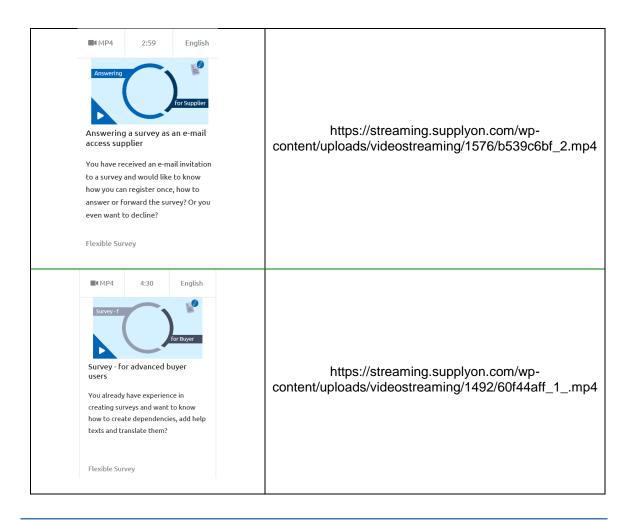
- several employees are working on the same project and want to see the results of the survey
- to provide full transparency and access to the data in case of substitution (e.g. illness, employee change, maternity leave).
- If you identify this network error during survey creation and are afraid of losing all the data that you inserted copy the URL and insert it in another tab. Afterwards, click on save.

	SupplyOn > Survey > Library > Ques D- MY QUESTION TYPES	
Survey		Network Error X
	<ul> <li>Text Input</li> </ul>	page8 💙 <sup>4</sup> sge3 o page4 o page5 o page6 o page7 o page8 o page7 o page7 o page7 o Add New Page +
E Library	Checkbox	
Creator	t Radiogroup	65. Account Holder *
Uploads	Dropdown	
Help and Support	Switch	
Help and support	File	
	Business Directory	
	H Headline	66. Bank Control Key

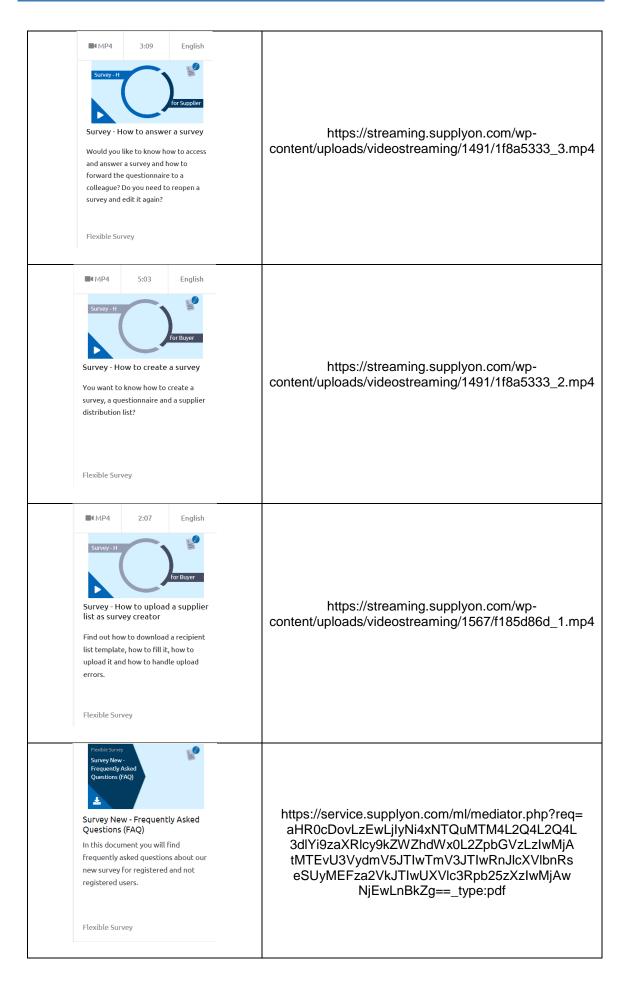
Figure 59 - Network error problem solution

## 1.2.10 Training Videos

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









# 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.