

Support for Document Annotation within the Guided Onboarding Page for Intelligent Invoice Conversion NP-38184

Target GA: February, 2024



Feature Overview

Introducing:

Support for Document Annotation within the Guided Onboarding for Intelligent Invoice Conversion NP-38184

Feature Description

As part of the Intelligent invoice conversion onboarding, the template activation step is the most important and currently this has a few user actions to activate the template and the Annotation Document user interface also opens as a new application interface outside the onboarding.

To improve this user experience the template activation step has been further simplified and the document user interface now is within the guided onboarding.

These are user interaction improvements being made to simplify the supplier onboarding experience further.

Key Benefits

Faster and easier onboarding by making the template activation simpler and intuitive for the supplier admin.

Document annotation user interface is automatically shown and supplier admin can seamlessly move between the files to annotate them.

Redundant listing of files and additional user actions that were present earlier have been removed.

Audience:

Supplier

Enablement Model:

Automatically On

Applicable Solutions:

SAP Business Network

Prerequisites, Restrictions, Cautions

Prerequisites

- None

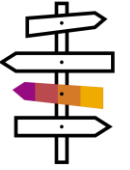
Restrictions

- None

Cautions

- None

User Story



A supplier admin wants to annotate and activate the template in simple intuitive steps as part of the onboarding for Intelligent invoice conversion.

Current user experience :

- The listing of files is redundant between the upload and activate template steps.
- User has to associate the file explicitly to the template after annotation
- There are many status associated with this step due to multiple user actions.
- The steps to get to the document user interface is not easy and it opens up in a different application browser
- Its not easily understandable how the template activation is enabled.

Improvements :

- The template activation step has been simplified and some of the user actions have been removed.
- The statuses are simple to understand and the document user interface is automatically available.
- It is easy to move between files after annotation and intuitive to understand when the template is ready for activation

Supplier admin can easily get to the annotations for their uploaded files and activate the template quickly as part of the onboarding.

Feature Details

> Upload sample files

▼ Annotate and active template

Please use this step to annotate the documents you uploaded, associate them with the template you have created and finally activate the template. [Learn more](#)

Name	Associate with template	Status	Action
SamplePdfInv.pdf		Pending annotation	Annotate

SamplePdfInv.pdf

Document Type: Invoice
Upload Date: March 23, 2023
Schema: CS_sap_AN21000088456-T_buy_AN21000080313-T
Status: **READY**

Extraction Confidence Range:
0% - 50% 51% - 79% 80% - 100%

Header Fields (137)

- billToCity
- billToCountry
- billToDistrict
- billToEmail
- billToExtraAddressPart
- billToFax
- billToHouseNumber

> Upload sample files

▼ Annotate and active template

Please review and revise the annotations for each sample file. After confirming all the sample files, you can activate the template.

TestPDF2.pdf (1/1) Confirmed

Document Type: @undefined
Upload Date: Invalid Date
Template: Status:

Preview Not Available

Extraction Confidence Range:
0% - 50% 51% - 79% 80% - 100%

Header Fields ()

Line Items ()

Label	Value
No data	

TestPDF2.pdf

- allowanceCode1
- allowanceCode2
- allowanceEndDate1
- allowanceName1
- allowanceName2
- allowancePercent1
- allowancePercent2
- allowanceStartDate1
- allowanceStartDate2
- billToCity
- billToCountry
- billToDistrict
- billToExtraAddressPart

- The **Annotate and Activate template** step has a file chooser for all uploaded files with initial **Status as Pending**.
- The **Document annotation** page automatically shows up with the document view and extraction details of the first file in the list.
- The supplier admin can now go about reviewing the annotations and manually annotate additional fields as they would earlier and then once done, they would click on **Confirm**.
- This will make the status of the file as **Confirmed** (you can see the status near the file chooser shows how many total files and how many are confirmed currently)
- Supplier admin will do the same for each of the files and once all the files are in **Confirmed** status, the **Activate template** button is enabled.
- Supplier admin will click on **Activate template** to activate this template.

Thank you.

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