Exercise 1 – Explore the Data management workspace

In this exercise, you will examine some of the features in the Data management workspace that have been discussed in this unit.

1. Go to **All workspaces > Data management**.
2. Select the **Templates** tile.
3. Refresh the page. Note if any templates are available.
4. Select the **Load default templates** button.
5. Select the **Load all** button.
6. In the list, find and select the desired record, such as **020 - GL Shared**.
7. View available entities for General ledger shared data.
8. In the list, find and select the desired record, such as **Supply chain management**.
9. View available entities for General ledger shared data.
10. Expand the Template details section.
11. In the list, find and select the desired record, such as **Barcode setup**.
12. Select the **Discover dependencies** button. This shows all dependencies of the selected entity.
13. Close the **Discover dependencies** page.
14. Close the **Templates** page.
15. Select **Data entities**. View available entities in the Finance and Operations.
16. Select any of the entities of your choice, such as **Accountants**.
17. Select **Entity structure** to see the data source. Here, you can enable or disable running business logic in your project. For instance, for data migration, you might have modified the settings of certain configurations to meet customer requirements; however, the legacy data would violate the new rule, so you might need to make the decision to turn off the rule for historical data.
18. Select **Target fields**. View and edit the target fields, such as enabling or disabling the Table configuration key status.
19. Close the **Target fields** page.
20. Close the **Entity structure** page.
21. Select **Entity model view**. This allows you to have better visibility by grouping entities for each category and sub category of nodes representing Module, and also by grouping the entity models.
22. In the tree, expand **All\AccountsPayable**.
23. In the tree, select **All\AccountsPayable\Transaction**.
24. In the tree, expand **All\GeneralLedger**.
25. In the tree, select **All\GeneralLedger\Document**.
26. Close the **Entity model view** page.
27. Select **Entity category view**.
28. In the tree, expand **All\Configuration**.
29. In the tree, select **All\Configuration\SystemAdministration**.

30. In the tree, expand **All\Reference**.
31. In the tree, select **All\Reference\AccountsReceivable**.
32. Close the **Entity category view** page.
33. Select the **Staging cleanup** tile.
34. In the **Entity** field, enter or select a value, such as **1099 fields**.
35. Select **OK**.
36. Select the **Data task automation** tile.
37. Select **Load default tasks** to open the drop dialog.
38. From the drop down, enter or select a value, such as **MS_Sample**.
39. Select **Load**.
40. Select **Cancel**.
41. Close the **Data task automation** page.
42. Select the **Configure data source** tile. Here, you can view, edit, and create data types such as CSV, Excel, and Package.
43. Close the page.

Exercise 2 - Export and import data to Finance and Operations

In this exercise, you will export some data and then import it to Finance and Operations.

1. Go to **All workspaces > Data management**.
2. Select **Export**.
3. In the **Name** field, type **Export Item groups**.
4. In **Source data format**, select **Excel**.
5. In the **Target data format** field, enter **Item groups**.
6. In the **Entity name** field, enter **Item groups**.
7. Select **Add entity**.
8. Select **Filter**.
9. In the **Criteria** field, enter or select **TV&Video**.
10. Select **OK**.
11. Select **Applicable legal entities**.
12. Select **New**.
13. In the **Data area** field, enter or select **USMF**.
14. Select **Save**.
15. Close the page.
16. Select **Export**.
17. Select **Close**.
18. Refresh the page.
19. Close the page.
20. Close the **Execution details** page.

21. Close the **Project** page.
22. In the list, select the highlighted **Export Item groups**.
23. Select **Download package**.
24. Select **Yes**.
25. Close the page.
26. Go to **Cost management > Inventory accounting policies setup > Item groups**.
27. Select **New**.
28. In the **Item group** field, type **Imported**.
29. In the **Name** field, type **Item group**.
30. Select **Save**.
31. Close the page.
32. Go to **All workspaces > Data management**.
33. Select **Import**.
34. In the **Name** field, type **Import Item groups**.
35. In **the Source data format** field, enter or select **Package**.
36. Select **Import**.
37. Select **Close**.
38. Refresh the page.