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

DAT162

Exercise 2
Central Governance

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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.

BEFORE YOU START

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

Objective of this Exercise

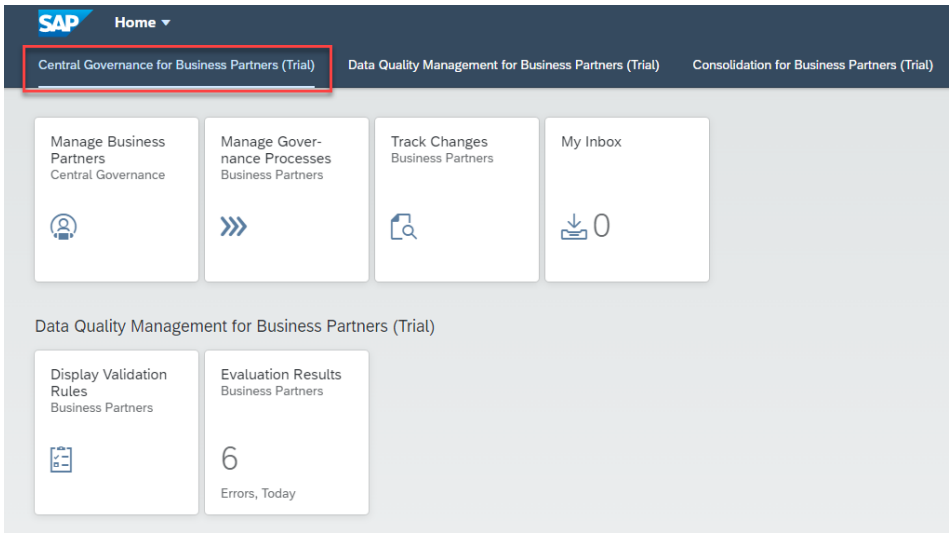
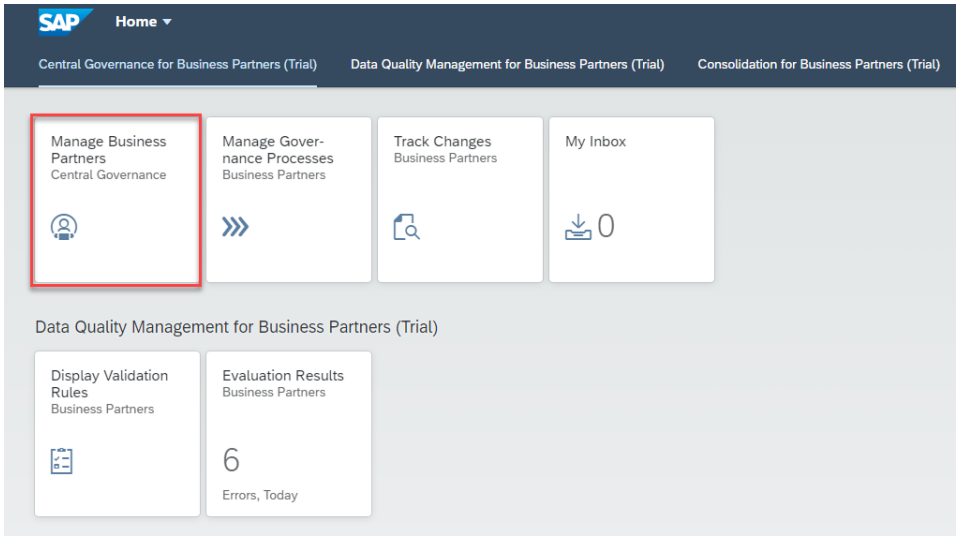
In this exercise, you will learn the basics for working with the central governance capabilities of SAP Master Data Governance, cloud edition. You will start by creating a business partner. Then you will execute a check for duplicates to check whether there are any possible duplicates in the system. You will create a business partner with different data sets, such as address, role, bank data, identification. Then you submit your request for approval. For this exercise you have assigned yourself as approver by adding your ID to the role collection MDG_Workflow_User in BTP cockpit. You have done this as part of exercise 1. Once your request is approved, you will get an email notification.

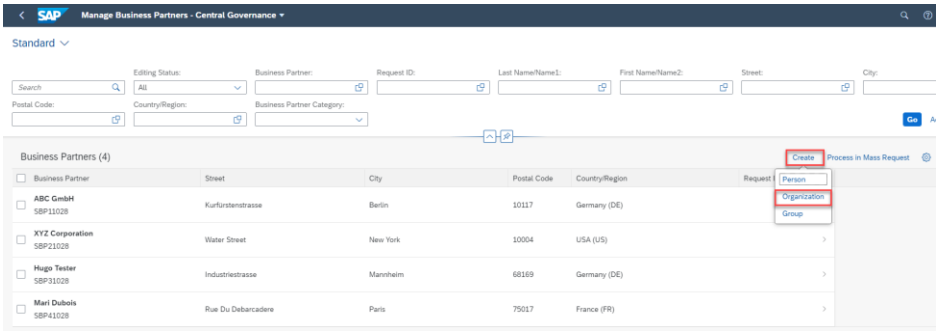
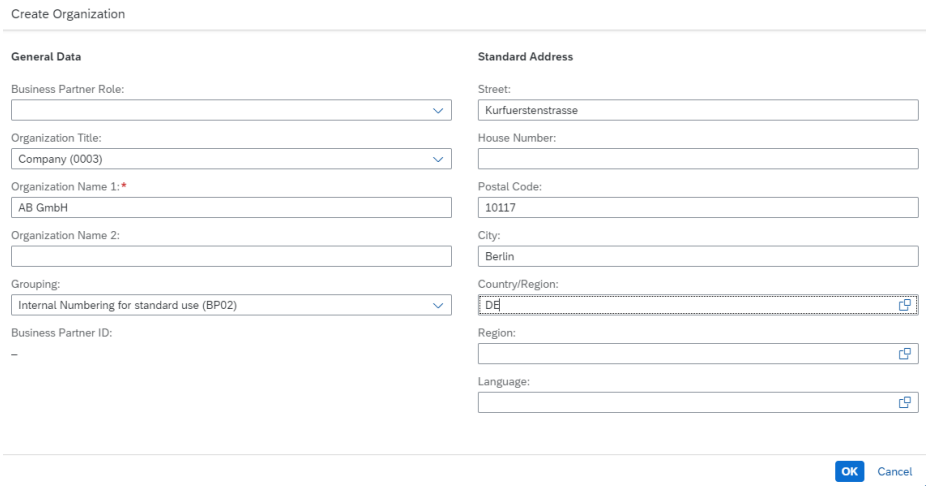
Estimated time: 20 minutes

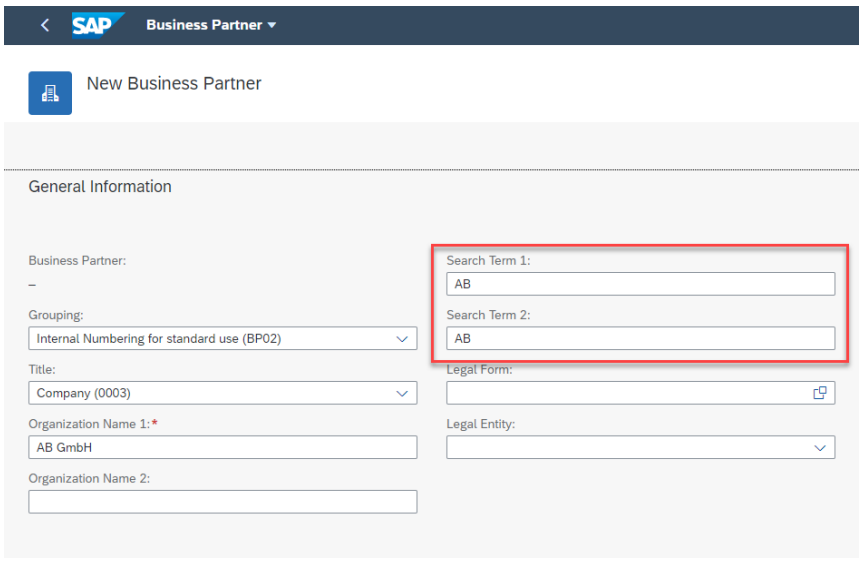
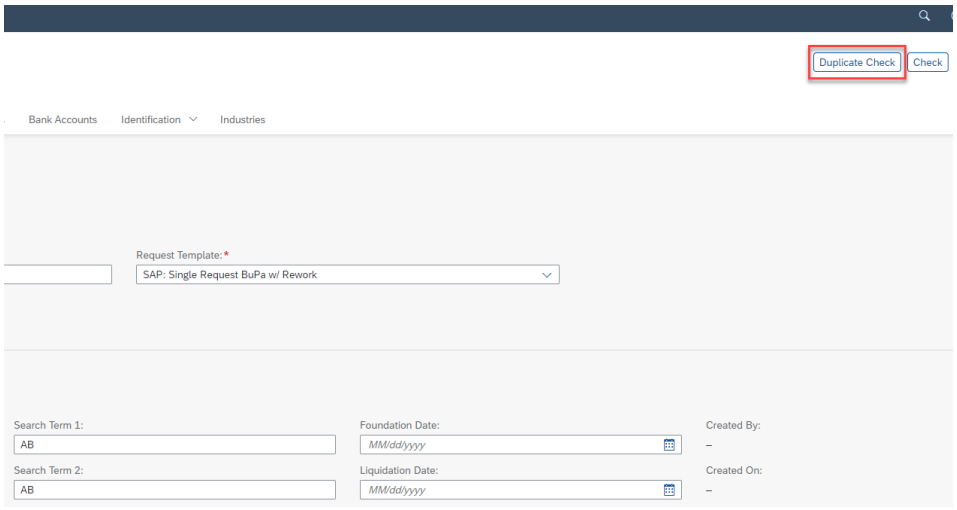
Instructions

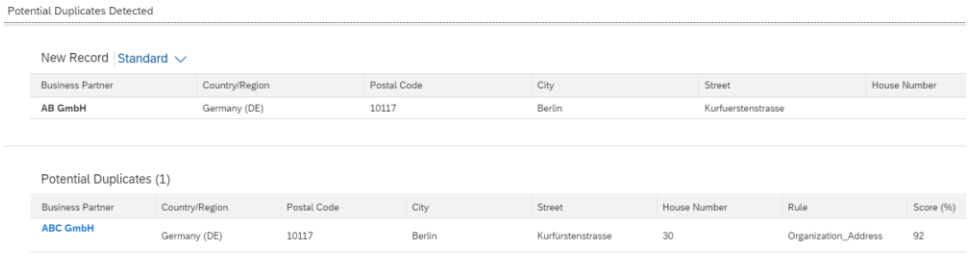
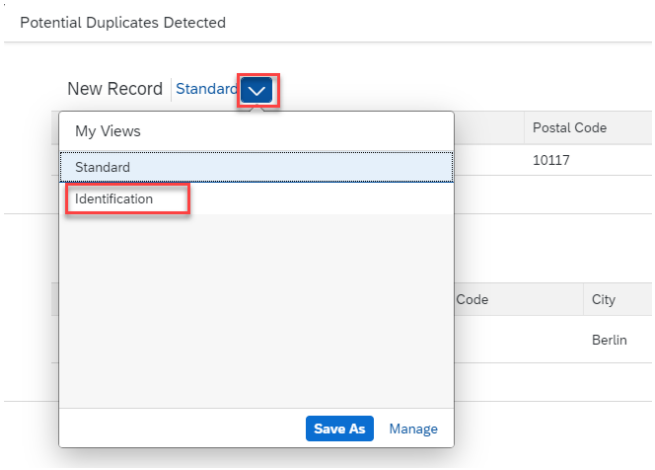
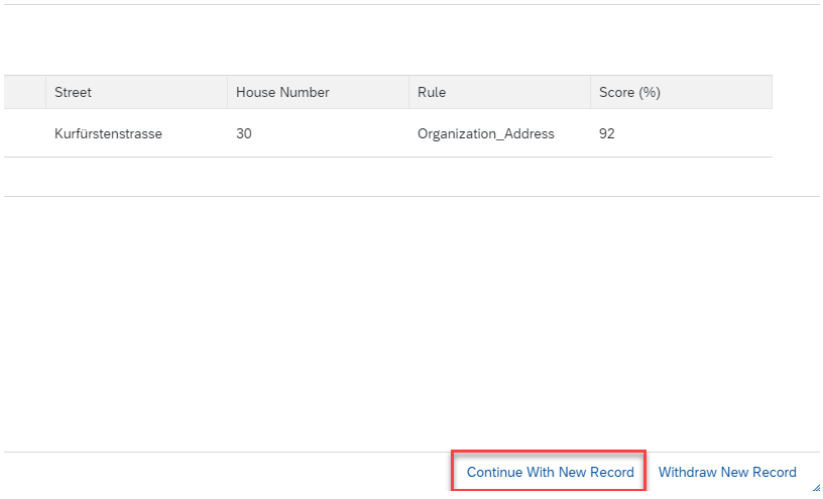
Step 1: Create Business Partner

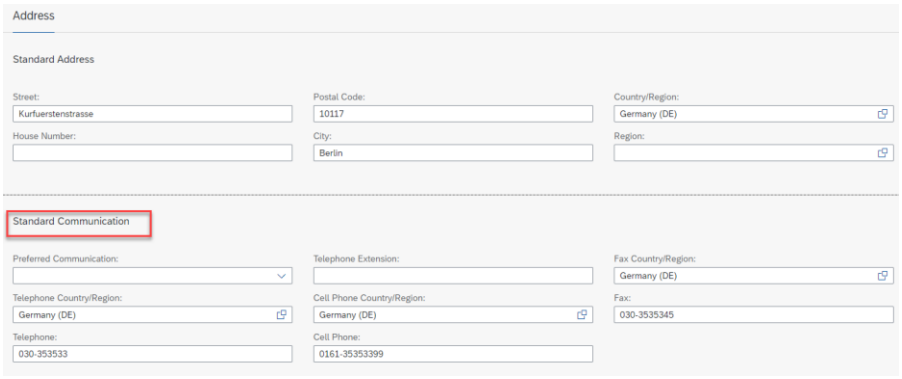
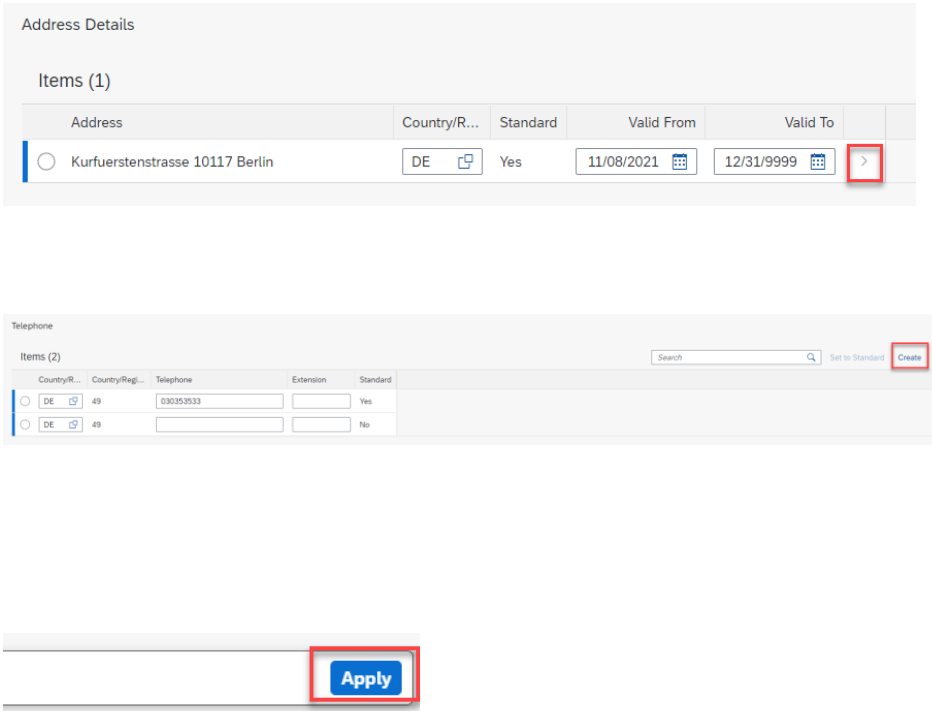
You create a business partner with different data sets, including address, role, bank data, identification and submit your request.

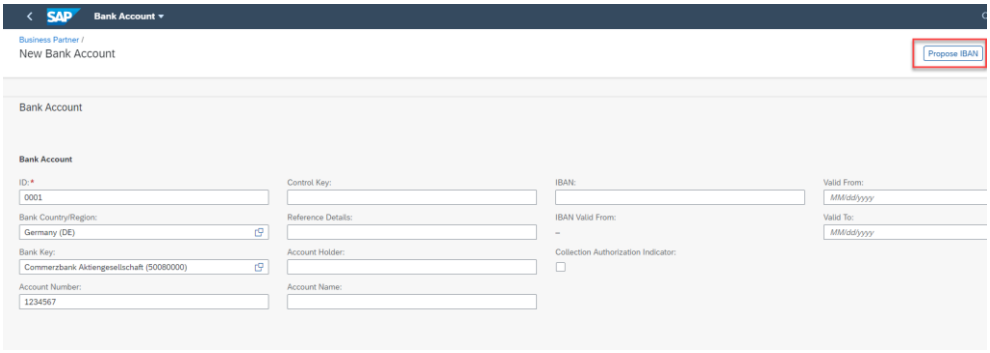
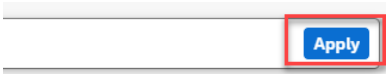
Explanation	Screenshot
1. Open the group ***Central Governance for Business Partner (Trial)***	
2. Click on the Fiori tile ***Manage Business Partners – Central Governance.***	

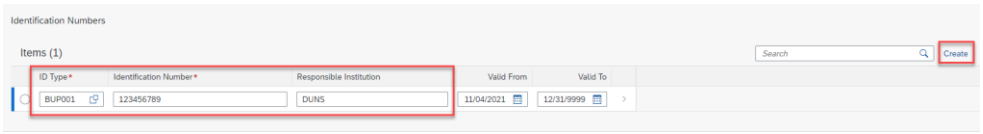
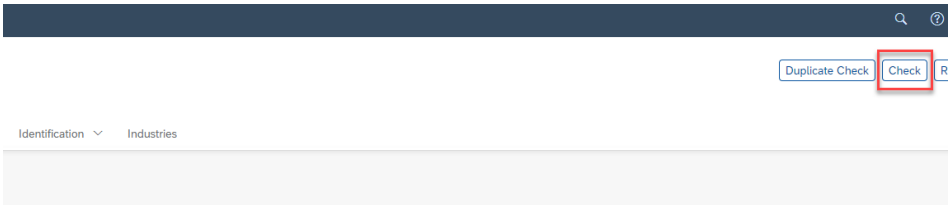
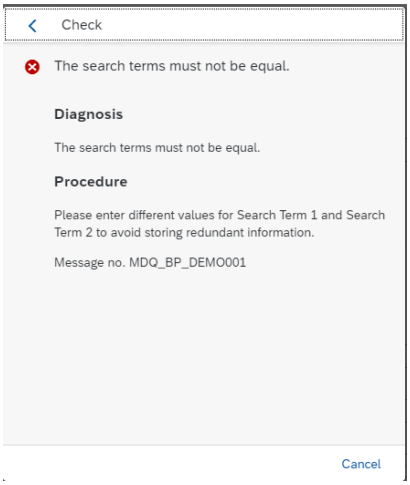
Explanation	Screenshot
3. Click on the ***Create*** button and select ***Organization*** in the list.	
4. Quick Create dialog is open. Enter following information: a) Organization Title: ***Company (0003)*** b) Organization Name1: ***AB GmbH*** c) Street: ***Kurfuerstenstrasse*** d) Postal Code: ***10117*** e) City: ***Berlin*** f) Country/Region: ***DE*** Then, click on ***OK*** button.	

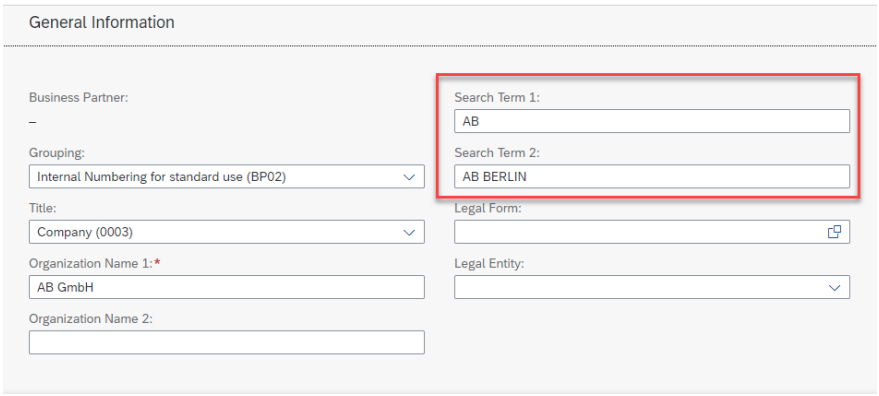
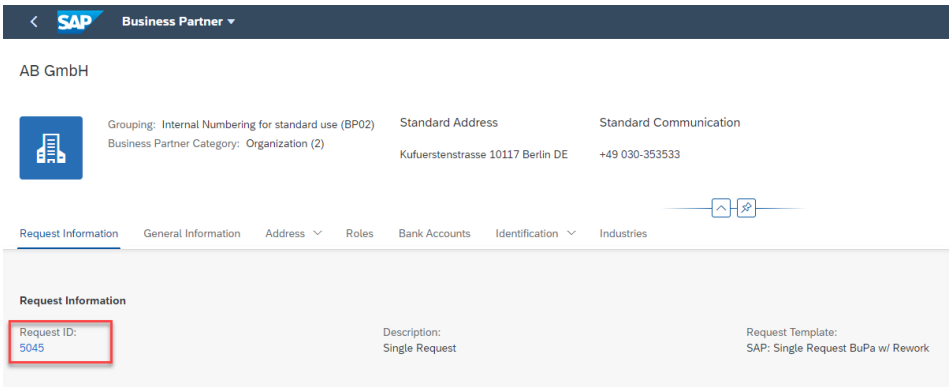
Explanation	Screenshot
5. In the General Information, enter Search Term 1 and Search Term 2 as following: a) Search Term 1: ***AB*** b) Search Term 2: ***AB***	
6. On the upper right corner, click on the ***Duplicate Check*** button to check potential duplicates.	

Explanation	Screenshot
7. In case any potential duplicates are detected, a dialog will be open and displays two tables view. *New Record* describes the Business Partner which you are working on. *Potential Duplicates* shows detected duplicates in the system with match score in percentage.	
8. The variant 'Standard' displays the address data. You can also select 'Identification' to compare identification data such as Tax Number, Identification Number.	
9. To continue working with new record, click on the ***Continue With New Record*** button. By clicking on the *Withdraw New Record* button, the new record will be deleted and come back to the search page of Manage Business Partners.	

Explanation	Screenshot
10. In the *Standard Communication* section, you can enter some communication data such as telephone number, fax number, email address, URL, etc.	
11. In case you want to create more communication data, e.g. additional telephone number, then go to address details page. By clicking on ***Create*** button of each communication section, you can create more data. Note that, if more than one communication data, e.g. two telephone numbers are entered, one entry should be standard. As default, the first entry is set as standard. You can change the standard by using ***Set to Standard*** button. This button will be abled when you select on communication data. Click on the ***Apply*** button to back to the business partner page.	

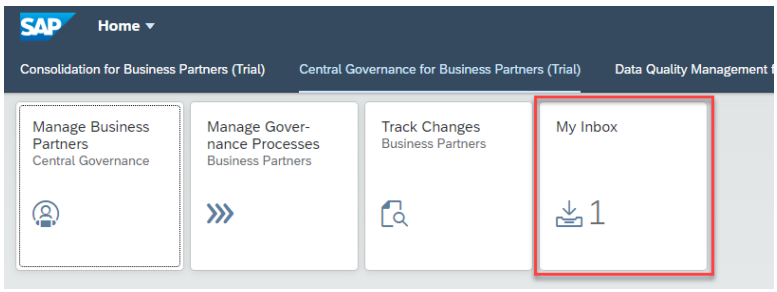
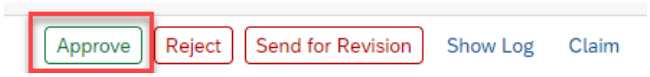
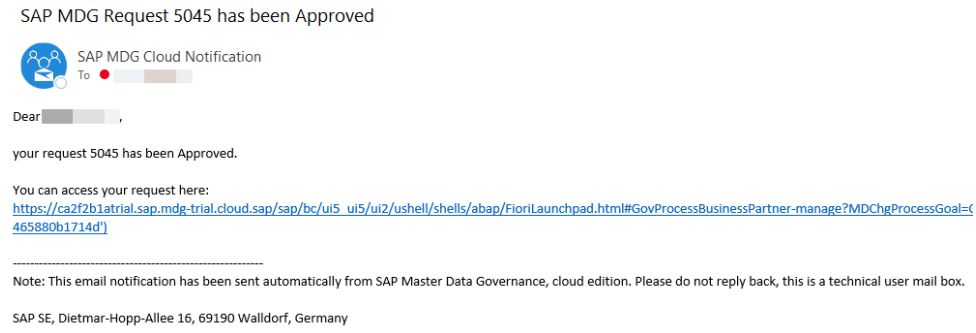
Explanation	Screenshot
12. In the Roles, click on the ***Create*** button. A new line will be created. In the dropdown list, select ***Prospect (BUP002)***.	
13. Go to Bank Accounts and click on the ***Create*** button. It navigates to Bank Account details page. Select Bank Country/Region: ***Germany (DE)***. Enter Bank Key using F4 Help: ***Commerzbank Aktiengesellschaft (50080000)*** Enter a meaningful ***Account Number***. In the upper right corner click on the ***Propose IBAN***. This calculates IBAN automatically and fills the IBAN data based on the bank data. Click on the ***Apply*** button.	 
14. Go to Tax Numbers and click on the ***Create*** button. Select Tax Category, e.g. ***DE0*** and enter Tax Number e.g. ***DE123456789***.	

Explanation	Screenshot
15. Go to Identification Numbers and click on the ***Create*** button. Select ID Type and enter Identification Number as well as Responsible Institution. ID Type: ***BUP001*** Identification Number: ***Any number*** Responsible Institution: ***Name of institution***	
16. Go to Industries and click on the ***Create*** button. Select Industry System and Industry using F4 Help.	
17. To check data set, click on the ***Check*** button in the upper right corner. If any data violates the rule, a warning or error message will be displayed. In this exercise, an error message about search terms will be shown. Close the message box. Note that the rule is customer specific defined. User can define any other rules in the Data Quality Management.	 

Explanation	Screenshot
18. Go to General Information and change ***Search Term 1*** and ***Search Term 2***, so that the search terms are not equal. You can also click on ***Check*** button again and check that there is no other error message.	
19. On the bottom line, click on the ***Save and Submit***. Your request will be saved and submitted to approver. Alternatively, you can save by clicking on *Save* button and click on *Submit* button on the upper right corner.	
20. Your business partner will be saved, and you can see the Request ID in the Request Information. Click on the SAP logo to come back to Home.	

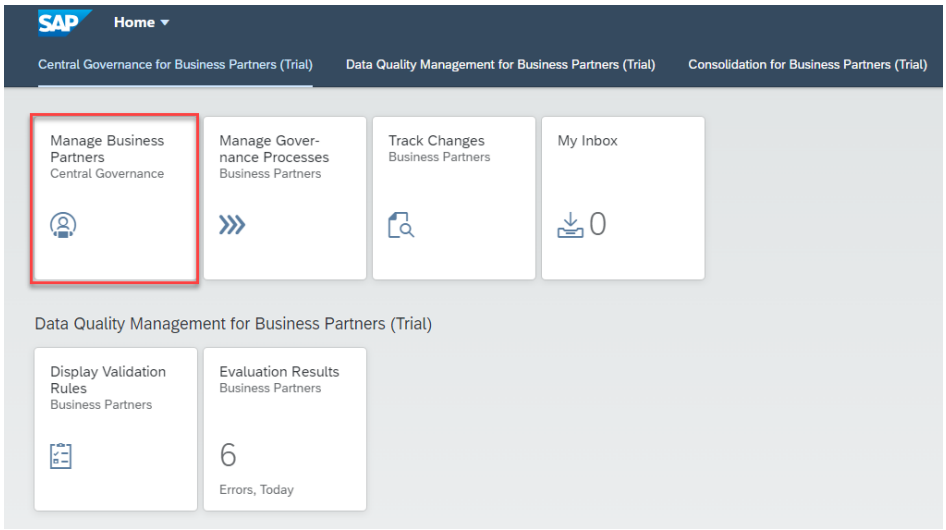
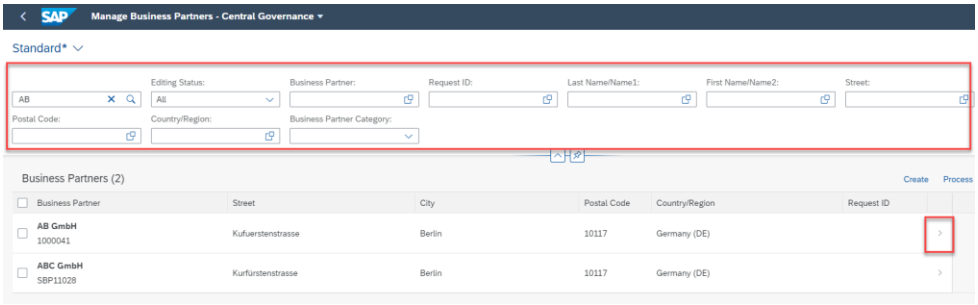
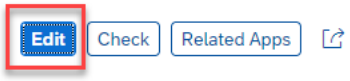
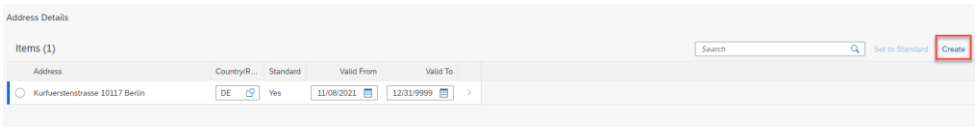
Step 2: Approve Business Partner

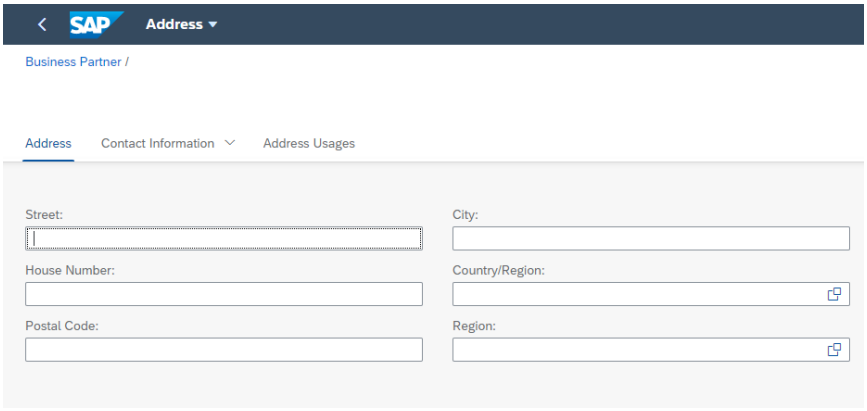
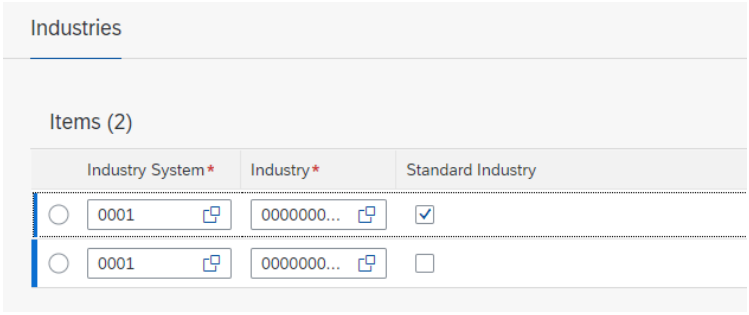
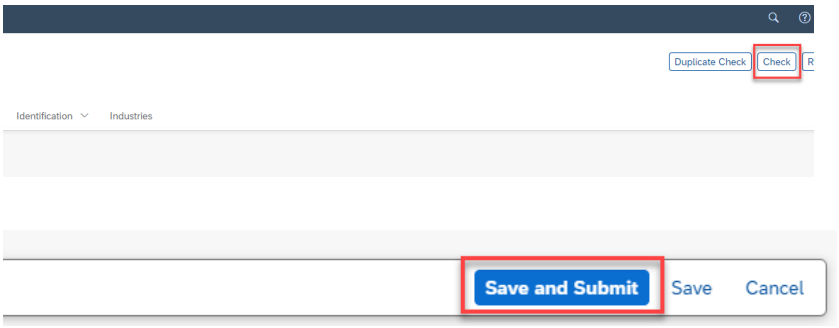
In the previous step, you submitted a request to create a business partner. In this exercise you play the approver role as well. Being also the approver, you will get a workflow task in your workflow inbox. You check your workflow inbox and approve the request.

Explanation	Screenshot
1. Open the group ***Central Governance for Business Partner (Trial)*** and click on the Fiori tile ***My Inbox.*** You can see the number of inbox items.	
2. Your request will be displayed. Check your data whether all data set are correctly displayed. On the bottom line, click on ***Approve*** button to approve the request. After the request has approved successfully, your working item will be deleted. Approver has also options to reject the request or send the request back to the requestor to revise some data.	
3. You will get an email notification. Please check your email inbox. By clicking on the request link, you will navigate to the process directly.	

Step 3: Change Business Partner

You search for your business partner that you created in the previous step and change this business partner. You create one additional address and add one industry section.

Explanation	Screenshot
1. Open the group ***Central Governance for Business Partner (Trial)*** and click on the Fiori tile ***Manage Business Partners – Central Governance***	
2. Search your business partner that you created in the previous step. You can use search field such as free text field, name, address, etc. Search result shows business partners. Find your business partner ***AB GmbH*** and click on the **>** icon to go into single request.	
3. Your business partner will be displayed. Click ***Edit*** button in the upper right corner.	
4. Go to Address Details table and click on the ***Create*** button. It navigates to address details page.	

Explanation	Screenshot
5. Enter additional address data such as street, house number, postal code, city and country/region. You can also enter communication data as previous step. Go back to the business partner by clicking on ***Apply*** button. Note that, when more than one addresses are entered, one address should be standard. As default, the first address is set to standard. You can change the standard address by using ***Set to Standard*** button.	
6. Go to Industries. Click on the ***Create*** button and create one more industry. You can set one industry as standard. Only one industry can be set as standard for each industry system.	
7. Click on ***Check*** button in the upper right corner. If there is no issue, click on the ***Save and Submit*** button. Your change request will be saved and sent to the approver.	
8. Repeat ***Step 2 Approve Business Partner*** to approve the change request.	

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