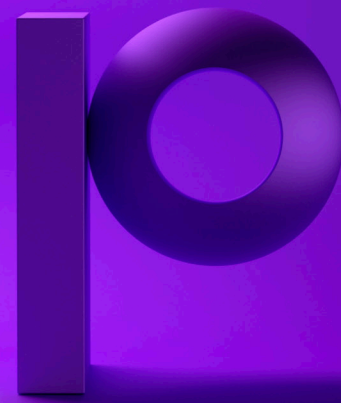




Automate Evolve is a business process automation platform specifically designed to digitize strategic data processes—like product launches, customer and vendor onboarding, GL account setup, and plant maintenance.

# Process automation for strategic data assets



precisely

## What is Automate Evolve?

Automate Evolve is a business process automation platform specifically designed to digitize strategic data processes—like product launches, customer and vendor onboarding, GL account setup, and plant maintenance.

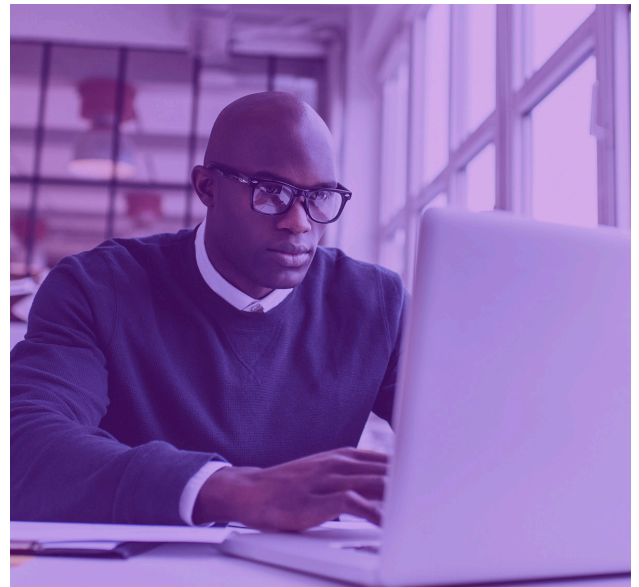
Automate Evolve's unique combination of capabilities enables business teams in enterprise organizations to speed up processes, improve data quality, and ensure compliance with internal and external procedures.

Enterprise-grade  
workflow &  
automation

Robust data  
stewardship

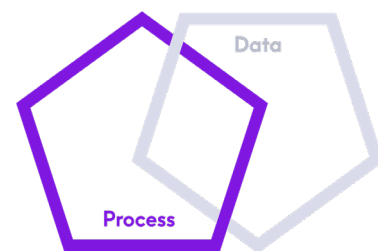
Deep SAP  
integration

No-code,  
low-code  
solution design



## Which type of process is Automate Evolve designed for?

Although Automate Evolve can automate any business process, it's designed to digitize a specific class—one where process and data are interdependent. We call these strategic data processes.



## Characteristics of a strategic data process

- The data supports critical business processes
- Getting the data wrong has costly consequences
- Collecting data is complicated and involves many teams
- The data is complex and can span many objects
- There's a high volume of data create/change requests
- The data, business rules, and processes:
  - Vary across business units and geographies
  - Are subject to audit
  - Must be compliant
  - Change frequently

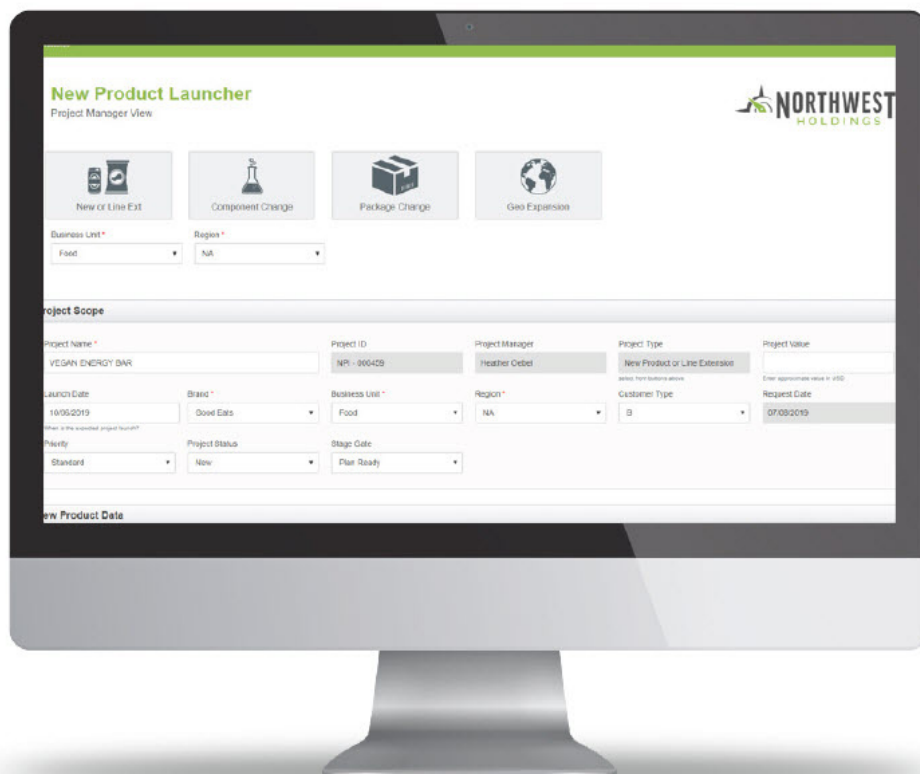
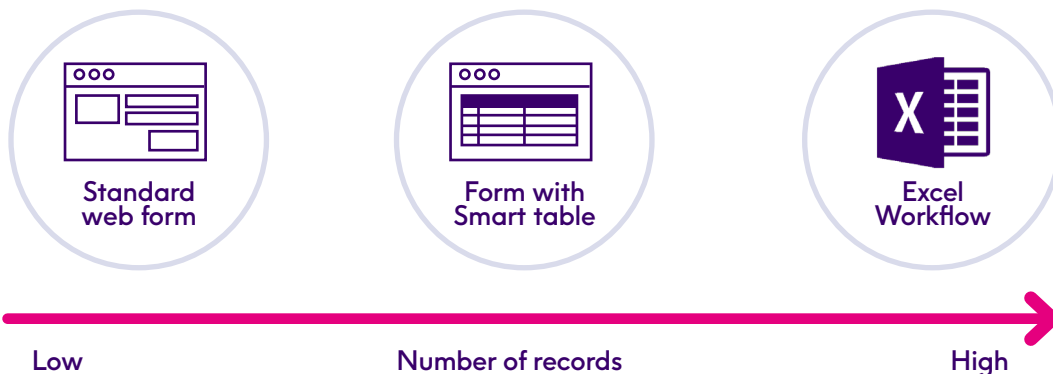
Discover how this no-code, low-code platform enables you to drive results at scale, become more agile, and transform digital into a competitive advantage.

## Unique capabilities

We've honed our platform to handle the rigors of automating complex data-intensive processes. Explore our unique set of built-for-purpose features you won't find in any other process automation or data management platform.

### Choose the right front end for your process— web forms or Excel

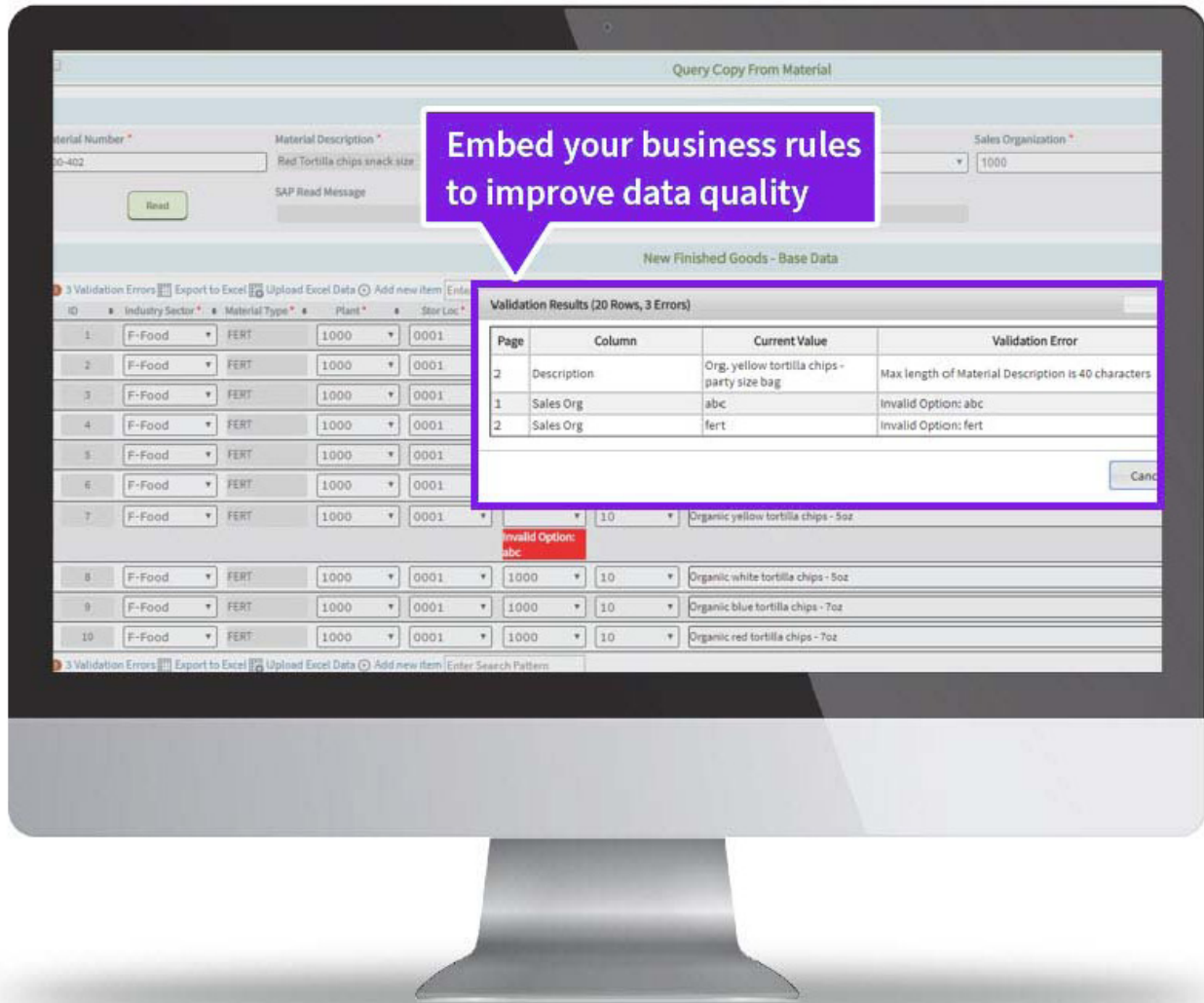
Give business users tailored, role-based web forms to handle one or a few related records or Excel workbooks for mass data management tasks.



Eliminate the need to use the SAP GUI and give business users easy-to-use web forms or Excel workbooks to input or approve data.

## Handle multiple records with patented SmartTables

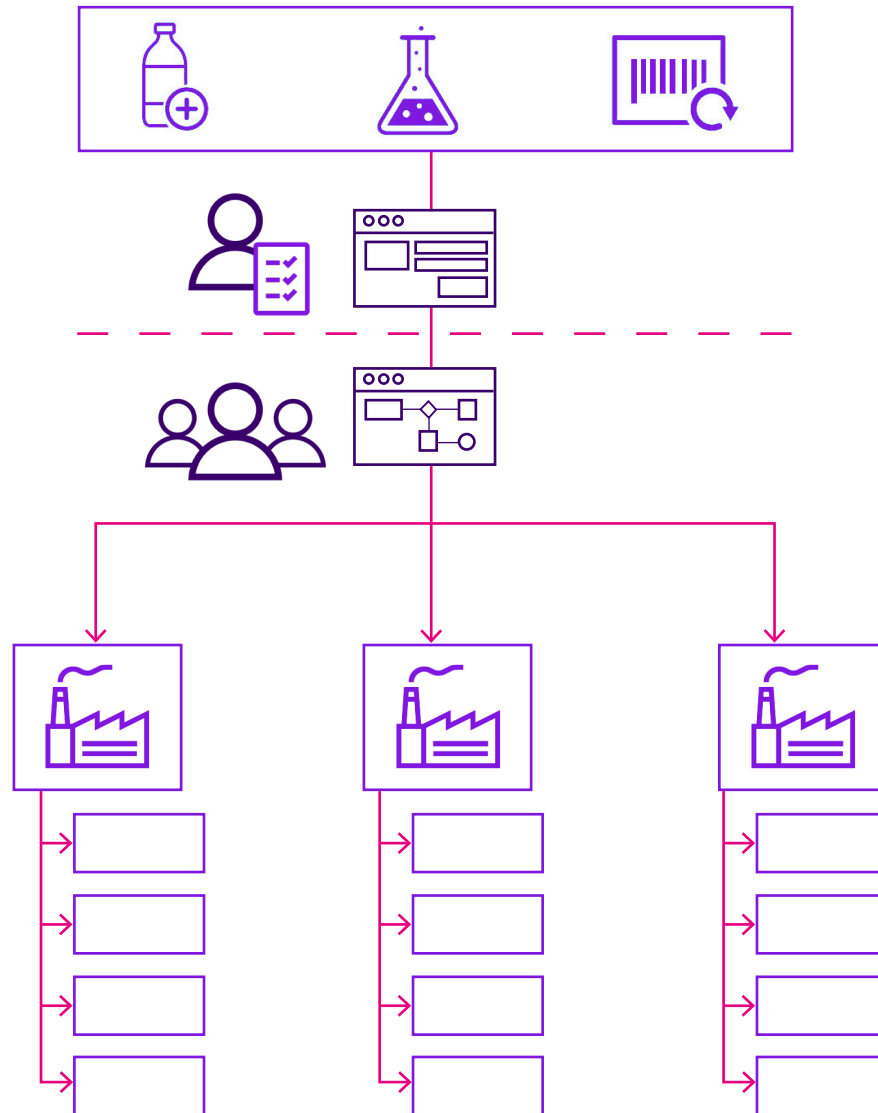
Enable business teams to work faster and get more done by using our patented SmartTable technology. SmartTables enable business users to create or update multiple related records in a single form—while enjoying all the data stewardship capabilities inherent with web forms—like required fields, smart form logic, role-based web views, and field standardization. You can import data from an Excel workbook directly into a SmartTable to speed up the data entry process.



SmartTables are patented web form elements that enable business users to create or update multiple related records in a single web form.

## Digitize complexity with dynamic process linking

Build solutions that dynamically kick off the right processes and sub-processes to collect and approve data or complete tasks across multiple data objects. This powerful functionality enables you to digitize complex multi-layered processes, like product launches and customer or vendor onboarding. With this powerful capability, you can collect centralized data and handle plant, sales org., purchasing org., and other extensions and decentralized data in a single solution.

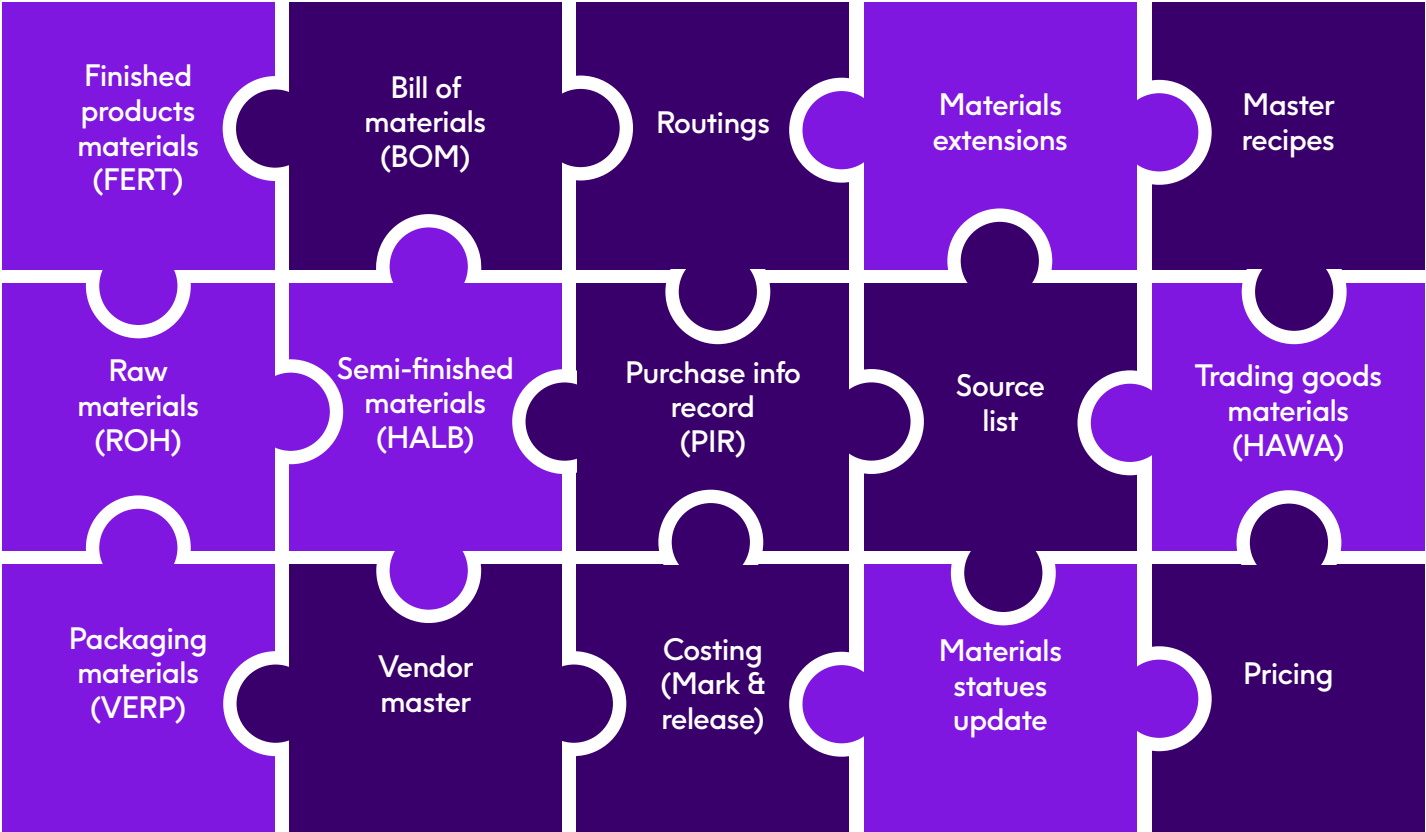


An example of an automated product launch solution that uses dynamic process linking to kick off the appropriate processes to collect different data from centralized and decentralized sources. Processes can run in parallel for efficiency and at their cadence to give you maximum flexibility.

**Be more agile with a flexible, extensible solution architecture**

With Automate Evolve, you can support the different process and data needs of your regions, product lines, or business units in one workflow solution—giving you maximum flexibility and enabling you to digitize faster and make a greater impact.

Our platform also enables you to build modular solutions and expand your automation footprint over time. And because Automate Evolve is designed for business teams, you can modify your automation solutions quickly and easily without calling on IT or expensive external resources—a benefit that enables you to keep pace with a dynamic business landscape while reducing IT spend.



## Get some quick wins with Excel-to-SAP automation

Automate Evolve includes Automate Studio, our market-leading Excel-to-SAP automation platform. People like business analysts, SAP super users, and master data professionals can use Studio on their desktops to quickly build SAP-enabled Excel workbooks that enable business users to create or update SAP fast or run operational reports.

With this powerful platform, your organization can get some quick wins while you are digitizing your more complex strategic data processes. Business teams can quickly automate tasks like sales orders, invoicing and pricing updates, as well as automating the creation and maintenance of master data en masse.

Studio also enables you to improve data quality by building in data guardrails to ensure data coming into your systems is right the first time.



Material Number	Description	Plant	Storage Location	Net Weight	Gross Weight	Weight Unit	SAP Contoller	Name of SAP Contoller	Plant Specific Material Status	Log
JH-BCMA-3000	Description JH-BCMA-3000 changed	3000	3001	10.000	10.000 LB	ZBH	John Nam	28		
JH-BCMA-3001	Description JH-BCMA-3001 changed	3000	3001	10.000	10.000 LB	ZBH	John Nam	28		
JH-BCMA-3002	Description JH-BCMA-3002 changed	3000	3001	10.000	10.000 LB	ZBH	John Nam	28		
JH-BCMA-3003	Description JH-BCMA-3003 changed	3000	3001	10.000	10.000 LB	ZBH	John Nam	28		
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JH-BCMA-3009	Description JH-BCMA-3009 changed	3000	3001	10.000	10.000 LB	ZBH	John Nam	28		
JH-BCMA-3010	Description JH-BCMA-3010 changed	3000	3001	10.000	10.000 LB	ZBH	John Nam	28		
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Included with Automate Evolve, Automate Studio is an Excel-to-SAP desktop automation platform that enables business teams to quickly create SAP-enabled Excel workbooks to speed up mass data creation and maintenance tasks and run operational reports.

## Get granular control with rich administration features

With Automate Evolve, your administrators get granular control over who can do what with Precisely software. From who has access to a certain type of Precisely Automate license, to when someone can run live queries against SAP, you always remain firmly in control of the data being exchanged with your SAP system. Administrators can also quickly run audit reports to see who changed data and when to help with compliance audits.



Store and manage content centrally



Approve scripts prior to use



Assign and manage Precisely licenses



Enforce governance through roles management



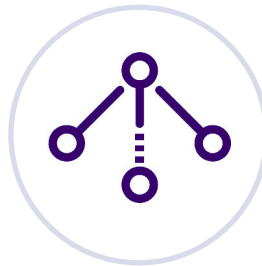
Get ROI, SLA, and usage reports



Run audit reports to compliance requirements



Set granular policies for data exchanges with SAP



Manage SAP and other data connections



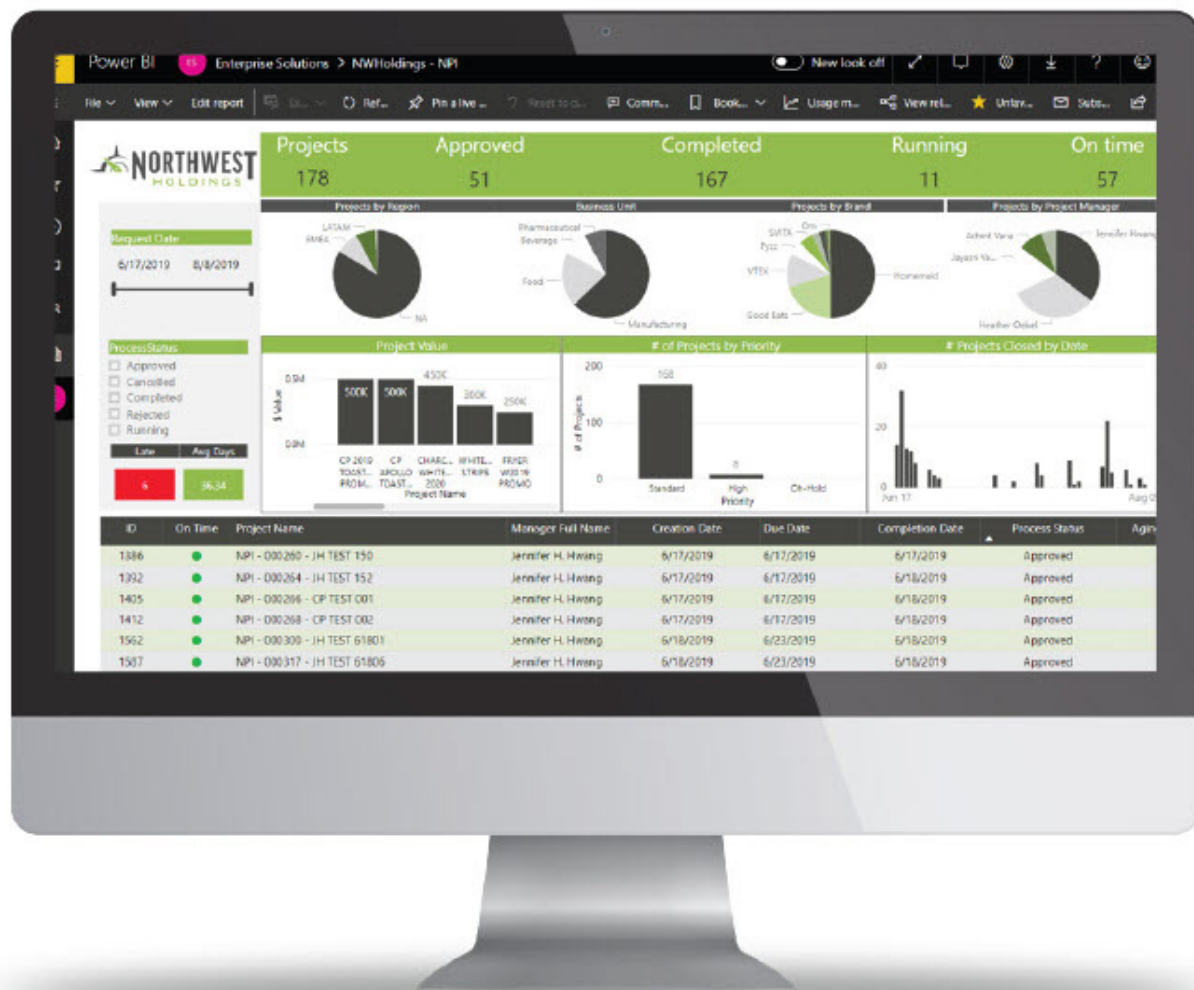
Schedule server-side SAP data exchanges

## The right combination of capabilities

### Enterprise-grade automation and workflow

Automate Evolve has all the enterprise-grade automation and workflow capabilities you need to automate complex data-intensive processes. Designed for people without technical SAP programming skills, Evolve enables you to build flexible automation solutions that dramatically reduce cycle times and increase process visibility. Key capabilities include:

- **Smart logic** – build flexible, robust solutions that use logic to drive what data is collected and the next steps in the workflow based on user input or other parameters.
- **Parallel tasks** – assign tasks to multiple people or departments simultaneously to speed up processes.
- **Email notifications** – keep processes on track with task assignments, reminders, and out-of-office emails.
- **SLA tracking** – set your task SLAs to trigger email notifications, drive status reports, or take corrective actions.
- **Task reassignment** – enable workflow participants to reassign a task to someone else to keep your process on track.
- **Attachments** – collect source documents that support your processes to increase compliance and make audits easier.
- **Dashboards & reports** – use system-generated reports and build custom reports and dashboards with your tool of choice to get more visibility into your processes.



## Data stewardship

Automate Evolve includes a comprehensive range of proactive data stewardship capabilities, including:

- **Search for duplicates** - give business users an easy way to check for duplicate records. Automate Evolve web forms support numerical, text, and wildcard searches, making it simple to find records with live queries to SAP.
- **Smart form logic** - use logic to design smart, flexible forms that help business users provide the correct data, hide or show fields based on user input, and pre-populate data to save time and improve data quality.
- **Role-based form views** - roll out forms tailored to job roles and the step in the process to get better data.
- **Required fields** - instantly make fields required and eliminate holes in your data without going through the pain of making those fields required in SAP.
- **Field standardization** - standardize how data appears, such as capitalization and field length.
- **Copy 'like' records** - save time and improve quality by copying data from existing records before making necessary edits.
- **Live SAP validation** - give business users the ability to check for data errors before submitting data to SAP. Any problems will be highlighted so users can quickly identify errors and correct data.
- **Modifiable field drop-down lists** - narrow down the available options for business users by defining pre-set values for fields with drop-down lists.
- **SAP F4 lookups** - give users access to SAP F4 lookups to make choosing the right field value easier.



Precisely data stewardship capabilities	Excel	Web form
Search for duplicates		✓
Smart form logic		✓
Role-based views		✓
Field standardization		✓
Easy required fields	✓	✓
Copy 'like' records		✓
Live SAP validation	✓	✓
Modifiable field drop down values	✓	✓
SAP F4 lookups	✓	✓

## Deep SAP integration

Automate Evolve enables you to digitize complex SAP processes faster and build high-performance solutions with a range of rich SAP capabilities out-of-the-box so you can get to value fast.

These capabilities enable you to:

- Build data exchange scripts with a fast 3-step process
- Securely exchange data in the background via RFC
- Build solutions quickly with SAP plugins
- Bypass the SAP GUI to speed up data entry
- Respect SAP permissions and security
- Validate data against SAP before posting
- Use SAP F4 lookups in web forms or Excel
- Exchange data fast with BAPIs

Precisely Automate platforms are certified for both ECC and S/4HANA and always respect SAP user rights and permissions so you can rest assured that people can only do what their SAP credentials allow.

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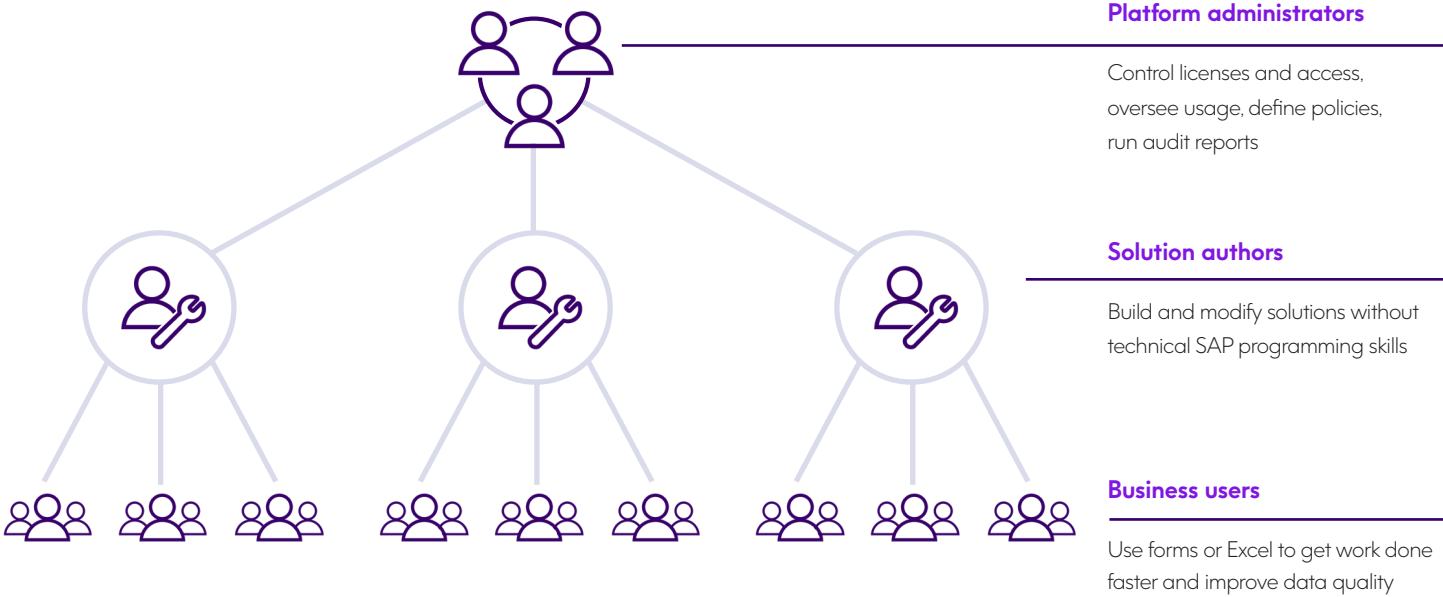
**SAP® Certified**  
Integration with SAP S/4HANA®



**Microsoft Partner**  
Gold Application Development  
Gold Collaboration and Content

No-code, low-code solution design

Automate Evolve is designed for business teams, so people like business analysts or master data professionals can digitize solutions without needing technical SAP programming skills. Someone in IT or the business can administer all aspects of Automate Evolve and define granular user permission and policies. This approach enables your organization to expand your automation footprint and make an impact at scale without risk to the security or the performance of your SAP systems.



## Automate Evolve portals

### Secure, internet access for your SAP data

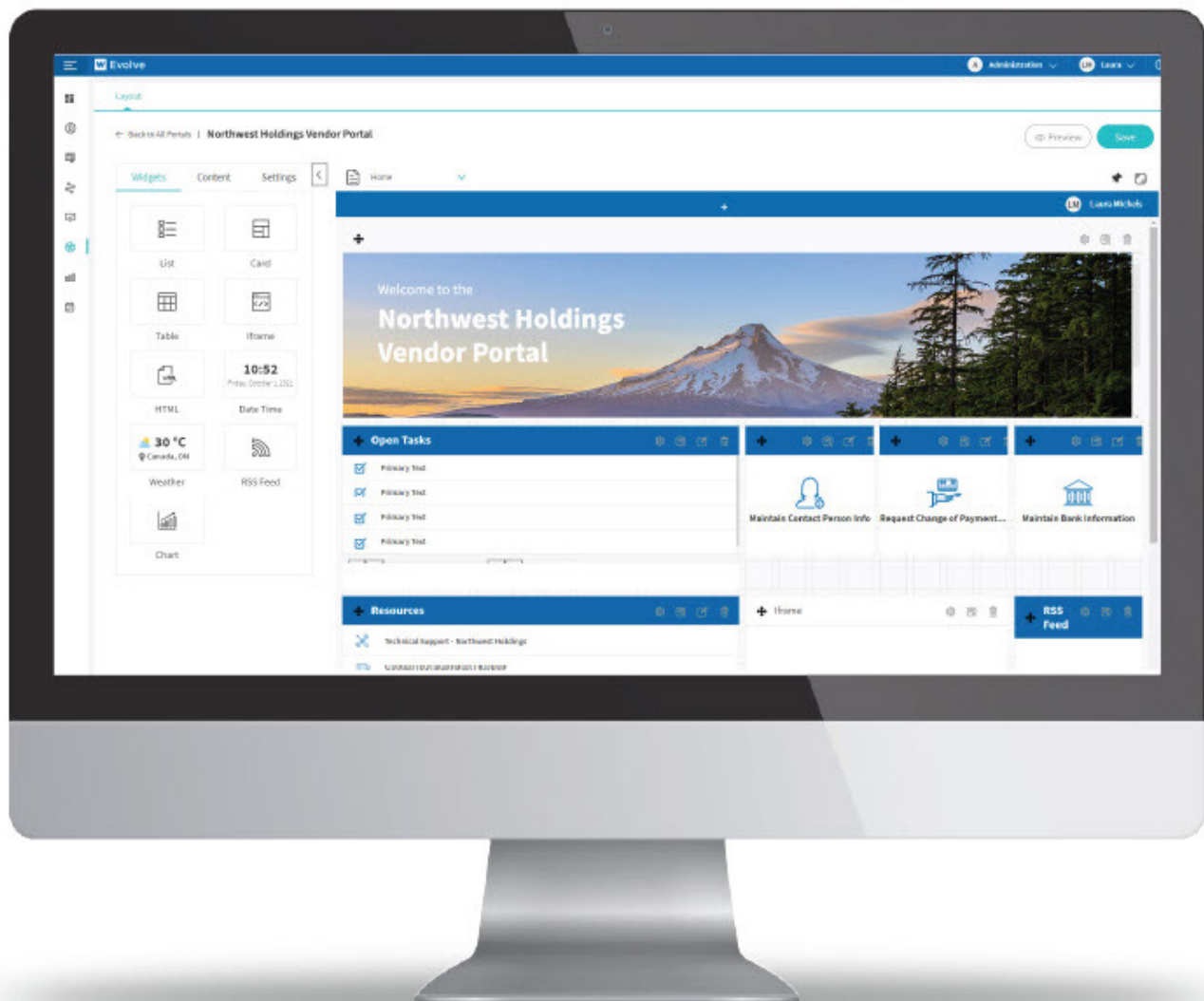
With Automate Evolve 20.2 and later, you can easily create secure, branded portals that allow customers, vendors, partners and employees to input data during the onboarding process or update their data whenever there are changes. All using business-friendly, online forms.

### Widget-based portal builder

Automate Evolve portals are simple to create and deploy. Using a visual design editor with pre-built widgets that provides drag and drop simplicity, portal pages can be customized for individual or multiple parties, depending on your needs.

### Additional features

- Chat
- Self-service SAP data management
- Multilingual support
- Powerful workflows that can include employees in the loop to validate and approve data
- Dashboards with access to charts and reports



Automate Evolve Portals extend any Evolve workflows and forms solution to external and internal participants. They give you the flexibility to choose which data and forms are available to users and what other features to include in the portal interface.

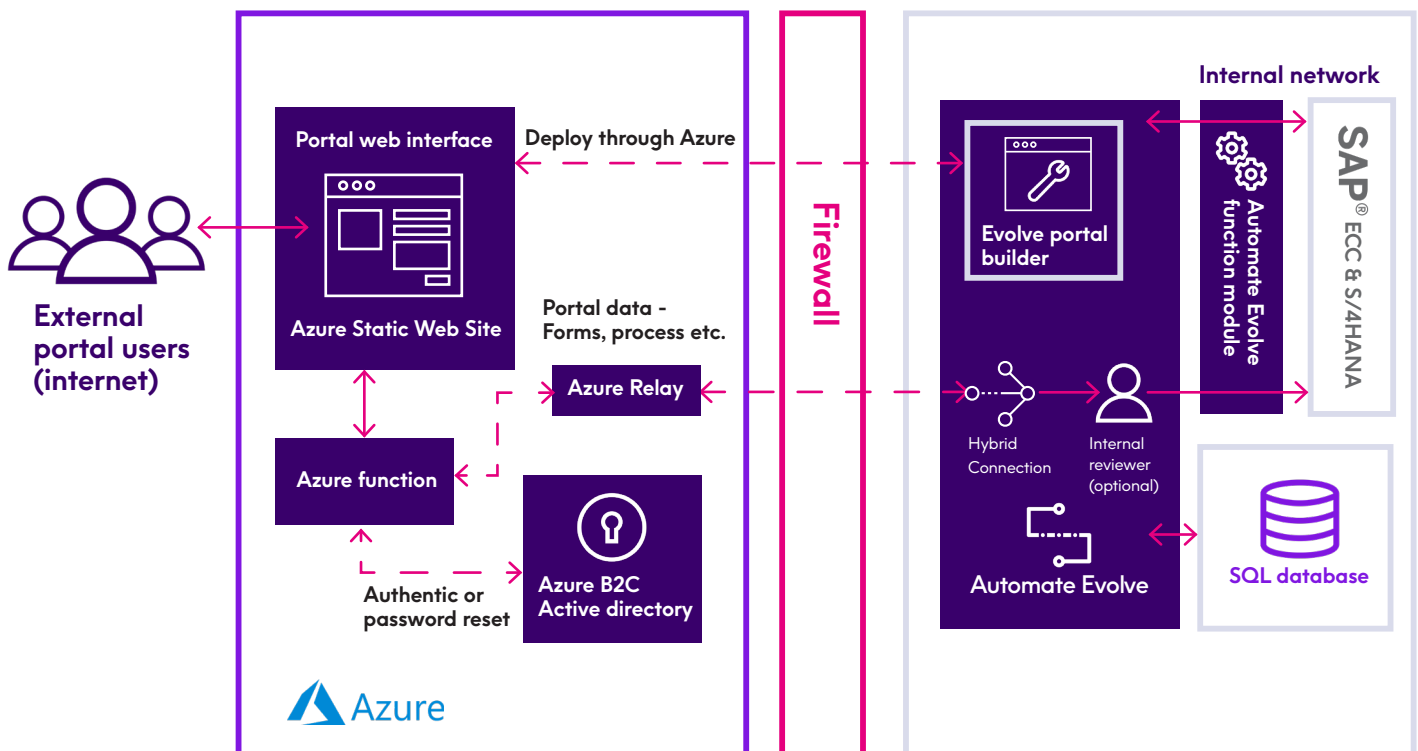
## How Automate Evolve portals work

Automate Evolve portals are developed using the Automate Evolve portal builder and use Microsoft Azure Services to securely deploy just the portal on the Internet for users to access anywhere around the globe. The data entered by the customer or vendor can then be directly posted to SAP or route via workflows to an internal reviewer to ensure that the information is correct. Once the process is complete, the data can be automatically posted to SAP. External users can also query SAP data, check status on their dashboard or access reports. Automate Evolve portals use Microsoft Azure Services to deploy for external audiences

## Key benefits

- Purpose-built portals for self-service data management
- Customer and vendor self-service data management
- Streamlined master data processes
- Simplified portal development experience
- Internal portals for Automate Evolve form users

## Evolve portal architecture: External



## Automate Evolve Restful APIs Connected SAP data management and process automation

With the 20.2 release of Automate Evolve, the platform now includes a set of Restful APIs that enable Automate Evolve to manage and automate broader, end-to-end processes by connecting multiple systems, including cloud services, with SAP. These API's help solution developers efficiently integrate systems and processes to eliminate manual data management that often leads to poor data quality and ungoverned process tracking.

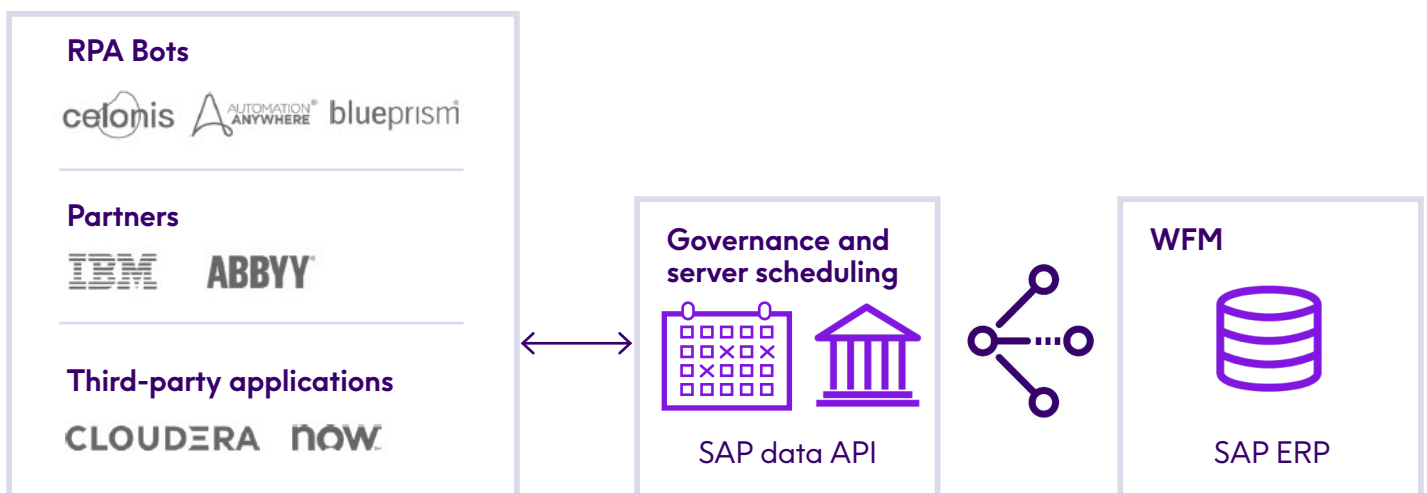
For teams creating seamless, end-to-end solutions, Automate Evolve automates business processes that require complex SAP data interactions with other, third-party systems like Salesforce, or that use the ODATA protocol. Traditionally, processes like these required inflexible, custom solutions that do not easily adjust to dynamic business environments. Automate Evolve gives you the agility and flexibility you need to compete and thrive in today's business landscape.



### SAP Data API

Working as part of a more extensive automation process, the SAP Data API acts as the last mile into SAP ERP systems by leveraging pre-built Automate Studio scripts, thus eliminating the need for UI screen-scraping integration offered by RPA providers. The combination of Automate Studio scripts and this API makes bot-based automation efforts faster to deploy, easier to maintain, and run at the speed of your business. This synchronous API enables your team to more easily automate end-to-end processes in collaboration with other automation vendors, like RPA, to deliver lower total cost of ownership.

Precisely Automate's SAP Data API enables direct and differentiated integration, via the Precisely Function Module (PFM), with SAP ERP systems in scenarios that don't require data enrichment for loading data into SAP and has scalable runtime execution performance. It is an add-on to Evolve and Studio Manager and activated with a license key.

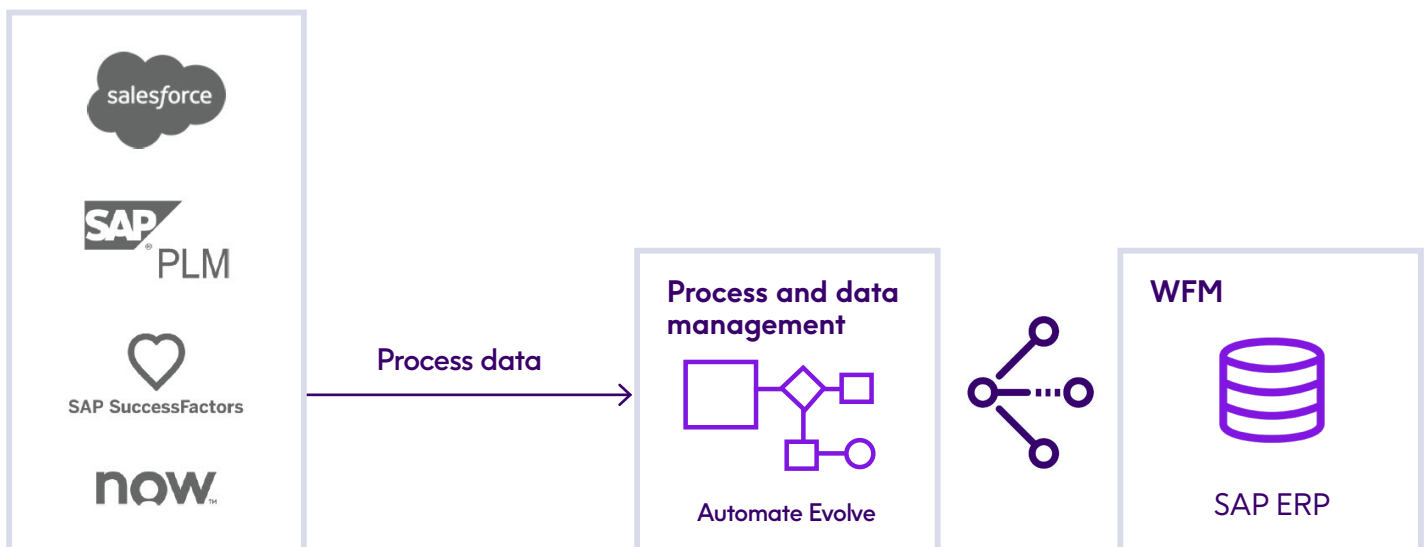
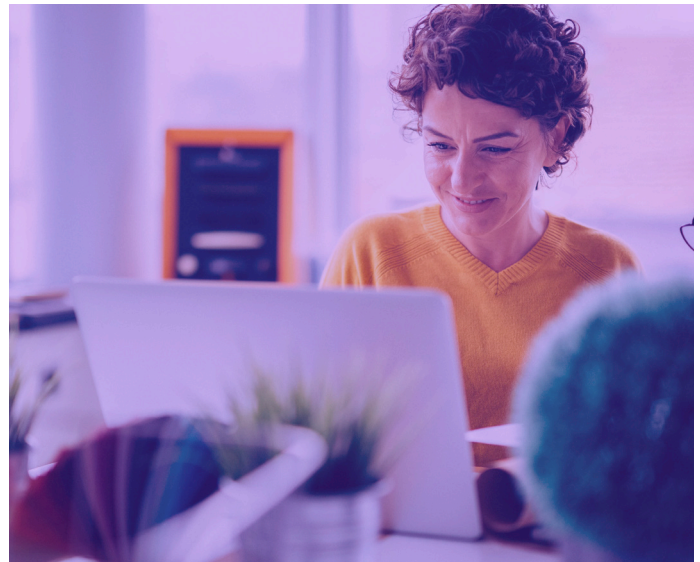


## Digital Access API

The Digital Access API allows you to seamlessly launch Automate Evolve workflow processes for either human-assisted workflows or completely automated sequences with your SAP ERP system. For human-assisted workflows, you use a web form leveraging all of the functionality in Automate Evolve.

With the Digital Access API, you can also use Automate Evolve to manage Excel files through a process where larger datasets need a workflow solution. The result is that end-users never have to access SAP directly but can access the full capabilities of Automate Evolve's user-friendly forms and workflows to manage the SAP ERP portion of the process.

The Digital Access API is an asynchronous API that scales in terms of the amount of data managed and the frequency of process triggering. Doing this enables an external application to kick start or update an Automate Evolve workflow before its data is ultimately posted to SAP. Using this API, you can also get and take action on user assignments allowing you to show Automate Evolve tasks on a UI other than Automate Evolve. The Digital Access API is an add-on to Automate Evolve and can be activated by a license key.



### Third-party API support

Many enterprise-wide data management use cases require workflow that needs to connect multiple third-party or cloud systems. This RESTful API enables Automate Evolve solution developers to easily integrate with other systems of record that have RESTful APIs, such as Salesforce or SAP's ODATA service. You can query data from these third-party systems into your process or send data from your process to third-party systems depending on your use case.

It can also be used in conjunction with the Digital Access API to manage and govern data using Automate Evolve through complex process workflows to support broader digital transformation initiatives.

