Precisely Automate
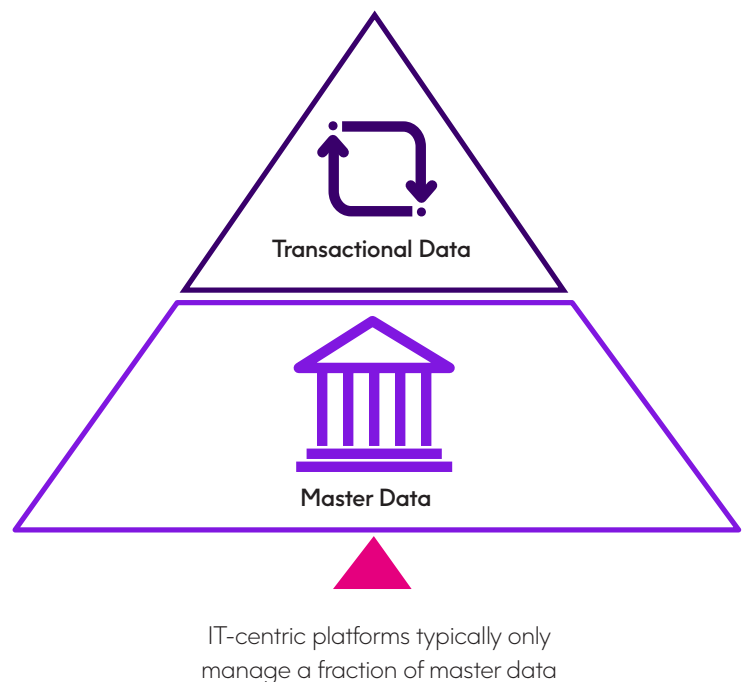# for SAP® Master Data

Solution Description

Take charge of your master data and make an impact on your business

It's impossible to overstate the importance of SAP master data to all areas of your business. The integrity of day-to-day transactions, executive decision making, and everything in between relies on getting your master data right. However, in many organizations, only a small fraction of master data is actively managed—leaving the rest ungoverned. Precisely Automate empowers people in, or close to the business—like SAP business analysts, SAP power users, or master data professionals—to take charge of the remaining SAP master data and make a real impact on their organizations.

These same people can also use Automate Evolve and Automate Studio to impact transactional data process like sales orders, invoicing, journal entries, and maintenance work orders.
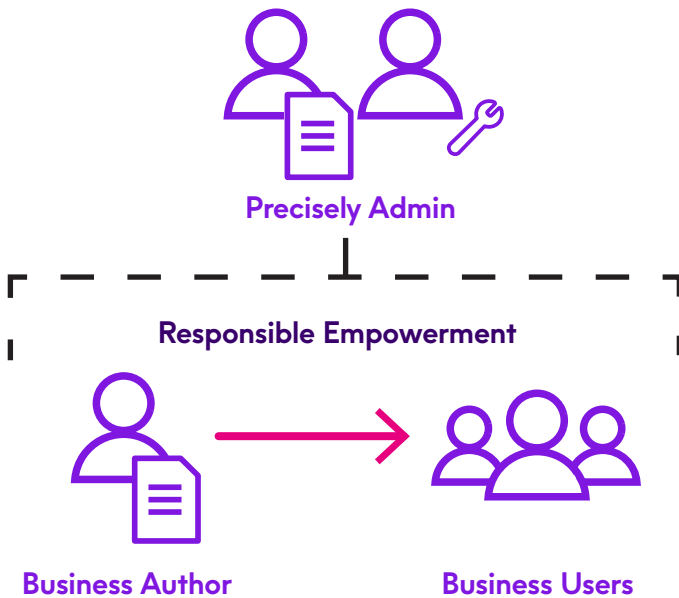
Learn how you can use Precisely Automate to deliver value to your organization:

- **Impact data quality at scale** – enforce your business rules and improve data quality across all your master data in any SAP module—reducing costly downstream errors and business risk.

- **Accelerate any master data process** – eliminate manual data entry via the SAP GUI and reduce creation and update cycle times across your SAP landscape—enabling the business to move faster.

- **Make a quick impact** – rapidly build Excel-based solutions in as little as a few hours, then build on your success with sophisticated workflow solutions you can deploy in a fraction of the time of IT-centric solutions.

- **Make audits easier** – quickly report on who did what and when in your SAP systems with Precisely Automate and easily get to the underlying data to speed internal and external audits.

- **Be more agile** – deliver flexible solutions that can handle the differing business needs and enable business teams to modify their automation solutions—without having to tap IT or expensive external resources.

- **Report on key metrics** – track your progress and report on time and money saved, productivity, errors, and SLAs.

- **Deliver ROI** – join thousands of SAP ERP customers around the globe who rely on Precisely Automate to make a positive impact on their bottom line.

Transactional Data

Master Data

IT-centric platforms typically only manage a fraction of master data

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The business-led, IT-enabled data management model

So how does Precisely Automate enable business teams to fill the data management gap? We've developed a model that ensures that business teams are empowered to make an impact, without risk to SAP security or operations.

Precisely Admin

Responsible Empowerment

Business Author → **Business Users**

People in or close to the business, like SAP business analysts, SAP power users, or master data professionals, author and modify solutions with our software, without needing specialized SAP technical coding skills.

These business authors roll these solutions out to business users who work in Excel or web forms instead of the SAP GUI to get their work done faster, whether it's supplying or approving data, or running reports.

Someone from IT or the business administers the Precisely Automate platform, centrally managing everything from license assignment and solution approval to granular policies on how many records can be moved between what SAP system and when. And because Precisely Automate always respects your SAP permissions, people can only do what their SAP credentials allow.

> "The key reason we went with Automate Studio is the ability for us in the business to have the tools and flexibility to changes scripts without having to rely on IT. We recommend Precisely Automate software for master data management, you will see productivity benefits almost immediately."
>
> Lance Yoder
> Business Process Analyst
> Rockwell Automation

Precisely master data solution options

Precisely Automate platforms offer a range of options to enable you to improve data quality and accelerate master data processes at a pace that makes sense for your business.

Business users work in Excel

Automate Studio

Exchange data with SAP quickly and easily using Excel

- Data creation and maintenance
- Data migration
- Operational reporting
- Data stewardship

Business users work in Excel

Automate Studio Manager

Share, manage, & control Precisely solutions across the enterprise

- Basic 2-step workflow
- Centralized management
- Granular control of licenses, users & policies
- Extensive audit and ROI reporting Server-side job execution
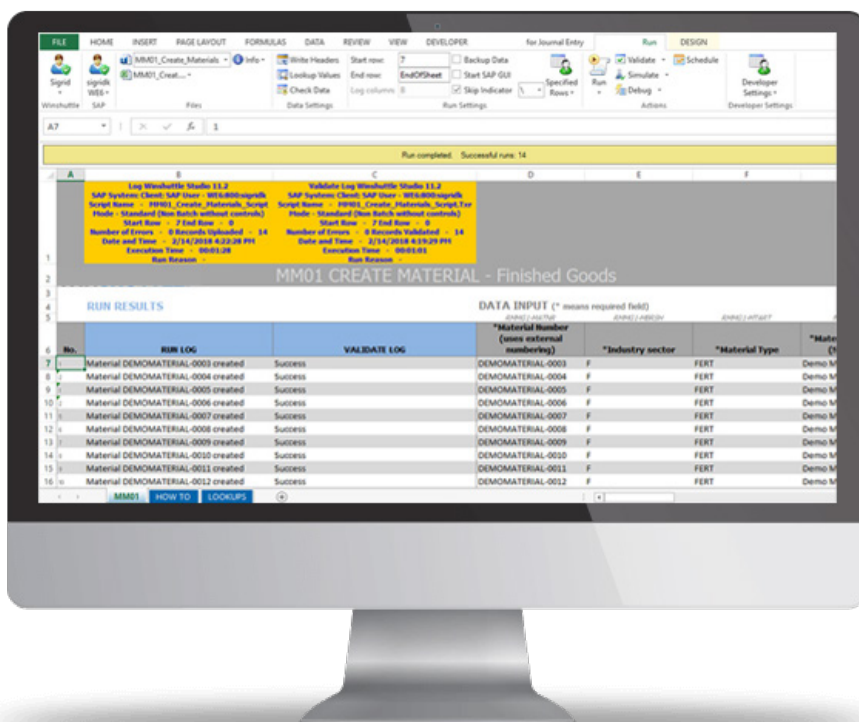
Business users work in Excel or web forms

Automate Evolve

Automate and streamline SAP business processes using workflows

- Advanced form and workflow capabilities
- Advanced data stewardship capabilities via web forms
- Detailed process analytics

Automate Studio

If your master data management task doesn't require workflow, you can use Automate Studio in standalone mode to quickly build and roll out Excel-based automation solutions. Automate Studio is a great tool for handling a few records at a time, for mass creates and updates, and for migrating data. You can also use Automate Studio to quickly build operational reports that pull SAP data to spot check data quality or prepare for audits for example.

Get some quick wins with Automate Studio by creating Excel-based solutions that speed up master data management and improve data quality.

We provide data stewardship capabilities, such as live SAP data validation and SAP F4 lookups that you can build into your Excel-based solutions to improve the quality of data coming into your system.

Automate Studio Manager

Automate Studio Manager is a powerful administration and governance platform for your Automate Studio licenses. It enables you to get granular control over who can do what with Automate Studio software, share content, assign licenses, execute jobs from the server, and much more.

Automate Evolve

For the full suite of Precisely Automate master data solutions, choose Automate Evolve. Automate Evolve is the only automation platform specifically designed to digitize master data and other data-intensive SAP processes—like product launches, customer and vendor onboarding, GL account setup, and plant maintenance.
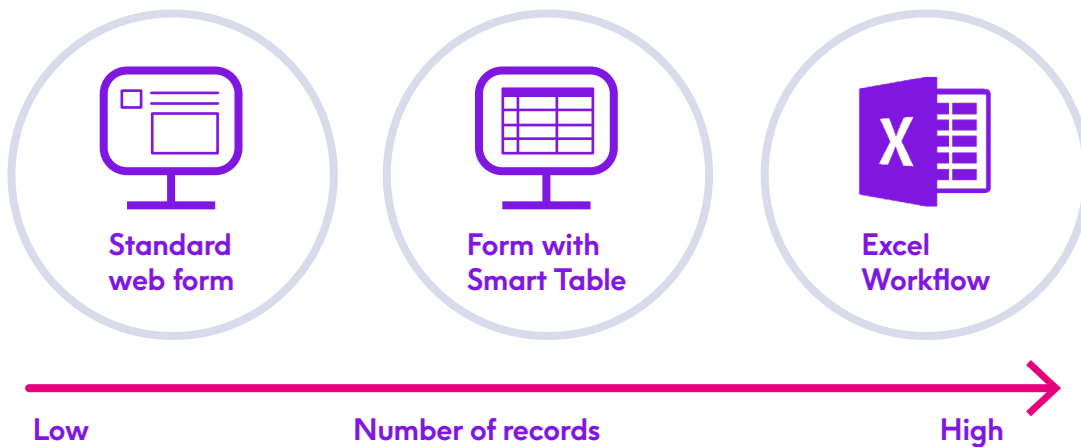
Automate Evolve includes all the functionality of Automate Studio and Automate Studio Manager, plus the ability to build sophisticated SAP workflow solutions that streamline master data collection and make the maximum impact on your data quality and compliance goals.

Here is an example of a Automate Evolve forms and workflow solution for updating vendor master data. Each person in the process gets a role-based view of the data and is only able to do what their SAP credentials allow.

Choose the right front-end tool for your workflow

With Automate Evolve your business users get their work done with either a web form or an Excel workbook depending on your process needs and the number of records you'd like to work with during the workflow.

Standard web form

Form with Smart Table

Excel Workflow

Low   Number of records   High

You can use a standard web form for processing up to around ten records. If you need to process more records, up to around 100, our patented SmartTable web-form technology is a great choice. SmartTables are a container element that enables you to process a lot of related records 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 the data entry process. If you'd like to process more than 100 records, we recommended using our Excel workflow solution. Here, your business teams collect, change, or approve data in an Excel workbook that is routed to workflow participants.
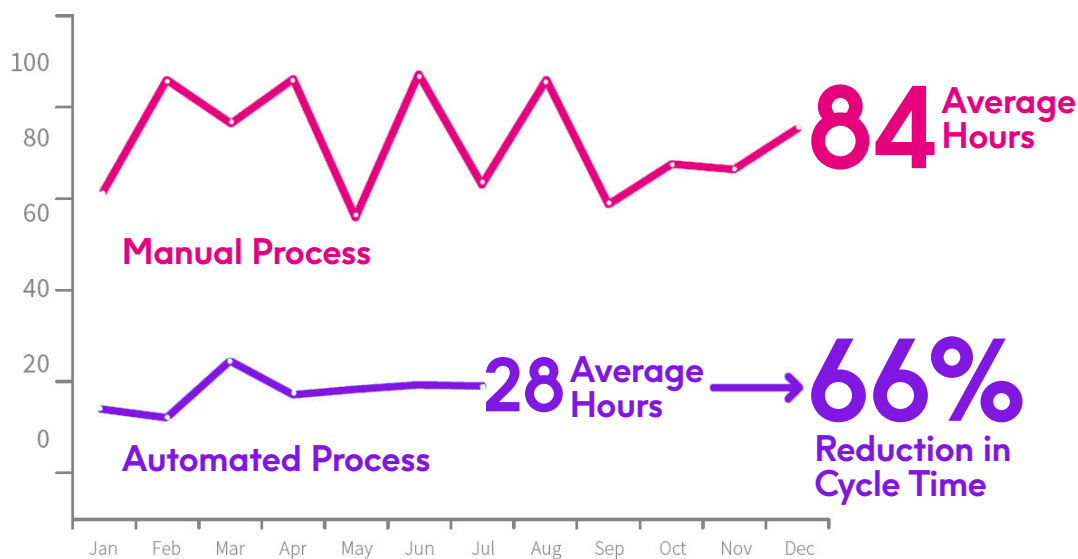
Patented

Import and export data from Excel

Process multiple records in the same form

SmartTable technology allows your team to process multiple records in a single request while improving data quality with extensive data stewardship capabilities.

Enable the business to go faster

Use Precisely Automate to build solutions that speed up key processes such as customer and vendor onboarding, new product launches, equipment creation, and much more. In many cases our customers reduce cycle times by 50% or more, making a big impact on the business.

Manual Process

84 Average Hours

Automated Process

28 Average Hours → **66%** Reduction in Cycle Time

Part of the reduction in master data creation and update cycle times comes by eliminating manual data entry via the SAP GUI. The table below shows average time savings for just a few of the common master data transactions regularly automated with Precisely Automate.

Master Data Transaction	Average Time Savings
XK01/02 - Vendor Create/Change	95%/77%
XD01/02 - Customer Create/Change	94%/78%
PA30 - Maintain Personnel Master Data	88%
MM01/02 - Create/Change Material	89%/77%
ME11/12 - Create/Change Purchasing Info Record	86%/83%
IE01/02 - Create/Change Equipment	96%/75%
CS01/02 - Create/Change Material Bill of Material	93%/83%
AS01/02 - Create/Change Asset	89%/75%
BP - Maintain Business Partner	80%

Get data right the first time with proactive data stewardship

High-quality master data is essential for making good decisions and avoiding costly downstream errors, and it's much better to prevent bad data getting into your system in the first place than fixing it later. Precisely Automate provides a full range of proactive data stewardship capabilities enabling you to:
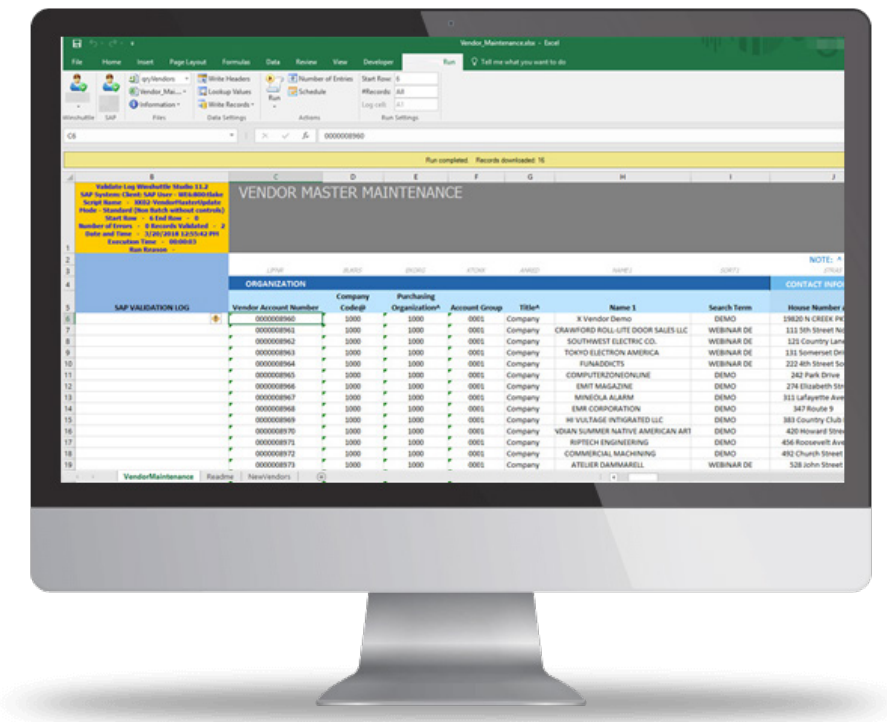
- **Reduce duplicates with built-in checks.** Give business users an easy way to check for duplicate records. Automate Evolve web forms support numerical, text and wildcard searches, making it simple to find records with live queries to SAP.

- **Add control with role-based form views.** Configure web forms with fields that are relevant to someone's role. Choose which fields business users can edit or view with the click of a checkbox.

- **Make choosing the right thing easy with configurable field values and SAP lookups.** Narrow down the available options for business users by defining pre-set values for form fields with drop-down lists and give users access to SAP F4 lookups directly from a web form or Excel workbook.

- **Provide the right data with form logic.** Use logic to design smart, flexible forms that help business users provide the right data. Present fields based on user input and pre-populate data to save time and improve data quality.

- **Save time and improve quality with 'copy from' functionality.** Populate data from existing records into web forms or Excel workbooks, before making necessary edits.

- **Validate data against your live SAP system.** Give business users the ability to check for data errors before submitting data to SAP. Any problems will be highlighted in the web form or Excel workbook so users can easily identify errors and correct data.

- **Make fields required—without the hassle.** Instantly make fields required in your web forms and eliminate holes in your data without going through the pain of making those fields required in SAP.

- **Improve data accuracy with third-party tools.** Integrate third-party web services, like address validation services, into your web forms to improve data consistency and accuracy.

Key Data Stewardship Capability	Excel	Web Form
Search for duplicates		✔
Smart form logic		✔
Role-based views		✔
Required fields		✔
Field standardization	✔	✔
Copy 'like' records	✔	✔
Live SAP validation	✔	✔
Modifiable field drop down values	✔	✔
SAP F4 lookups	✔	✔

Clean data up fast with reactive data stewardship

With Precisely Automate you have a couple of choices when it comes to fixing bad data that's already in your system. If multiple people are involved in updating your data, you can use Automate Evolve to build a workflow-enabled solution that makes it fast and easy to extract existing records, get the changes made, validate the data, and automatically post the clean data into SAP.

If you don't need workflow, use Automate Studio to build standalone Excel-based solutions that speed up finding and fixing your master data records.

Here's an example of an Excel-based solution built with Automate Studio to clean up vendor master data. You can quickly extract the records you want to change, validate the changes against your live SAP system, and post the new data with a few clicks.

Make an impact on your business at scale

We hope we've explained how the people in your business who know their data and processes the best, can use Precisely Automate to create solutions that streamline key processes and improve data quality—helping business get done faster and reducing downstream errors and business risk.

Rather than limiting this power to affect change to a few technical personnel, Precisely Automate empowers people across your business to make a difference—giving your business an edge, and leveraging your investment in your SAP infrastructure.

Use our SAP data management platform across your SAP landscape—both ECC and S/4HANA on premise—and see how you can fill the data management gap and impact your business at scale.

Use Precisely Automate across your SAP landscape

- **FI** - Financial Accounting
- **CO** - Controlling
- **SD** - Sales and Distribution
- **MM** - Materials Management
- **PM** - Plant Maintenance
- **AM** - Asset Management
- **PS** - Project Systems
- **PP** - Production Planning
- **QM** - Quality Management
- **HR** - Human Resources