Tips for Improving the User Experience

Rob Stevenson
May 2012
SAP Sourcing / CLM 2012 Webcast Series

Goal
• Spread the knowledge about SAP Sourcing
• Educate users and consultants on Best Practices
• Build and leverage the SAP Sourcing community

Audience
• SAP Consulting and Field Services
• Partner Consulting
• SAP Sourcing Customers

Upcoming Topics
• June – Using Projects
First Impressions
### Welcome to SAP Sourcing

Welcome to SAP Sourcing! We are excited to see you use the tool. Here are some tips to help you get started.

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**What if I need immediate assistance?** Our support center is prepared to help you. You may call them at 555-555-1212 or email them at support@acmesupport.com.

### Master Agreement List Channel

Search Master Agreements

<table>
<thead>
<tr>
<th>Master Agreement ID</th>
<th>Master Agreement Name</th>
<th>Supplier Name</th>
<th>Status</th>
<th>Effective Date</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000000001</td>
<td>MSA - SAP Sourcing</td>
<td>Vendor 1</td>
<td>Executed Agreement</td>
<td>1/1/10</td>
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</tr>
<tr>
<td>MA-001-2011</td>
<td>R51</td>
<td>Vendor 1</td>
<td>On Hold</td>
<td>6/24/11</td>
<td>6/24/13</td>
</tr>
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<td>Vendor 1</td>
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<td>2/23/12</td>
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<tr>
<td>MA-002-2011</td>
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<tr>
<td>MA-005-2011</td>
<td>R5 Everything</td>
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Toolbar items only visible if they are needed

- System Property to Remove Quick Create
- Security Profile to Remove Reference Guide
- Security Profiles / Toolbar Customizations to Remove Navigation Buttons
Create a Welcome Channel

- Example: Create a Google Document with Content
- Create an iFrame referencing the Google Document
- Create a Desktop Channel using the iFrame
- Add the Desktop Channel to the Workbench Page
- Another Example: Could also use a Wiki page
Utilize List Channel to Provide Immediate Navigation

- If a user is only using CLM, show the user their contracts
- Add the appropriate List Channel to the Workbench Page
- Show only the important columns (through personalization or a custom query)

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Utilize a Welcome Message

- Message is shown when users login (only shown once)
- Great way to share an important update and message to the users
- Welcome Messages are configured in the Company object

Message: We are excited to share with you some updates to our Strategic Sourcing program. We have just launched the SAP Sourcing Projects functionality. Projects will allow us to...

- Utilize standard methodologies and ensure consistency in our processes
- Track and share progress with all levels of management, in real time (No more Excel sheets!!!)
- Manage workload to ensure that everyone is sharing equally in our assignments

We know that change is never easy, so we are scheduling upcoming Q&A sessions to go over the use of this exciting new capability.
Simplify the Supplier Workbench Page

- Consider a single channel to show active events only
- Utilize Security Profiles / Toolbar Customizations to limit navigation buttons
Lead the User
Simplify the Choices for the Users

- Consider using Document Types or Document Templates, but not both
- Remove unnecessary queries
- Provide **ONE** way for the user to accomplish a task
Simply Business Documents

- Only use the necessary tabs – Document Type configuration
- Only use the necessary fields – WYSIWYG / Page Customizations
Help the User
Provide *guidance* text for important points

- Tooltips can include descriptive information
- Text can be added next to a field for additional instructions
- Accomplished with WYSIWYG / Page Customizations
Utilize Supplier Invitation Attachment on RFx

- Provide instructions for accessing Sourcing (how to get login)
- Provide guidelines and instructions for responding to the RFx
Advanced
Implement Single Sign On

- Avoid users having to remember another user id and password
Summary

1. Create a great first impression with a **simple buyer workbench**
2. Minimize supplier confusion with a **simple supplier workbench**
3. Create security profiles that **only enable the needed functionality**
4. Regularly create welcome pages to **provide tips and announce changes**
5. Use only templates or types, but not both to **provide one path for the users**
6. Hide unnecessary tabs and fields to ensure **only important data is visible**
7. Provide prescriptive help text to **ensure proper use of important data fields**
8. Use toolbar customizations to **hide unused functionality**
9. Implement single-sign-on to **remove the need for a password**
10. Utilize the supplier invitation attachment to **provide instructions to suppliers**
**Bonus Tips**

1. Remove unused reports from the reports page
2. Load only the require master data (e.g., only the currencies that will be used)
3. Distinguish production, staging, and development systems by using themes
4. Develop custom queries to provide only meaningful data to users
5. Develop custom scripts to generate important messages
6. ...
7. ...
8. ...
9. ...
10. ...
Thank You!

Contact information:

Rob Stevenson
Director, SAP Sourcing / CLM Center of Excellence
robert.stevenson@sap.com