Feature at a Glance

Custom attributes for orders

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Target GA: August, 2022

PUBLIC

THE BEST RUN

Ease of implementation High Touch
Geographic relevance Global

Feature at a Glance

Introducing: Custom attributes for orders

Customer challenge

In the purchase order, customers send information relevant for their collaboration processes. However, this information is not always part of the standard fields shown in the different Ariba Network pages (document details, WB list pages, Excel upload pages, reports).

If it's not a commonly used field, adding it to the standard requires a lot of effort, and it could have a significant performance impact.

Meet that challenge with SAP Ariba

Buyers can now easily create custom attributes that allow them to communicate to supplier, in the purchase order, information that is relevant for their collaboration process, but that is not part of the Ariba standard.

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

- You are a buyer administrator or a buyer with the **Customization Editor** permission.
- The supplier groups that you want to assign your customization project to already exist in your account.
- To publish a customization project, you must be a buyer administrator or a buyer with the **Customization Publisher** permission.
- You can create a **maximum of thirty custom attributes** to use across all document types

Feature at a Glance

Introducing: **Custom attributes for orders**

Allow buyer administrators to create custom attributes. These fields will be available to both buyer and supplier users as follows:

- As columns in list pages
- As search filters in list pages (phase 1: PO, ITC, ITS)
- In excel download jobs (phase 1: ASN)

For each attribute, the customer can define:

- Basic properties: name, description, size, data type.
- Mapping to the cXML fields (characteristic, extrinsic)

Feature at a Glance

Introducing: **Custom attributes for orders / buyer UI changes**

This feature adds custom attributes for order confirmations, purchase orders, and ship notices. It also adds customization projects for these three document types as shown in the following table.

Document type	Excel template for Upload/Download	Workbench tile
Order confirmation		**Items to Confirm**
Purchase order		**Orders**
Ship notice	**Ship Notice**	**Items to Ship**

Feature at a Glance

Introducing: **Custom attributes for orders**

Custom attributes

You can create custom attributes to improve collaboration between buyers and suppliers for purchase orders, ship notices, and order confirmations.

Custom attributes help buyers communicate information with their suppliers that is not already included on standard Ariba Network pages, **Upload/Download** job types, and **Workbench** tiles.

For example, you can create <*Size*> and <*Color*> custom attributes, and then create a customization project for the **Items to Ship** tile for the **Workbench** that includes these attributes.

Applying these custom attributes to the **Items to Ship** tile for the **Workbench** lets the supplier view this information on the list page and also filter ship notices by these custom attributes.

Feature at a Glance

Introducing: **How to create an attribute**

Buyers can create custom attributes and add them to a centralized library of attributes.

Prerequisites

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

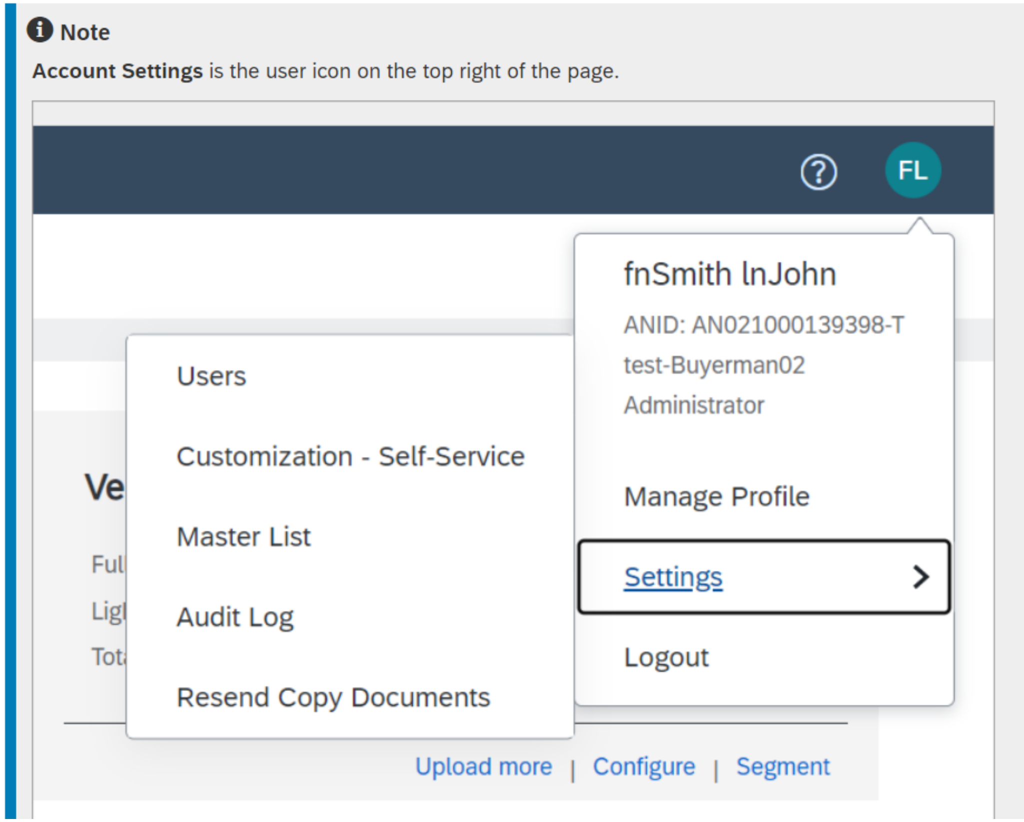
Restriction

You can create a maximum of thirty custom attributes to use across all document types.

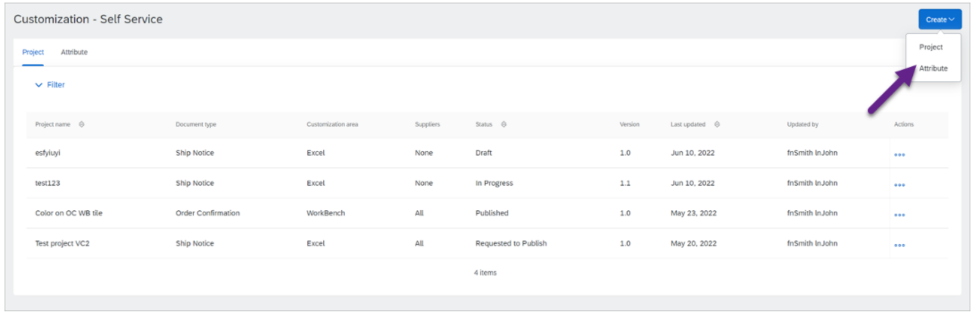
Feature at a Glance

Introducing: **How to create an attribute**

1. Click **Account Settings > Settings > Customization Self Service**.



2. Click on the **Create** pulldown menu and select **Attribute**.



Feature at a Glance

Introducing: **How to create an attribute**

3. Fill in the attribute fields.

Field	Description
Attribute name	Enter the display name for the attribute.
Attribute description	Enter a description for the attribute.
Attribute type	Choose **Extrinsic** or **Characteristic**.
Data type	Choose **String**.
Level	(Extrinsic only) Choose **Header** or **Line item** depending on whether the custom attribute is a header or a line-item extrinsic.
Domain	(Characteristic only) Enter the name of the `domain` attribute of the `Characteristic` element in the cXML.
Extrinsic name	(Extrinsic only) Enter the name of the extrinsic used in the cXML.
Document type	The **Purchase order** document type is always selected. You can also select one or both of the other document types. By selecting a document type, you indicate that the attribute can be used in a customization project for this type of document. Ariba Network automatically builds and displays the cXML paths. For example, if you create an attribute that is a line-item level extrinsic, and you select all three document types, Ariba Network displays the following cXML paths: ▪ Order confirmation: ConfirmationRequest/ConfirmationItem/Extrinsic ▪ Purchase order: OrderRequest/ItemOut/ItemDetail/Extrinsic ▪ Ship notice: ShipNoticeRequest/ShipNoticePortion/ShipNoticeItem/Extrinsic
What language(s) do you want to support?	Choose what languages to support, and enter the attribute name for each chosen language. English (en) is supported by default. Click the add ⊞ icon to choose more languages.

4. Click **Save**.

The attribute is saved, and the attribute library page displays.

Feature at a Glance

Introducing: **Customization projects**

Customization projects

You can create customization projects to add custom attributes to the **Ship Notice** Excel template for **Upload/Download**. You can also create customization projects to add custom attributes to the **Workbench** tiles for **Items to Confirm**, **Orders**, and **Items to Ship**.

Prerequisites

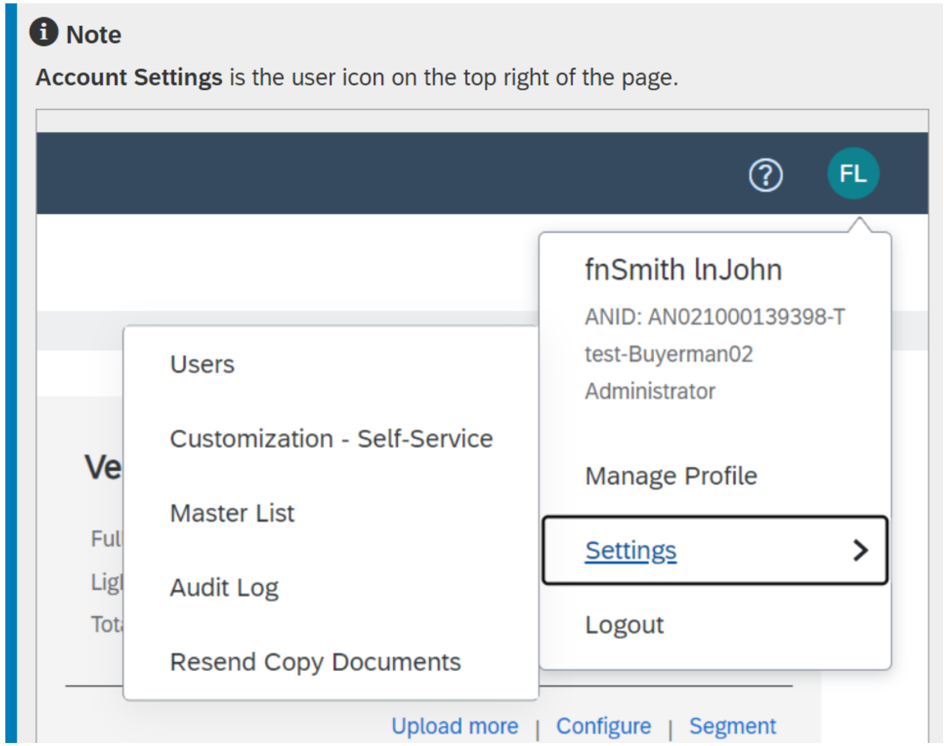
You are a buyer administrator or a buyer with the **Customization Editor** permission.

The supplier groups that you want to assign your customization project to already exist in your account.

Feature at a Glance

Introducing: **Customization projects - procedure**

1. Log into your **Buyer Account**
2. Click **Account Settings → Settings → Customization Self Service**
3. Choose **Create Project** to create a new customization project. The **Create Project** page opens, showing the first step, **What project do you want to create?**
4. Enter your information in the customization project fields. The following fields are required.



Feature at a Glance

Introducing: **Customization projects - procedure**

5. Choose **Save**.
   - The **Customization Self Service** page opens in the **Projects** tab, showing your project in the list of customization projects.
6. 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.

Field	Description
Project name	Enter a unique name.
Project description	Enter a description.
Document type	Choose **Order confirmation**, **Purchase order**, **Quality notification**, or **Ship notice**.
Suppliers	Choices are: ▪ **All** (default) ▪ **None** **Note** If you choose **None**, you will not be able to check your customizations in the supplier test account since the customization project will not be assigned to any suppliers. ▪ **Selected supplier groups** – When chosen, a dropdown arrow shows. Click the arrow to show the list of supplier groups.
Customization area	Choose **Workbench/Items to Confirm**, **Workbench/Orders**, or **Workbench/Items to Ship** to customize the **Workbench** tile for the selected **Document type**. Or, for the **Ship Notice Document type** only, choose **Excel** to customize the **Ship Notice Upload/Download** Excel template.
Customized languages	English (en) is required and always chosen. To add other languages, click the add (+) icon to choose the languages. Click **Done** when you finish selecting languages.

Feature at a Glance

Introducing: **Customization projects - procedure**

7. Make your customizations.For details about customizing quality notifications, see How to create a customization project for quality notifications in the documentation
    - For details about customizing **Workbench** tiles, see **How to customize a Workbench tile.**
    - For details about customizing the **Ship Notice** Excel template for **Upload/Download**, see details in feature CSC-21145: Customized Ship Notice template for Upload/Download.
8. When you finish making your customizations, click **Save**.The **Customization Self Service** page displays.
9. In the row for your customization project, choose the more icon in the **Actions** column, then from the dropdown choose **Push to test**.The **Push project to supplier test account** popup displays.

Feature at a Glance

Introducing: **Customization projects - procedure**

10. Choose **Push**.The customization project is pushed to the supplier test account. The project **Status** changes to **Pushed to Test**.
11. **Optional:** Assign the project to suppliers for testing. This step is only needed when no suppliers have been assigned to the project.
    - In the row for your customization project, choose the more icon in the **Actions** column, then from the dropdown choose **Edit**.
    - Click the edit icon in the **What project do you want to create?** section.
    - Select the suppliers.
    - Click **Save**.
12. Log in to a supplier test account you have assigned the customization project to, and check your customizations.
13. Return to your buyer test account and click **Account Settings** → **Settings** → **Customization Self Service**.The **Customization Self Service** page opens.

Feature at a Glance

Introducing: **How to publish a customization project**

Procedure

1. Validate the customization project by logging on to your supplier test account and checking your customizations.

   > **Note**
   >
   > If you are both the Editor and the Publisher, you can skip this step since you already validated the project.

2. Log on to your buyer production account.
3. Click **Account Settings > Settings > Customization Self Service**.

   > **Note**
   >
   > **Account Settings** is the user icon on the top right of the page.

   The **Customization Self Service** page opens.

4. **Optional:** Assign suppliers to your customization project. You can assign suppliers before or after publishing the project.

   a. Click the more (◦◦◦) icon in the **Actions** column for the customization project you want to assign suppliers to, and select **Edit**.

   The **Edit Project** page displays.

   b. Click the edit (✎) icon in the **What project do you want to create?** section.

   c. Select the suppliers.

   Choices are:

   - **All** (default)
   - **None**
   - **Selected supplier groups** – When chosen, a dropdown arrow shows. Click the arrow to show the list of supplier groups.

   d. Click **Save**.

   e. The **Suppliers** popup displays. Click **OK**.

   Your edits are saved, and the **Customization Self Service** page displays.

5. Click the more (◦◦◦) icon in the **Actions** column for the customization project you want to publish, and select **Publish**.

   The **Publish to production** popup opens. The popup reminds you that your customization project will apply to your chosen suppliers in your production account.

6. Click **OK**.

   The customization project is published. The **Status** column for the project shows **Published**.

Feature at a Glance

Introducing: Workflows for creating and publishing a customization project

The Editor creates the customization project from the buyer test account, and the Publisher publishes it from the buyer production account.

> **Restriction**
>
> The Editor can only use a test account, not a production account, to develop and test customization projects.

1. The Editor logs on to the buyer test account.
2. The Editor creates a new or edits an existing customization project to apply to suppliers when they do one of the following:
   - Create or edit a quality notification.
   - Generate a **Ship Notice Upload/Download** job template in Excel.
   - Review orders in the **Workbench** tile for **Orders**.
   - Create order confirmations in the **Workbench** tile for **Items to Confirm**.
   - Create ship notices in the **Workbench** tile for **Items to Ship**.
3. The Editor edits the customization project to add customizations.
4. The Editor pushes the customization project to the supplier test account.
5. The Editor logs on to the supplier test account and validates the customization project.
6. From the buyer test account, the Editor requests to publish the customization project to the production system.
7. The Publisher logs on to the supplier test account and validates the customization project.

   > **Note**
   >
   > When the Editor is also the Publisher, this step is skipped.

8. The Publisher logs on to the buyer production account and publishes the customization project.
9. The Publisher assigns suppliers to the customization project.

Feature at a Glance

Introducing: **How to test a customization project**

Buyers can check how an applied customization project will look before publishing it.

Prerequisites

- You are a buyer administrator or a buyer with the **Customization Editor** permission.
- You have completed steps 1 through 11 in **How to create a customization project**.

Feature at a Glance

Introducing: **How to test a customization project - procedure**

1. If you have not already done so, log in to a supplier test account that you have assigned the customization project to.
2. To test a customization project for the **Upload/Download Ship Notice** Excel template, proceed to Step 3. To test a customization project for a **Workbench** tile, proceed to Step 4.
3. Test customization to the **Upload/Download Ship Notice** Excel template.
   a) Go to **Quick links Upload/Download Jobs** and click **Create**.The **Create/Edit Job** popup opens.
   b) Create a job, run the job, and download the generated Excel template.For details, see **How to create an Upload/Download job and How to run an Upload/Download job and make data changes to upload**.
   c) When you generate the customized **Upload/Download** job template, the new fields show as columns in the Excel spreadsheet.
   d) Open the Excel template download and confirm that your customizations are correct.
4. Test customizations to a **Workbench** tile.
   a) Click **Workbench**, and then click the tile (**Items to Confirm**, **Orders**, or **Items to Ship**) you want to test. The list page for the tile displays.
   b) **Optional:** Filter the results using any of the available filters.
   c) **Optional:** Configure the display listing. You can change which columns display in the table. Click the table (icon to view the available columns and select the ones you want to display in the table.

Feature at a Glance

Introducing: **How to customize a workbench tile**

In a customization project, you can customize a **Workbench** tile to include custom attributes as columns and filters.

Prerequisites

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

Context

You can customize the following **Workbench** tiles:

- **Items to Confirm**
- **Orders**

Note

When you customize the **Orders** tile, the other tiles related to orders (**New Orders**, **Changed Orders**, **Orders to Invoice**, and **Orders with service line**) are also affected.

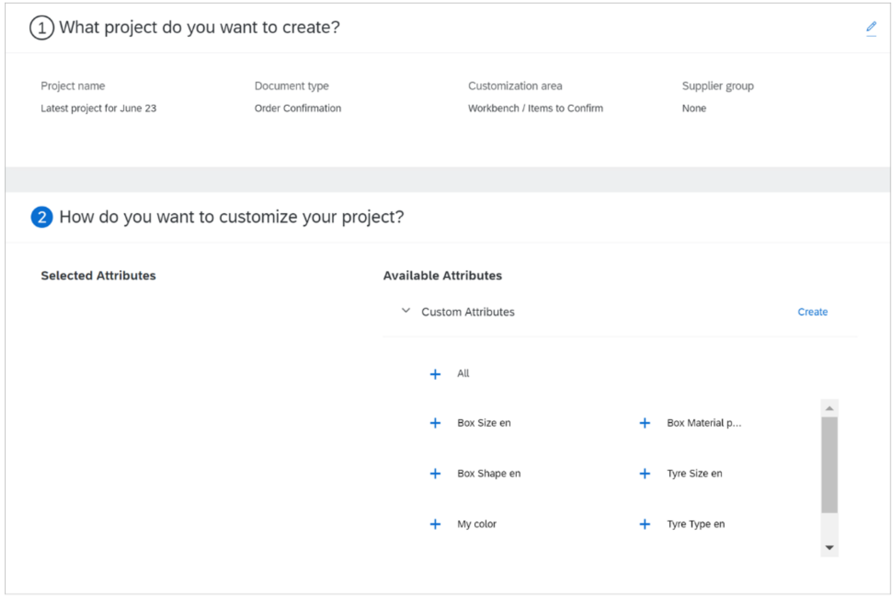
Items to Ship

- If you completed the first step (**What project do you want to create?**) on the **Create Project** page and clicked **Save** to save your project information, start with Step 1. If you completed the first step and clicked **Next**, start with Step 2.

Feature at a Glance

Introducing: **How to customize a workbench tile - procedure**

1. From the **Customization Self Service** page, 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



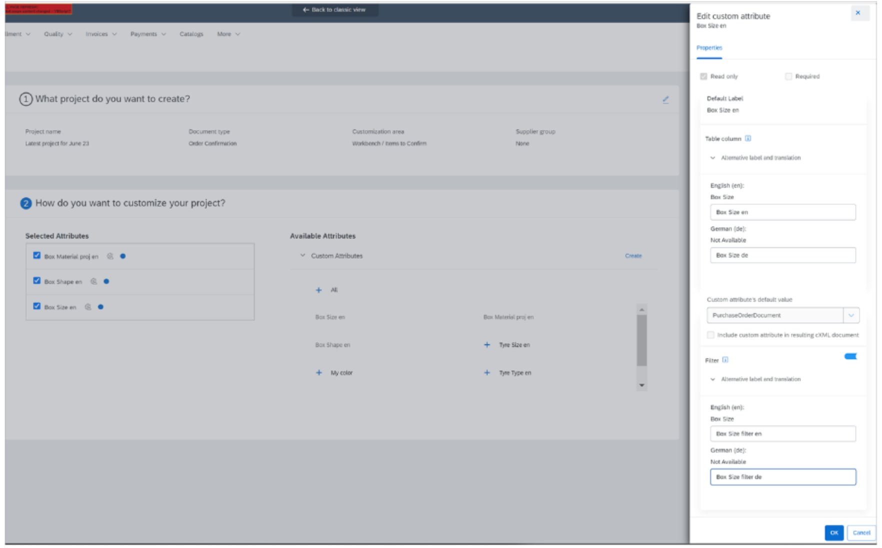
Feature at a Glance

Introducing: **How to customize a Workbench Tile - Procedure**

2. Select up to five custom attributes to add to the **Workbench** tile. You can select all attributes, or you can individually select attributes from the **Custom Attributes** list.
   - You can also click **Create** to create a new custom attribute; see How to create a custom attribute for instructions.
3. **Optional:** Edit your selected attributes.
   a) Click the edit icon next to an attribute to edit it. The **Edit custom attribute** popup opens. The attribute name displays on the second header line in the popup

   b) Make one or more of the following edits.Add an alternate label and translations for the table column.
      - Make the attribute a filter by toggling the **Filter** setting. You can set a maximum of three filters.
      - Add an alternate label and translations for the filter.

   c) Click OK
4. Click **Save**.The customization project is saved and the **Customization Self Service** page displays.



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