SAP Ariba /\\\

Feature at a Glance
Excel Self-Service Extensibility - Framework

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Target GA: August 2022

PUBLIC

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Feature at a Glance

Introducing: **Excel Self-Service Extensibility - Framework**

Customer challenge

Current Customization app for Ariba Network only works for old framework screens (PO/ Ship Notice /Invoice) and CSV format. It does not support Excel format. This Customization tool is internal only and not very friendly.

Meet that challenge with
SAP Ariba

This feature enables buyer administrators to create a customization project for the Excel spreadsheet template that is used by the Ship Notice job type for Upload/Download.
Besides the pre-defined list of values, customers will be able to add extra custom PO fields to the Excel template by using the new Self-Service Customization framework. Fields can also be renamed and re-arranged.

Experience key benefits

- Enhances Extensibility of the Solution
- Improved Collaboration between Buyers and their Trading Partners

Solution area

Ariba Network, buyers and suppliers

Implementation information

Customer Configured

Prerequisites and Restrictions

•To create a customization project, you must be a buyer administrator or a buyer with the **Customization Editor** permission.
•To assign your customization project to a supplier group, that supplier group must already exist in your account..
•To publish a customization project, you must be a buyer administrator or a buyer with the **Customization Publisher** permission.

Feature at a Glance

Introducing: **Excel Self-Service Extensibility - Framework**

This feature enables buyer administrators to create a customization project for the **Ship Notice** Excel template that is used by the **Upload/Download** feature.

Suppliers and supplier groups who are assigned this customization project see the customized Excel spreadsheet, rather than the standard template, when they run and download a **Ship Notice** job.

Feature at a Glance

Introducing: **Excel Self-Service Extensibility - Framework / Buyer UI Changes**

This feature adds the **Ship Notice** Excel template to the document-type choices of customization projects that a buyer administrator can create with the **Customization – Self Service** feature. A buyer administrator can choose this document type to revise and enhance the standard **Ship Notice** template for **Upload/Download**.

A customization project for the **Ship Notice** template might include the following changes to the standard Excel spreadsheet template :

- Rearrange the order of columns.

- Create custom attributes to define new columns.

- Add columns from existing custom attributes for ship notices.

- Edit custom attributes to display a different column name, including translations.

Feature at a Glance

Introducing: **Customization projects for Upload/Download templates**

Buyers can edit, assign to suppliers, test, and publish their customization project.

A customization project for an **Upload/Download** template in Excel contains one or more customizations. These customizations help buyers obtain better requirements compliance and reduce unnecessary communications with their suppliers.

Column properties are customized by editing the corresponding attribute in the customization project. The following are some customizations that buyers can make to an **Upload/Download** template

- Choose which customer-defined columns to include or omit from the template.

- Set an alternative name for a customer-defined column.

- Change the order of the columns in the Excel template.

Feature at a Glance

Introducing: **Create a customization project for an Upload/Download template**

1. Creating a customization project is divided into two parts - editing tasks and publishing tasks:Editing tasks are done by the Editor from the buyer test account. The Editor creates or updates customization projects and tests them.

2. Publishing tasks are done by the Publisher from the buyer production account. The Publisher verifies and publishes customization projects. A buyer who is both an Editor and a Publisher can publish their own customization projects.

Feature at a Glance

Introducing: **Create a customization project for an Upload/Download template**

Buyers can define a customization project for the **Ship Notice** job type for **Upload/Download**.

Prerequisites

- You are a buyer administrator or a buyer with the **Customization Editor** permission.

- You have a buyer test account.

- If you want to assign your customization project to a supplier group, the supplier groups must already exist in your account.
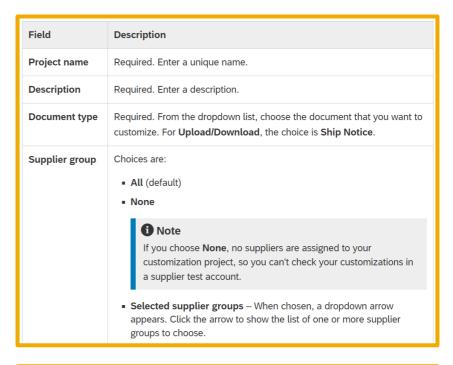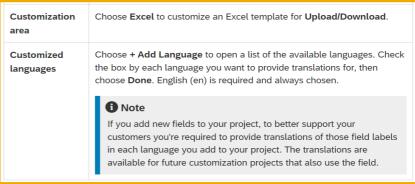
Procedure

1. Log in to your buyer test account.

2. From the **Account Settings** user icon at the top right, choose **Settings → Customization Self Service**.The **Customization Self Service** page opens.

3. Choose **Create Project** to start a new customization project. The **Create Project** page opens, showing the first step, **What project do you want to create?**

Feature at a Glance
Introducing: **Create a customization project for an Upload/Download template**

4. Enter your customization project information in the following fields, then choose **Save**, or choose **Next** to save and go to the second step.

After you choose **Save**, the **Customization Self Service** page opens to the **Projects** tab, showing your project in the list of customization projects.

Field	Description
Project name	Required. Enter a unique name.
Description	Required. Enter a description.
Document type	Required. From the dropdown list, choose the document that you want to customize. For **Upload/Download**, the choice is **Ship Notice**.
Supplier group	Choices are: ■ **All** (default) ■ **None** ⓘ **Note** If you choose **None**, no suppliers are assigned to your customization project, so you can't check your customizations in a supplier test account. ■ **Selected supplier groups** – When chosen, a dropdown arrow appears. Click the arrow to show the list of one or more supplier groups to choose.

Customization area	Choose **Excel** to customize an Excel template for **Upload/Download**.
Customized languages	Choose **+ Add Language** to open a list of the available languages. Check the box by each language you want to provide translations for, then choose **Done**. English (en) is required and always chosen. ⓘ **Note** If you add new fields to your project, to better support your customers you're required to provide translations of those field labels in each language you add to your project. The translations are available for future customization projects that also use the field.

Feature at a Glance
Introducing: Create a customization project for an Upload/Download template

5. In the row for your customization project, choose the more icon in the **Actions** column, then from the dropdown choose **Edit**.The **Edit Project** page opens with the second step, **How do you want to customize your project?**, expanded and active.

6. Customize the desired existing and new attributes in your project.

7. When finished customizing attributes, click **Next**.The page expands and makes active the third step, **What will your project look like?**.

8. Review the preview of your customization project applied to the **Upload/Download** Excel template.

9. If you need to revise any attributes, edit your project.

Feature at a Glance

Introducing: How to create and add custom attributes to a customization project for an **Upload/Download** template

Prerequisites

- You are a buyer administrator or a buyer with the **Customization Editor** permission.
- You have a buyer test account.
- Your customization project is not in the **Requested to publish** or **Published** state.

Context

You can create a custom attribute to a customization project. The attribute adds to the desired **Upload/Download** templalte a field for information that is not already included in the standard template.

Custom attributes can be used in more than one customization project. Custom attributes are stored in an attributes library, to use in future customization projects that the attribute supports. The attributes llibrary is available for use by all Editors in the same buyer organization.

Attributes for new fields in a document type are referred to as extrinsics. Extrinsic fields add additional information to the document. Attributes for existing fields in the document type are referred to as intrinsics, meaning they're intrinsic to the document.

> ⚠ **Restriction**
>
> New fields cannot include sensitive personal data (for example, Social Security numbers) or personal data (for example, phone numbers). A new field is not set up with appropriate data protection measures for personal information.

Feature at a Glance

Introducing: How to create and add custom attributes to a customization project for an **Upload/Download** template

Procedure

1. Log in to your buyer test account.

2. From the **Account Settings** user icon at the top right, go to the **Settings** → **Customization Self Service** page, choose the **Attributes** tab, then choose **Create Attribute** to open the **Create Attribute** page.
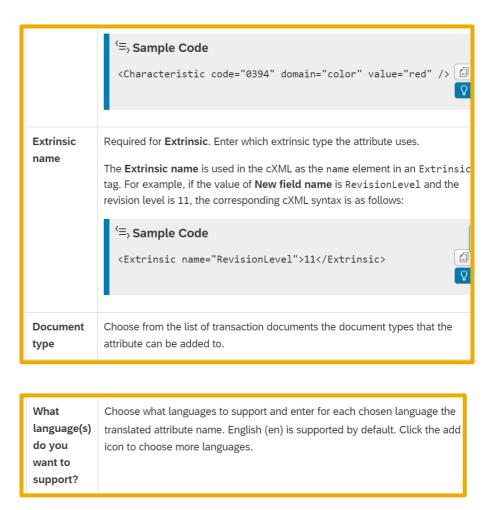
> ℹ️ **Note**
>
> Alternatively, if you're on the **Edit Project** page, choose the **Create** button in the second section, **How do you want to customize your project?**, to open the **Create Attribute** page.

Feature at a Glance

Introducing: How to create and add custom attributes to a customization project for an **Upload/Download** template

3. Enter information to define the new attribute

Field	Description
Attribute name	Required. Enter the display name for the attribute.
Attribute description	Required. Enter an explanation of what the attribute does.
Attribute type	Required. Choose **Extrinsic** or **Characteristic**. After you choose the type, one more additional fields display.
Data type	Choose **String**.
Level	Required for **Extrinsic**. Choose **Header** or **Line item**.
Domain	Required for **Characteristic**. A characterstic defines a quality that distinguishes an item from another similar item, such as its color or size. The **Domain** field corresponds to the domain attribute of the Characteristic element in cXML. The corresponding cXML syntax is as follows:

	⌯ **Sample Code** `<Characteristic code="0394" domain="color" value="red" />`
Extrinsic name	Required for **Extrinsic**. Enter which extrinsic type the attribute uses. The **Extrinsic name** is used in the cXML as the name element in an Extrinsic tag. For example, if the value of **New field name** is RevisionLevel and the revision level is 11, the corresponding cXML syntax is as follows: ⌯ **Sample Code** `<Extrinsic name="RevisionLevel">11</Extrinsic>`
Document type	Choose from the list of transaction documents the document types that the attribute can be added to.

What language(s) do you want to support?	Choose what languages to support and enter for each chosen language the translated attribute name. English (en) is supported by default. Click the add icon to choose more languages.

Feature at a Glance

Introducing: **How to create and add custom attributes to a customization project for an Upload/Download template**

4. Choose **Save** at the top of the page.

5. Open for editing the customization project you want to add the custom attribute to.

6. In the **Available Attributes** column, click the add icon next to the custom attribute to add to your project.The attribute is added to the end of the **Selected Attributes** list.

7. In the second section of the **Edit Project** page, click **Next** to refresh the template preview in the third section.The template preview section shows the Excel template design with the new attributes.

8. If you are ready to test your completed project, click the **Push to test** button in the upper right corner of the page.

> **ℹ Note**
>
> The **Push to test** button on the **Create Project** page is only available while a customization project is being created. After a project is saved, you use other ways to push the customization project to test. For details, see How to test a customization project for an Upload/Download template.

Feature at a Glance

Introducing: **How to edit custom attributes in a customization project for an Upload/Download template**

Prerequisites
- You are a buyer administrator or a buyer with the **Customization Editor** permission.
- You have a buyer test account.
- The customization project is not in the **Requested to publish** or **Published** state.

Feature at a Glance

Introducing: **How to edit custom attributes in a customization project for an Upload/Download template**

Procedure

1. Log in to your buyer test account.
2. From the **Account Settings** user icon at the top right, choose **Settings** → **Customization Self Service**.The **Customization Self Service** page opens.
3. In the **Actions** column, click the more icon for the desired customization project and choose **Edit**.The customization project opens for editing.
4. In the step **How do you want to customize your project?**, click the edit icon in the upper right corner of the section.The section expands to show the attributes that you can customize.
5. In the **Selected attributes** list, find a custom attribute for the Excel template column that you want to customize.
6. Choose your next step.
   - To edit the attribute's properties, hover over the attribute, then click the edit icon when it appears. Proceed to Step 7.
   - To remove the corresponding column from the Excel template, uncheck the attribute checkbox. Then choose another attribute to edit, or skip to Step 9 to save your project changes.

Feature at a Glance

Introducing: **How to edit custom attributes in a customization project for an Upload/Download template**

7. **Optional:** If you want to change the default label, enter in the **Edit custom attribute** popup the column name to use instead.

    - Click the **Alternative label and translation** dropdown arrow to show the supported languages, and enter the English name to use.

    - If the attribute supports other languages, enter the desired translations in the field for each supported language.

8. **Optional:** If desired, enable the option **Include custom attribute in resulting cXML document**.This option includes the custom attribute in the ship notice cXML document that is generated when a supplier uploads the Excel template. If a supplier changes the default value of this custom attribute in an uploaded template, that value is included in the generated cXML ship notice document.

9. Choose **Save**.The modified attribute shows a blue dot to indicate that it is customized.

10. **Optional:** Change the display order of columns.In the **Selected attributes** list, click the drag icon of an attribute you want to move, then drag and drop the attribute to the desired place in the list.

11. When you finish making your customizations, click **Next**.The third section of the **Edit Project** page refreshes the template preview of your template customizations.

Feature at a Glance

Introducing: **How to edit custom attributes in a customization project for an Upload/Download template**

12. Review the template preview to verify that the template shows the desired result.If needed, repeat these steps to edit other attributes in the customization project.
13. If desired, add new attributes.
14. When you finish making customizations, test the customization project.

Feature at a Glance
Introducing: **How to delete a custom attribute**

Context

If you create a custom attribute for a customization project and later decide that you don't need that attribute, you can delete the custom attribute from an unfinished customization project..

Procedure

1. Go to the **Account Settings Settings Customization Self Service** page.
2. Click the **Attributes** tab to display the list of custom attributes.
3. In the **Actions** column, click the more icon for the custom attribute you want to delete, and choose **View** to open that attribute.
4. In the **Edit Attribute** page, click **Delete** to remove the attribute from the attributes library.

⚠ **Restriction**

You cannot delete from the attributes library a custom attribute that is used by a customization project in the **Published** or **Requested to publish** state. The customization feature instead shows a popup error message that includes the names of the customization projects that use the attribute and are in the **Published** or **Requested to publish** state.

⚠ **Caution**

You cannot restore a deleted custom attribute.

Feature at a Glance

Introducing: **How to test a customization project for an Upload/Download template**

Prerequisites

- You are a buyer administrator or a buyer with the **Customization Editor** permission.

- The customizations in your project are finished and saved,

- The customization project has at least one assigned supplier

> **ⓘ Note**
>
> If your customization project has no assigned suppliers, add a supplier **before** you push the project to test. The project must have at least one supplier, for you and the Publisher to be able to test the customization.

Feature at a Glance

Introducing: **How to test a customization project for an Upload/Download template**

1. **Procedure**

Push your customization project to test in one of the following ways:

a) If you have not yet saved your project and are still on the **Create Project** page, click the **Push to test** button in the upper right corner of the page.

b) If you are on the **Edit Project** page, click the **Push to test** button in the upper right corner of the page.

c) From the **Account Settings → Settings → Customization Self Service** page, go to the **Actions** column, click the more icon for your customization project, and choose **Push to test** from the dropdown.

The customization project is added to or removed from suppliers, depending on which **Suppliers** option you chose when defining the customization project:

- **All** – The customization project is applied to all suppliers.

- **None** – The customization project is not applied to any suppliers

- **Selected supplier groups** – The customization project is added to the suppliers in each chosen supplier group, and removed from all other suppliers

Feature at a Glance

Introducing: **How to test a customization project for an Upload/Download template**

1. Check your customizations

    a) Log in to a supplier test account that you've assigned the customization project to.

    b) Go to **Quick links** → **Upload/Download** → **Jobs** and click **Create**.The **Create/Edit Job** popup opens.

    c) Create a job, run the job, and download the generated Excel template.

    d) When you generate the customized **Upload/Download** job template, the new fields show as columns in the Excel spreadsheet.

    e) Open the Excel template download and confirm that your customizations are correct.If you need to make changes, return to your buyer test account, make the needed revisions, push the customization project to supplier test, and go to your supplier test account to review and test the revised project.

2. Return to your buyer test account, then choose **Account Settings** → **Settings** → **Customization Self Service**.

3. The **Customization Self Service** page opens.

4. Request publication of your customization project

5. Choose OK

> ⚠ **Caution**
>
> After a customization project is put in the **Requested to publish** or **Published** state, you can no longer edit it.

Feature at a Glance

Introducing: **How to publish a customization project for an Upload/Download template**

Prerequisites

You are a buyer administrator or a buyer with the **Customization Publisher** permission.

Context

As a Publisher for customization projects, you can verify and publish customization projects created by you and by others.

Procedure

1. Validate the customization project.
   a) Log in to your supplier test account.
   b) Go to **Quick links** → **Upload/Download** → **Jobs** and choose **Create**.
2. The **Create/Edit Job** popup opens.
   a) Create a job for the customized **Upload/Download** job type, run the job, and download the generated Excel template.
   b) Open the Excel template and confirm that the customizations are set up correctly.
3. Log in to your buyer account.

⚠ **Restriction**

A customization project can no longer be edited after it's published.

Feature at a Glance

Introducing: **How to publish a customization project for an Upload/Download template**

1. From the **Account Settings** user icon at the top right, go to **Settings → Customization Self Service**.

2. In the **Actions** column, click the more icon for the customization project to publish, then choose **View and edit details** from the dropdown.

3. The **Edit project** page opens.

4. When you're satisfied that the customization project is ready to publish, submit it for publication.

   a) Return to the **Account Settings → Settings → Customization Self Service** page.

   b) In the **Actions** column, click the more icon for the customization project to publish, then choose **Publish** from the dropdown.

5. The **Publish to production** popup opens.

   a) In the popup, choose **OK**.

The customization project is published and becomes available for use on the document types the project supports.

Results

The customization project is applied when an assigned supplier creates an **Upload/Download** Excel template for the job type chosen in the customization project. The Excel template that the supplier downloads shows the modifications to the standard template that are specified by the customization project.

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