



Hands-On Experience on SAP Master Data Governance, cloud edition DAT162

Exercise 3 Consolidation

Sungmin Kim, Carsten Köhler, Andreas Seifried, Michael Veth / SAP SE

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This exercise is part of the SAP TechEd 2021 workshop *DAT162 Hands-On Experience on SAP Master Data Governance, cloud edition*. All workshop materials are available in the github.com repository [SAP-samples/teched2021-DAT162](https://github.com/SAP-samples/teched2021-DAT162).

BEFORE YOU START

In **exercise 1** you have subscribed to SAP Master Data Governance, cloud edition. With that you can access the Fiori launchpad with all required Fiori apps.

Objective of this Exercise

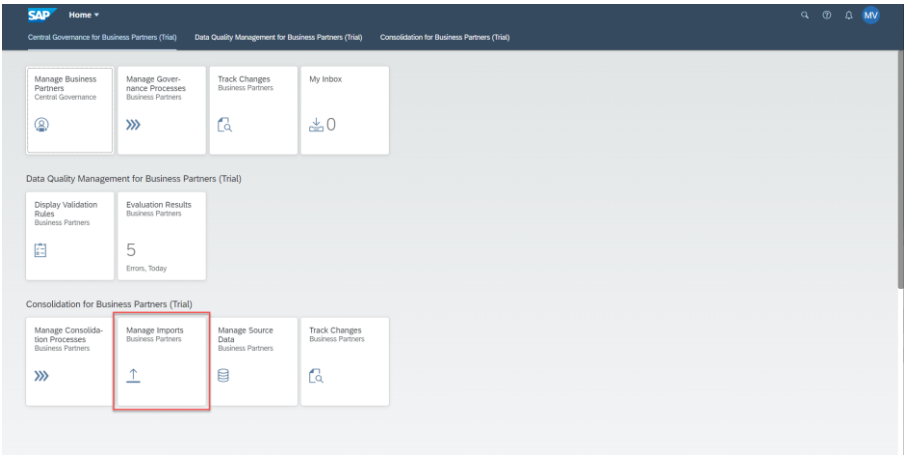
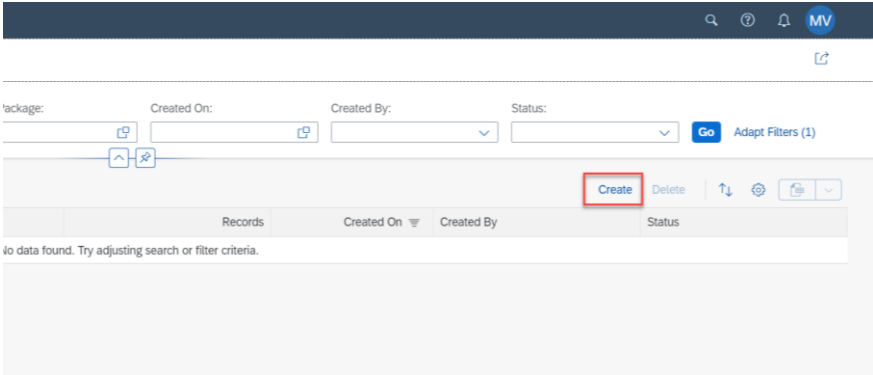
In this exercise, you will learn the basics for working with the consolidation capabilities of SAP Master Data Governance, cloud edition. You will start with the import of source data in spreadsheet format and the creation of a consolidation process. Then you will examine the results of each process step. Furthermore, you will learn how to use the match review to understand the result of matching and how to work with match groups and the result of the best record calculation.

Estimated time: 20 minutes

Instructions

Step 1: Import Spreadsheet File

You have some customer data with addresses and phone numbers in a spreadsheet file. You can upload this file into the system using the *Import Fiori App*.

Explanation	Screenshot
1. Open the Fiori app Manage Imports	
2. Click on Create to create a new import of the data.	

3. Select the flag **Import without Source System**.

Hint: Only in case of required key mapping, you should maintain the source system, where the source data is coming from. This is required to replicate the data back to the source system.

< SAP Import

New: Import

Created By: Status Records
Created On: 11/03/2021, 13:25:32 Draft 0

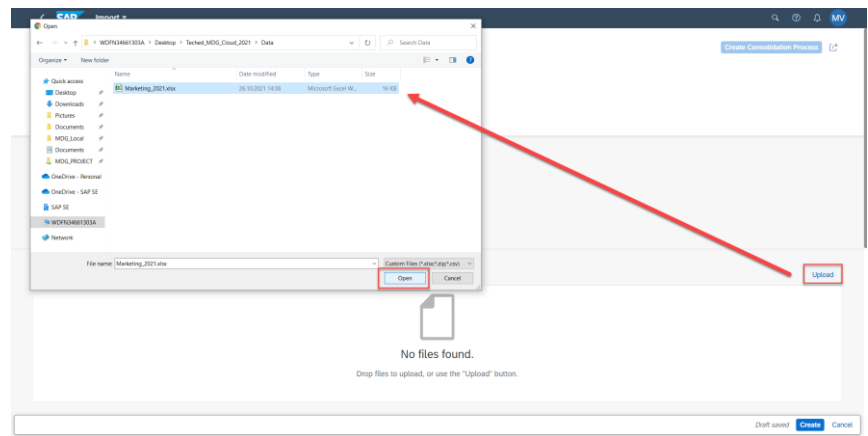
General Information File Import Log

Source System: ☒ Import without Source System
Data Package: 1277
[Download File Templates](#)

File

Uploaded File

4. Click on **Upload** and select the spreadsheet file. After that click on **Open**.



5. Click on **Create** to start the import process.

< SAP Import

Marketing_2021.xlsx

Created By: Status Records
Created On: 11/03/2021, 13:25:32 Draft 0

General Information File Import Log

Source System: ☒ Import without Source System
Data Package: 1277
[Download File Templates](#)

File

Uploaded File

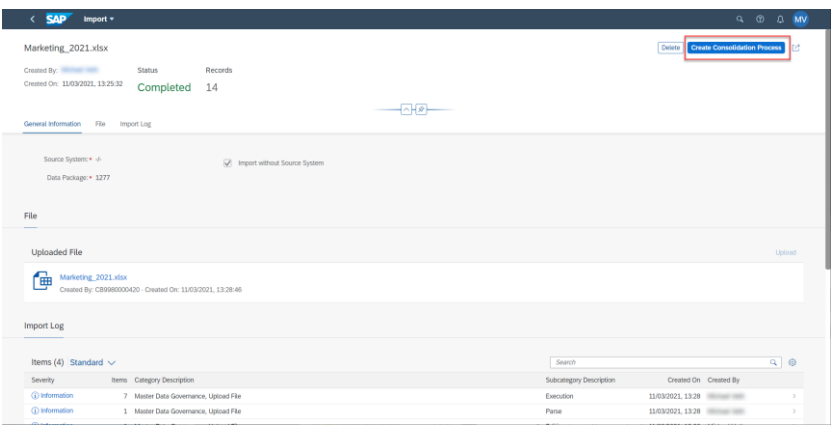
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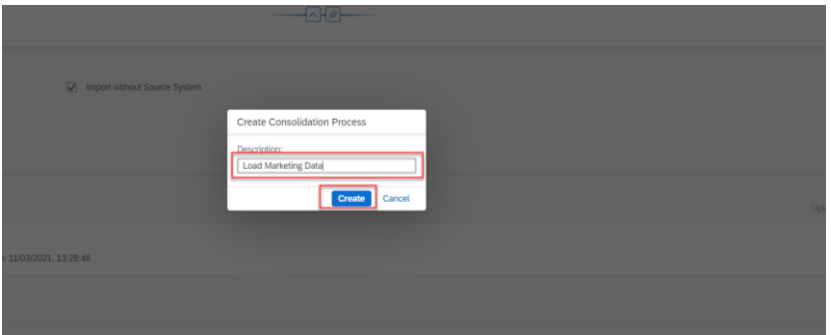
Items (0) Standard

Severity Items Category Description Subcategory Description Created On: Created By: Draft saved Create Cancel

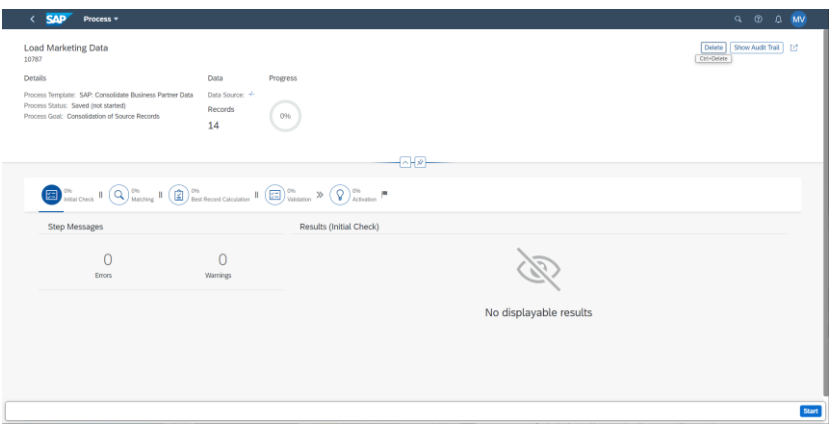
6. Wait until the import has been finished and click on **Create Consolidation Process**.



7. Input a description and click on **Create**.

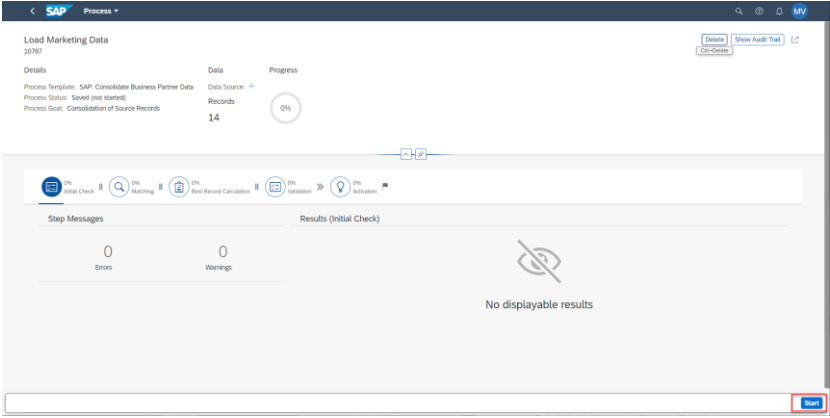
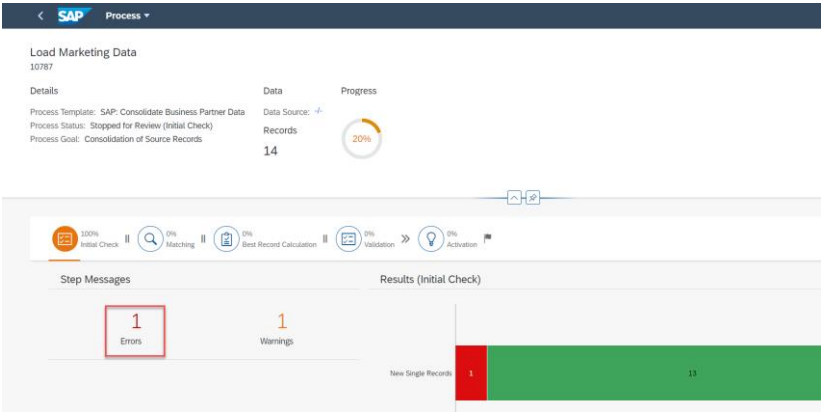
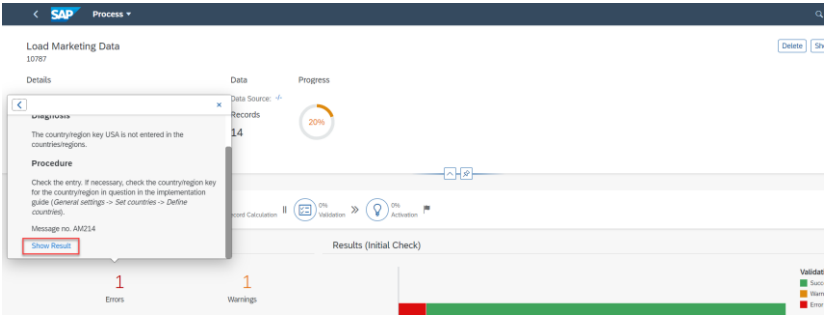


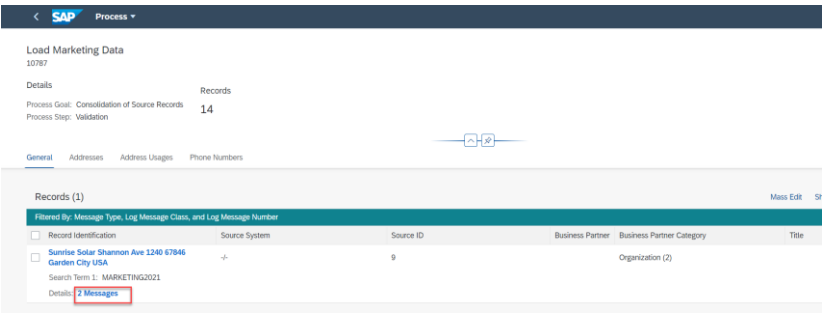
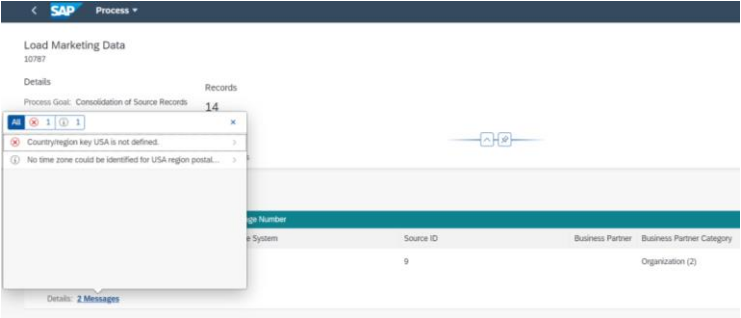
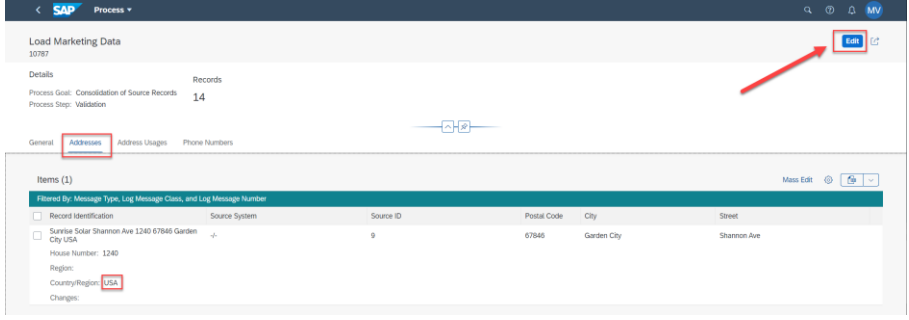
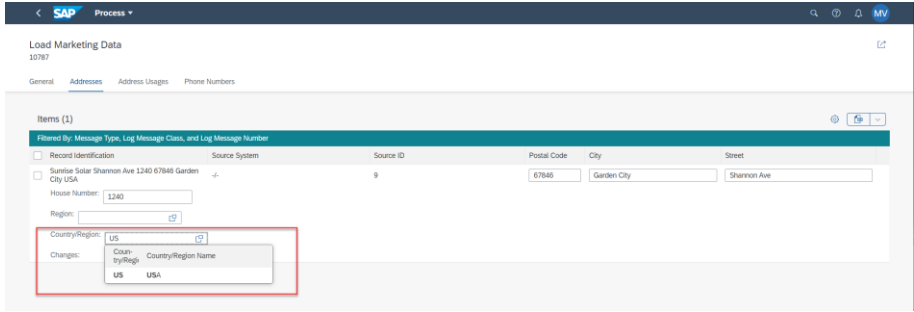
8. The spreadsheet file has been imported and a consolidation process has been created.

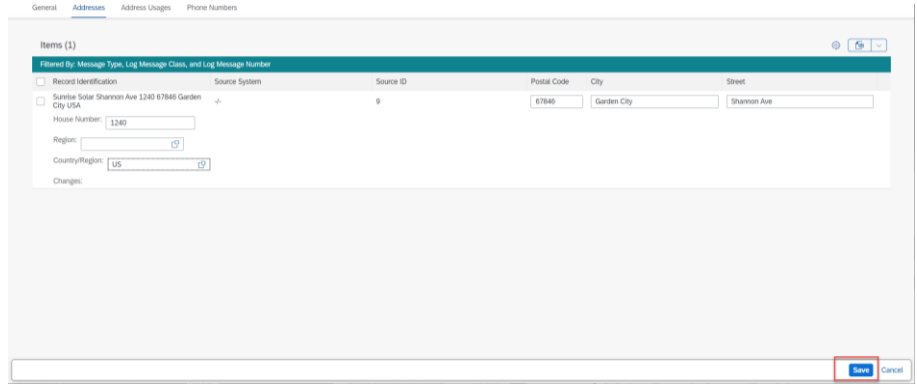
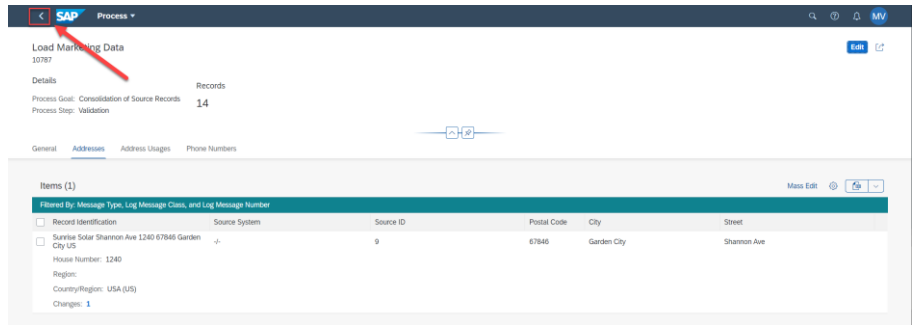
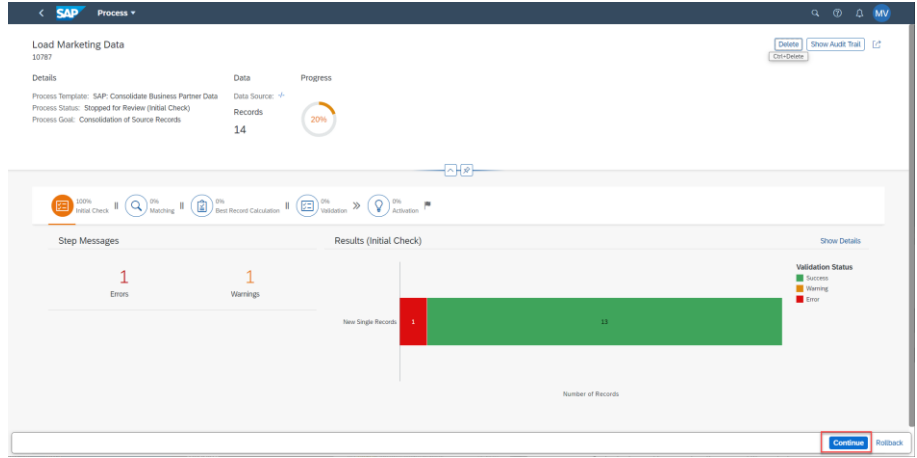


Step 2: Run Consolidation Process

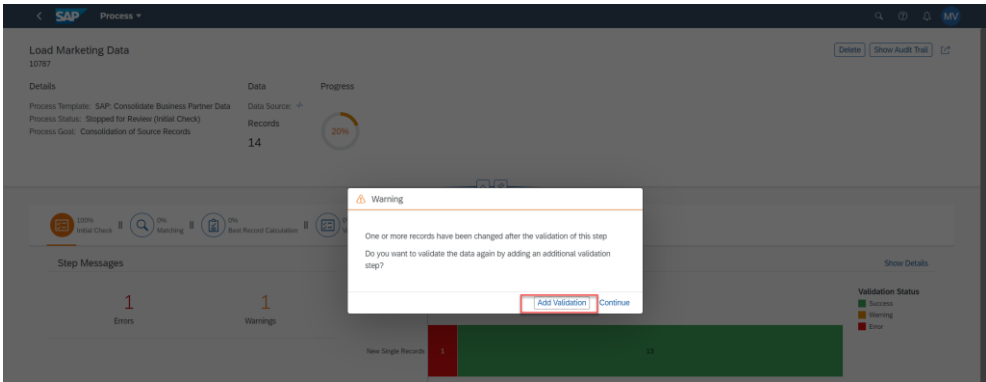
After importing the data from a spreadsheet file, you start a consolidation process. After an initial check you make some manual changes, before you run the matching step to identify duplicates. After a match review the best record calculation will merge the data of a match group. The validation and activation step will bring the loaded data into the system. After finalizing the process, you are able to check all actions inside this process using the audit trail functionality.

Explanation	Screenshot
1. Click on Start to run the consolidation process.	
2. The first step <i>Initial Check</i> has been finished and raises an error. Check this error by clicking on the number of errors .	
3. The system reports about a wrong country code. Scroll down in the popup window and click on Show Result to navigate to the affected record.	

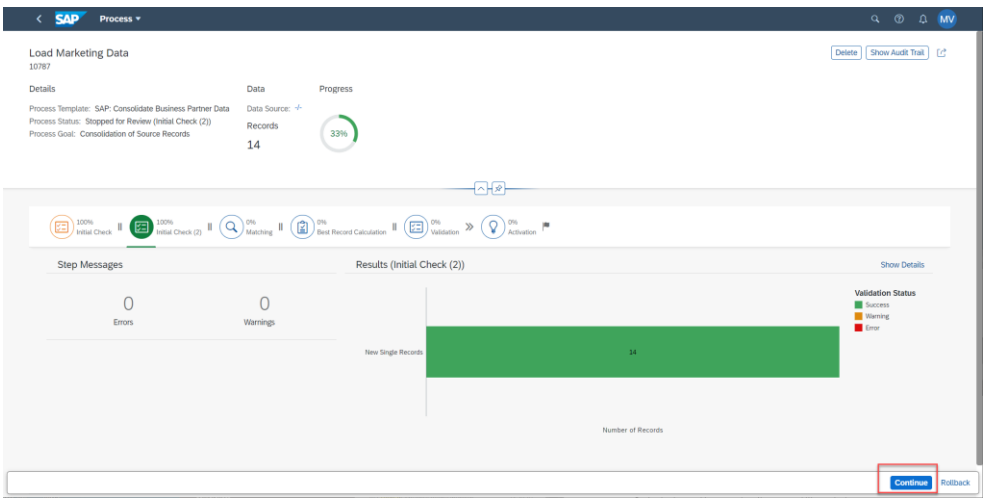
<p>4. The system shows the affected record. You can click on the 2 Messages link to show the detailed message information.</p>	
<p>5. The error message is shown. The country key USA is not defined. Close the popup and navigate to the address tab.</p>	
<p>6. To correct the wrong country key, click on Edit.</p>	
<p>7. Input US and the system shows a suggestion. Accept US as country key.</p>	

<p>8. Click on Save.</p>	
<p>9. Click on the back icon to navigate back to the process UI.</p>	
<p>10. Click on Continue to run the next step.</p>	

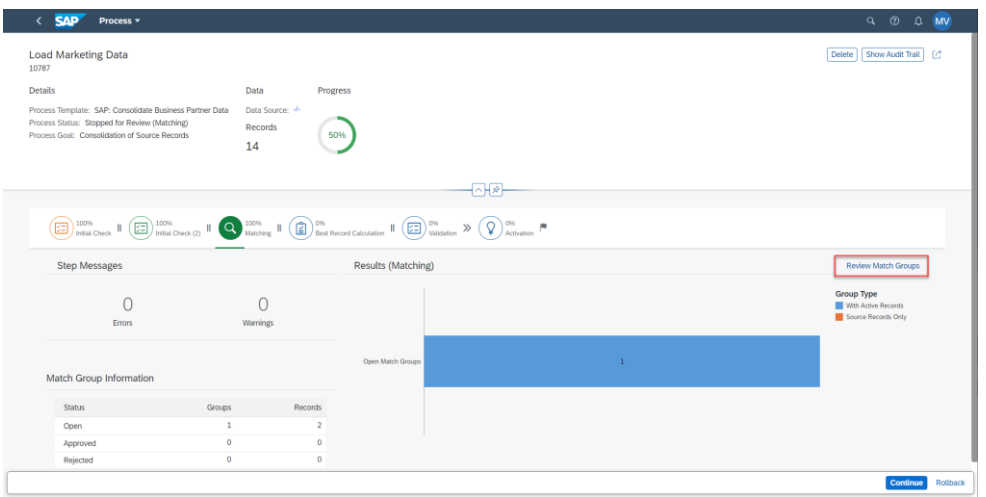
11. The system identified manual changes and proposes to validate again. Click on **Add Validation**.

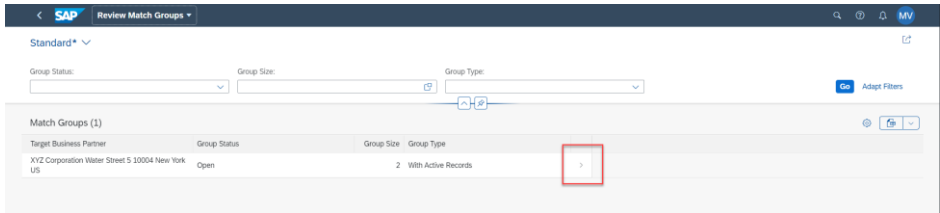

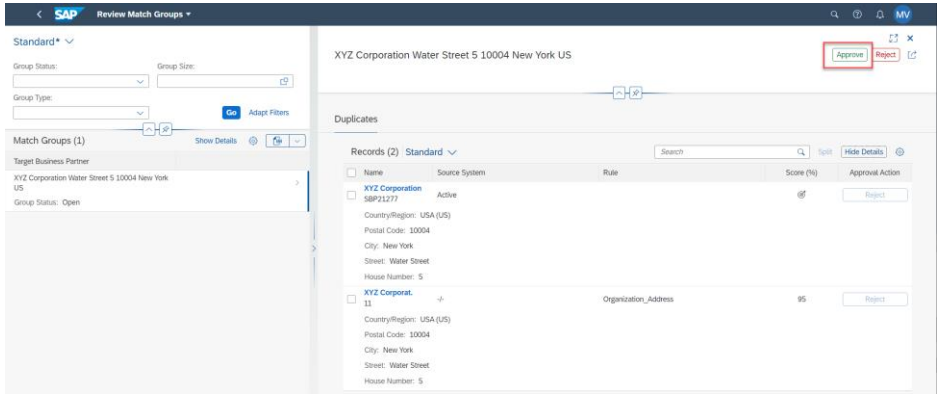
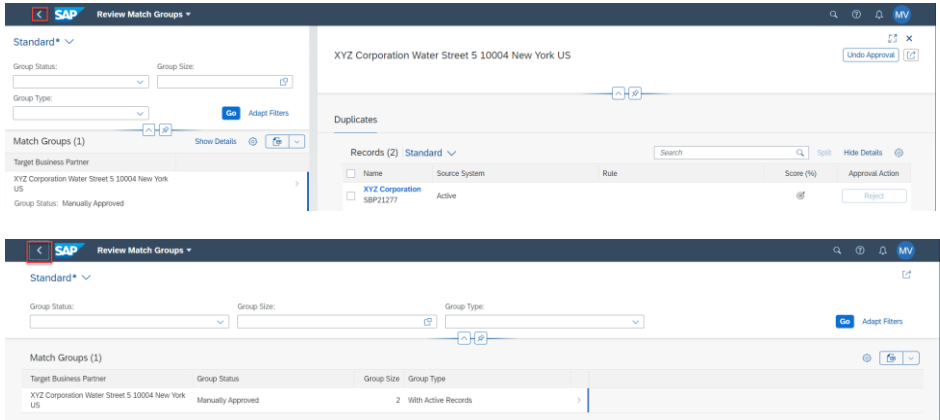


12. The error could be corrected, and the additional validation step has been run successfully. Click on **Continue**.

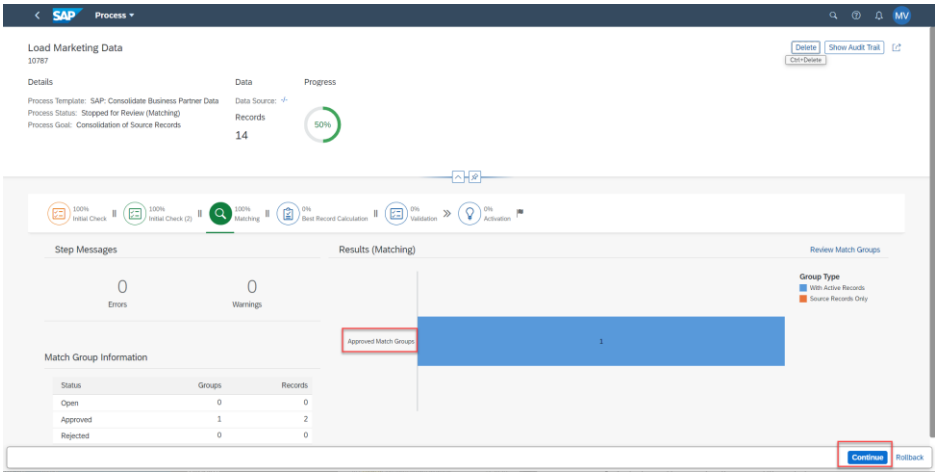


13. In the matching step the system detected a potential duplicate. Click on **Review Match Groups** to review the match result.

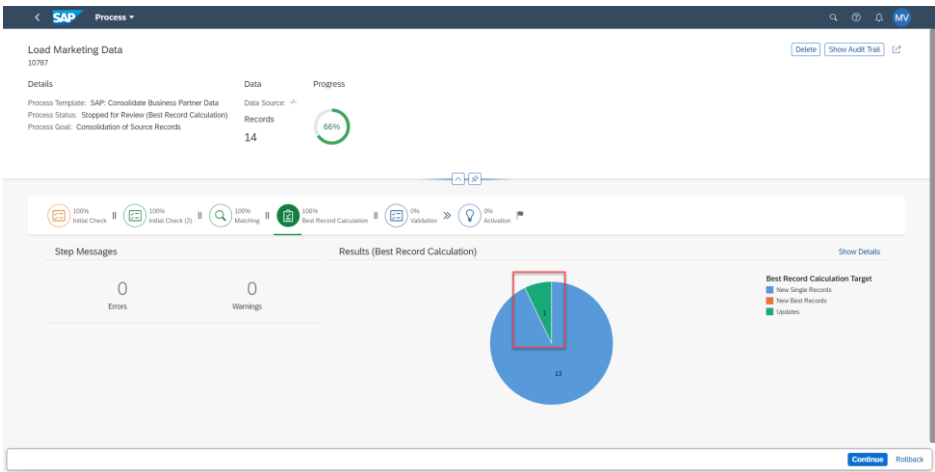


14. The system shows a match group. Select this match group.	
15. You can compare the potential duplicates. Click on Show Details to show all attributes.	
16. It seems to be a real duplicate. Click on Approve to confirm this match group.	
17. Click two times on the back icon to navigate back to the process UI.	

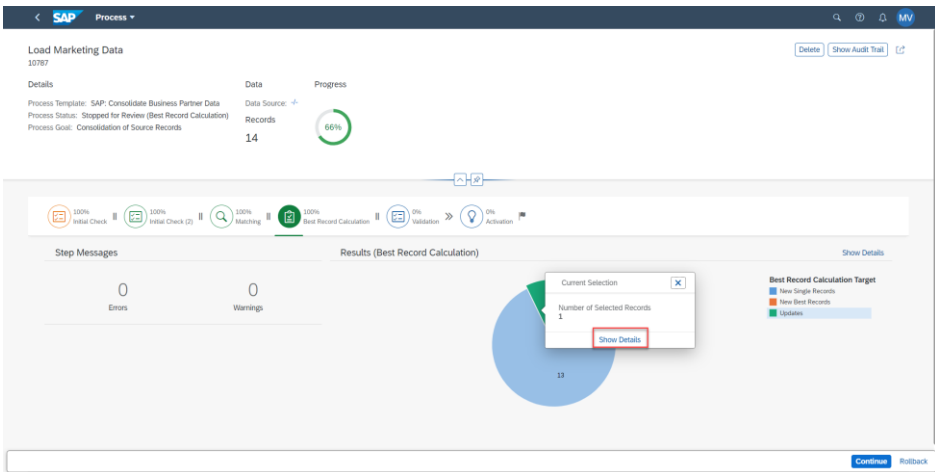
18. Now you see that the match group has been approved. This will lead to a merge of the records in this match group.
Click on **Continue** to merge the data in the best record calculation.

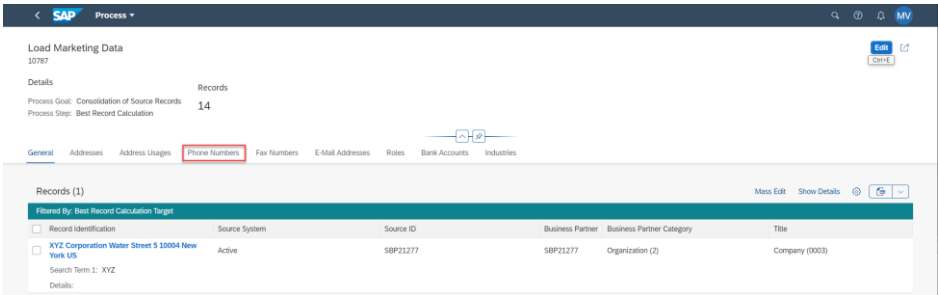
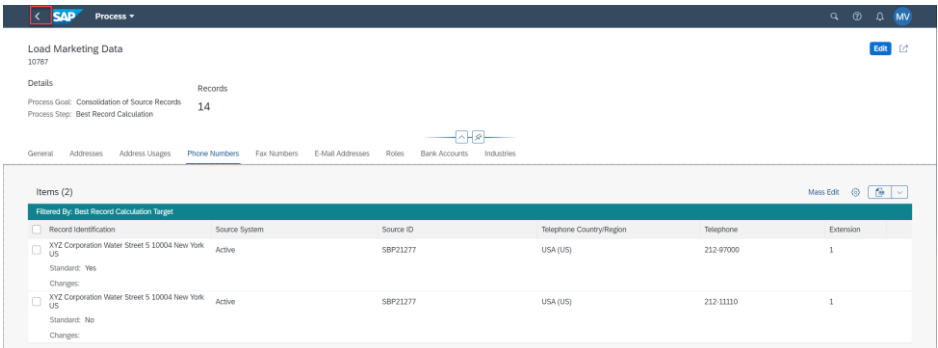
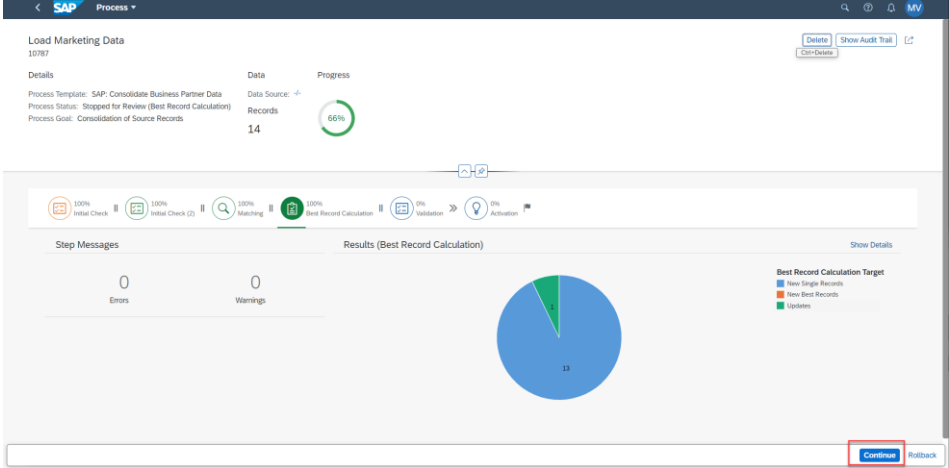


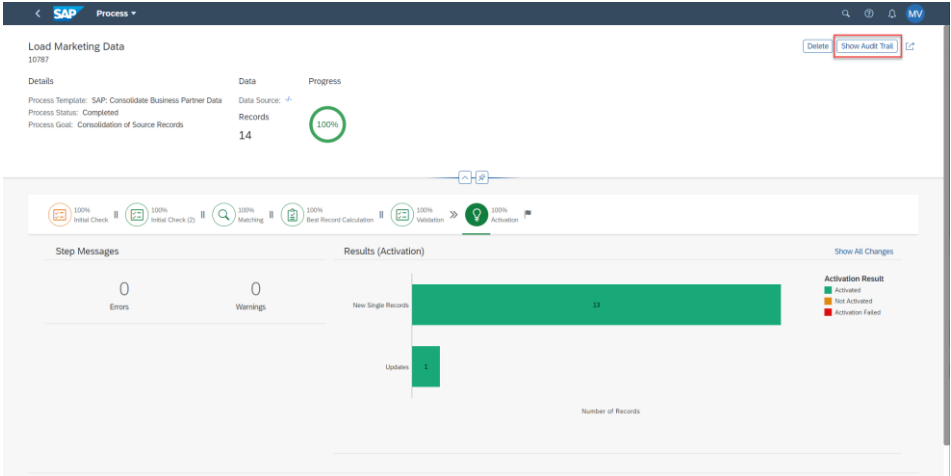
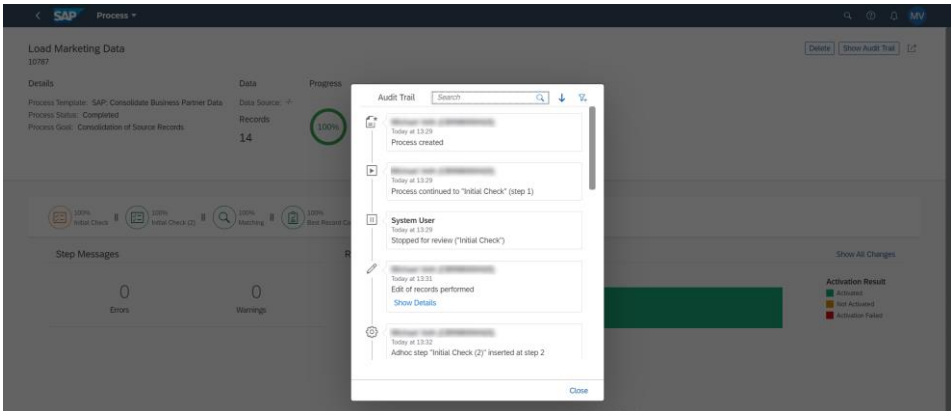
19. You see the one record, which will be handled as update in the best record calculation.
Click on the **Updates** segment in the chart.



20. Click on **Show Details** to display the data.



<p>21. Click on Phone Numbers to check the phone data.</p>	
<p>22. You see two phone numbers. One was already existing in the active record, the other one has been merged from the loaded data. Click on the back icon to navigate back.</p>	
<p>23. Click on Continue to validate and activate the data of this process.</p>	

<p>24. The data has been activated successfully. Click on Audit Trail to check all actions of this consolidation process.</p>	 <p>The screenshot shows the SAP Process 'Load Marketing Data' (ID 10787) in a 'Completed' state. The progress bar indicates 100% completion. The process goal is 'Consolidation of Source Records'. The 'Results (Activation)' section shows a bar chart with 14 records: 13 'New Single Records' and 1 'Update'. The 'Step Messages' section shows 0 errors and 0 warnings. The 'Activation Result' legend indicates that all records are 'Activated'.</p>
<p>25. You see all relevant actions.</p> <p>Congratulations! You finalized a consolidation process in SAP Master Data Governance, cloud edition.</p>	 <p>The screenshot shows the same SAP Process 'Load Marketing Data' (ID 10787) with the 'Audit Trail' dialog box open. The dialog box displays a list of actions performed during the process, including 'Process created', 'Process continued to "Initial Check" (step 1)', 'Stopped for review ("Initial Check")', 'Edit of records performed', and 'Adhoc step "Initial Check (2)" inserted at step 2'. The background shows the same process details and results as the previous screenshot.</p>

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