




## **DA160 – Hands-On Experience with SAP Master Data Governance, cloud edition**

Exercise 3  
Upload and Consolidate Business Partner Data



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This exercise is part of the SAP TechEd 2023 workshop *DA160 Hands-On Experience with SAP Master Data Governance, cloud edition*. All workshop materials are available in the github.com repository [SAP-samples/teched2023-DA160](https://github.com/SAP-samples/teched2023-DA160).

***Prerequisites***

You have logged on to the tenant dedicated to your group. Please verify that your group's number fits to the URL displayed in the browser.

You created a business partner in the previous exercise. This business partner will also be used in this exercise.



### ***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.**

### **Exercise Description**

This exercise is split in 2 parts. It is required to perform each step after the other.

#### 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 app *Manage Imports*.

#### Step 2: Run Consolidation Process

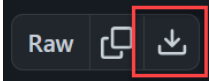
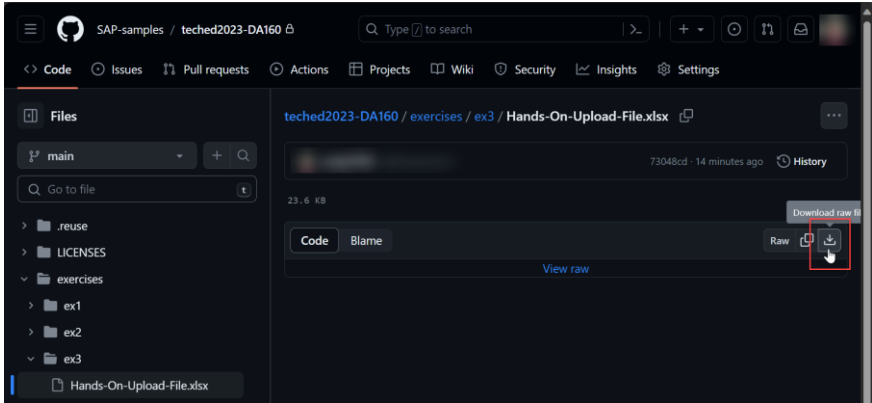
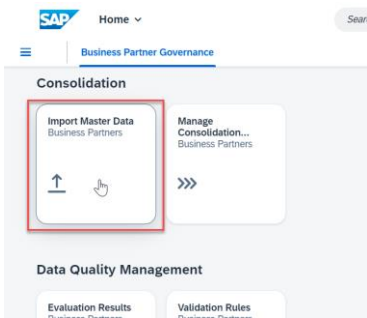
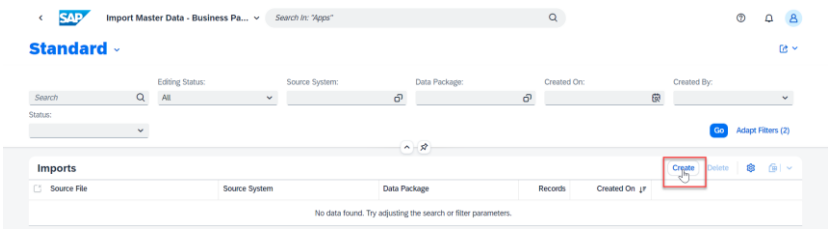
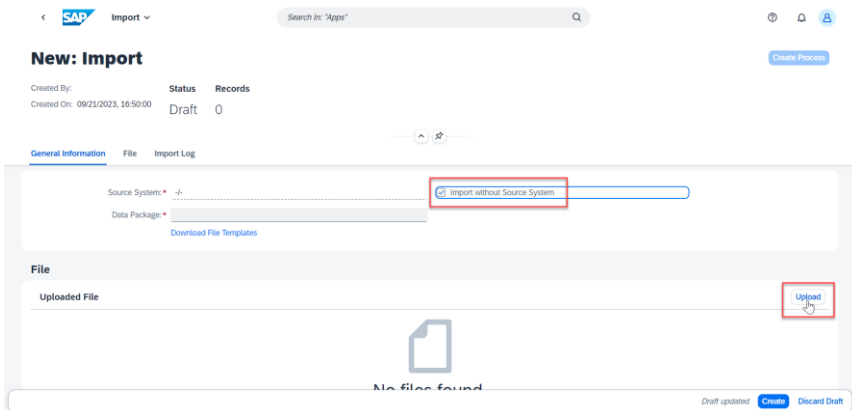
After importing the data from a spreadsheet file, you start a consolidation process. After an initial check you make some manual changes, before you run the matching step to identify duplicates. After a match review the best record calculation will merge the data of a match group. The validation and 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.

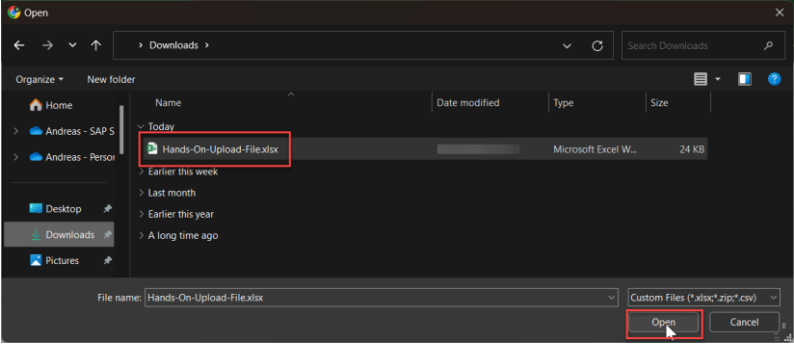
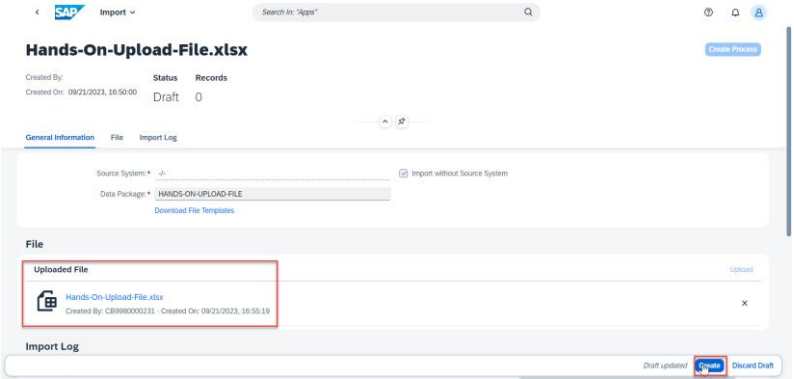
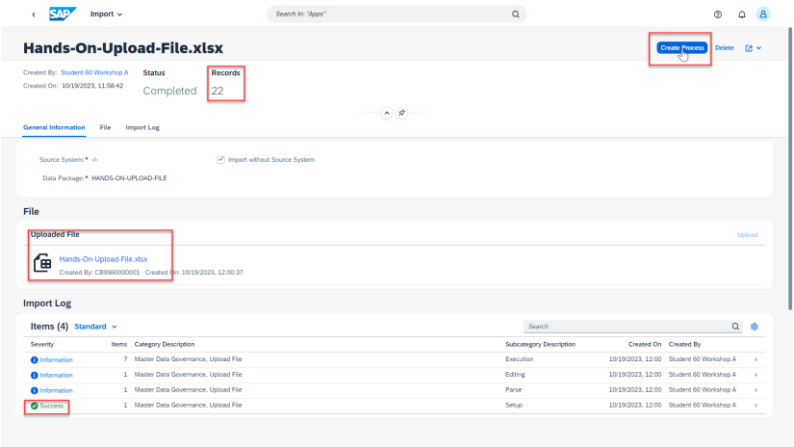
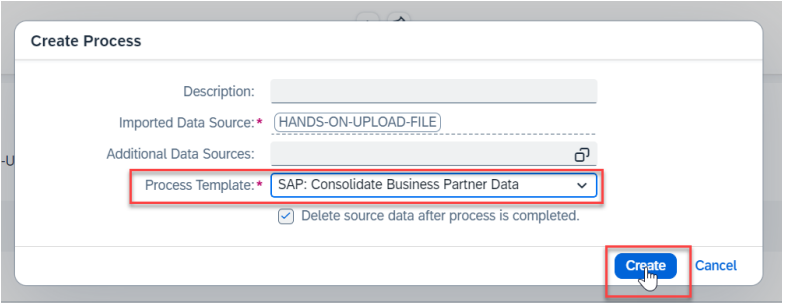


## Instructions

### ***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 app *Manage Imports*.

Explanation	Screenshot
<p>1. Download the file <i>Hands-On-Upload-File.xlsx</i> from Github by navigating to exercise 3 or using the link <a href="#">teched2023-DA160/exercises/ex3/Hands-On-Upload-File.xlsx</a>.</p> <p>Click on the icon <b>Download raw file</b> to download the file.</p> 	
<p>2. Open the app <b>Import Master Data – Business Partners</b></p>	
<p>3. Click on <b>Create</b> to create a new import of data.</p>	
<p>4. Select the checkbox <i>Import without Source System</i>.</p> <p>Note: with this option the creation of key mapping information is omitted.</p> <p>Leave the field <i>Data Package</i> empty. It will be defaulted by the system.</p>	

Explanation	Screenshot
<p>5. Click on <b>Upload</b> and select the file <i>Hands-On-Upload-File.xlsx</i> that you downloaded in the first task.</p> <p>After that click on <b>Open</b>.</p>	
<p>6. Once the file is uploaded, click on <b>Create</b> to start the import process.</p>	
<p>7. Wait until the import is in status <i>Completed</i>. You should see a success message in the import log and a count of 22 records.</p> <p>Click on <b>Create Process</b>.</p>	
<p>8. Select the process template <b>SAP: Consolidate Business Partner Data</b>. You can optionally enter a description.</p> <p>Click on <b>Create</b>.</p>	

## Explanation

9. A process with the records of the import is created.

Proceed to the next step.

## Screenshot

The screenshot displays the SAP interface for the process "SAP: Consolidate Business Partner Data". The interface includes a search bar at the top with the text "Search in: 'Apps'". Below the search bar, the process name is displayed, along with a "Delete" button and a "Show Audit Trail" link. The interface is divided into three main sections: "Details", "Data", and "Progress".

- Details:** This section contains the following information:
  - Process Template: SAP: Consolidate Business Partner Data
  - Process Status: Saved (not started)
  - Process Goal: Consolidation of Source Records
  - Attachments: Files (0)
- Data:** This section displays the number of records, which is 22.
- Progress:** This section shows the progress of the process, which is 0%.

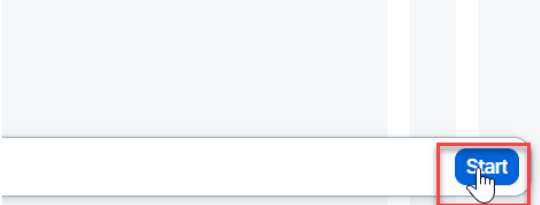
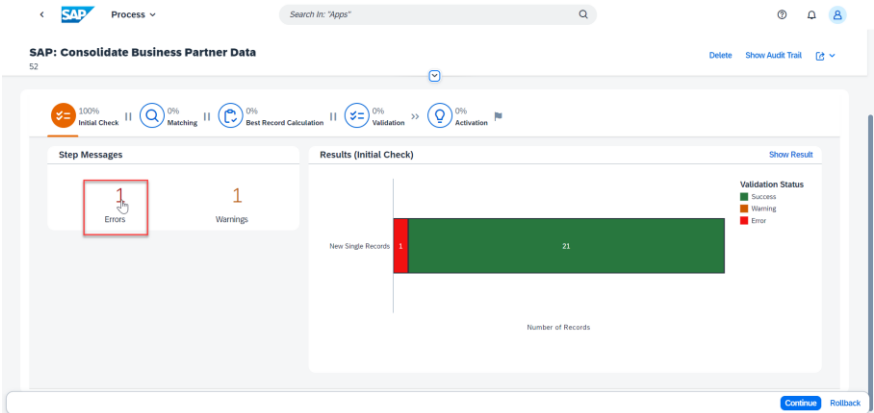
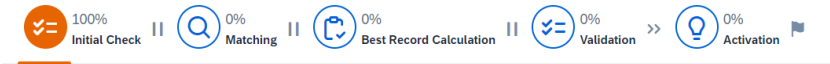
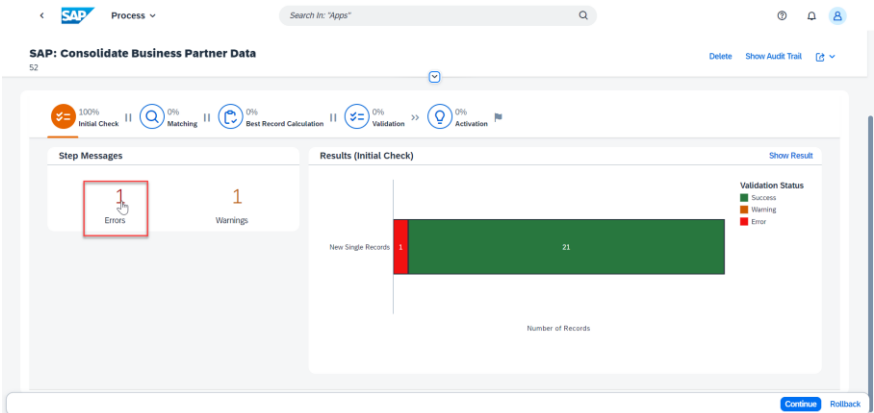
Below these sections, there is a "Step Messages" section with two sub-sections: "Errors" and "Warnings", both showing 0. To the right of the "Step Messages" section is a "Results (Initial Check)" section, which displays "No displayable results".



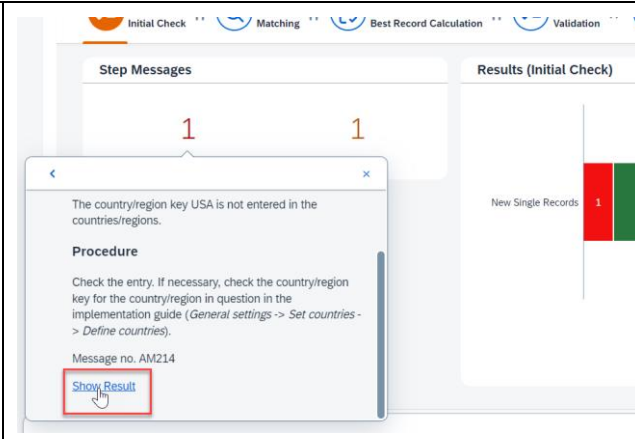


### ***Step 2: Run Consolidation Process***

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
<p>1. Click on <b>Start</b> to run the consolidation process.</p>	
<p>2. The first step <i>Initial Check</i> has been finished and raises an error.</p> <p>Check this error by clicking on the <b>number of errors</b>.</p>	
<p><b>Note</b></p> <p>Each icon represents a step in the process. The icons indicate the progress of processing for each step and for the process overall. You can click on each icon to display information on past, current, and future steps.</p> <p>When performing the exercise, make sure that you display the step indicated in each screenshot.</p>	
<p>3. Examine the error found during data validation by clicking on the <b>number of errors</b>.</p>	

4. 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.



5. The system shows the affected record. You can click on the **2 Messages** link to show the detailed message information.

The screenshot shows the SAP interface for 'SAP: Consolidate Business Partner Data'. The process goal is 'Consolidation of Source Records' and the process step is 'Initial Check'. There are 22 records. The 'Addresses' tab is selected. A table shows one item with the following details: Record Identification: Sunrise Solar Company Shannon Ave 1240 67846 Garden City USA, Source System: -/-, Source ID: 9. Below the table, the 'Details' section shows '2 Messages' highlighted with a red box.

6. The error message is shown. The country key **USA** is not defined.

Close the popup.

The screenshot shows the same SAP interface as before, but with an error message popup displayed. The popup contains two messages: 'Country/region key USA is not defined.' and 'No time zone could be identified for USA region postal...'. The 'Details' section below the table shows '2 Messages'.

7. Select the tab **Addresses** to display the erroneous data. To correct the wrong country key, click on **Edit**.

The screenshot shows the SAP interface with the 'Addresses' tab selected. The table displays the address details for the record: Record Identification: Sunrise Solar Company Shannon Ave 1240 67846 Garden City USA, Source System: -/-, Source ID: 9, Postal Code: 67846, City: Garden City. Below the table, the 'Details' section shows 'Country/Region: USA' highlighted with a red box. An 'Edit' button is visible in the top right corner of the details section.

8. Edit the field Country/Region and enter **US** to display the matching countries.

Select **US** as country key.

SAP: Consolidate Business Partner Data

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General Addresses Address Usages Phone Numbers

Items (1) Standard

3 table filters active: Message Type, Log Message Class, and Log Message Number

Record Identification	Source System	Source ID
Sunrise Solar Company Shannon Ave 1240 67846 Garden City USA	-/-	9

Street: Shannon Ave

House Number: 1240

Region:

Country/Region: US

Changes:

Country/Region	Country/Region Name
US	USA

9. Click on **Save**.

SAP: Consolidate Business Partner Data

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General Addresses Address Usages Phone Numbers

Items (1) Standard

3 table filters active: Message Type, Log Message Class, and Log Message Number

Record Identification	Source System	Source ID	Postal Code	City
Sunrise Solar Company Shannon Ave 1240 67846 Garden City USA	-/-	9	67846	Garden City

Street: Shannon Ave

House Number: 1240

Region:

Country/Region: US

Changes:

Save Cancel

10. The system indicates changed data by displaying *Changes: 1*.

Click on 1 to display the changes.

Click on the **back icon** to navigate back to the process UI.

SAP: Consolidate Business Partner Data

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Details Records

Process Goal: Consolidation of Source Records 22

Process Step: Initial Check

General Addresses Address Usages Phone Numbers

Items (1) Standard

3 table filters active: Message Type, Log Message Class, and Log Message Number

Record Identification	Source System	Source ID
Sunrise Solar Company Shannon Ave 1240 67846 Garden City US	-/-	9

Street: Shannon Ave

House Number: 1240

Region:

Country/Region:

Changes:

Field	Old	New
Country/Region	USA	US

11. Click on **Continue** to run the next step.

SAP Process Search in "Apps" SAP: Consolidate Business Partner Data 52

Details Data Progress

Process Template: SAP: Consolidate Business Partner Data  
Process Status: Stopped for Review (Initial Check)  
Process Goal: Consolidation of Source Records  
Attachments: Files (0)

Data Source: -  
Records: 15

Progress: 20%

100% Initial Check 0% Matching 0% Best Record Calculation 0% Validation 0% Activation

Step Messages

1 Errors 1 Warnings

Results (Initial Check)

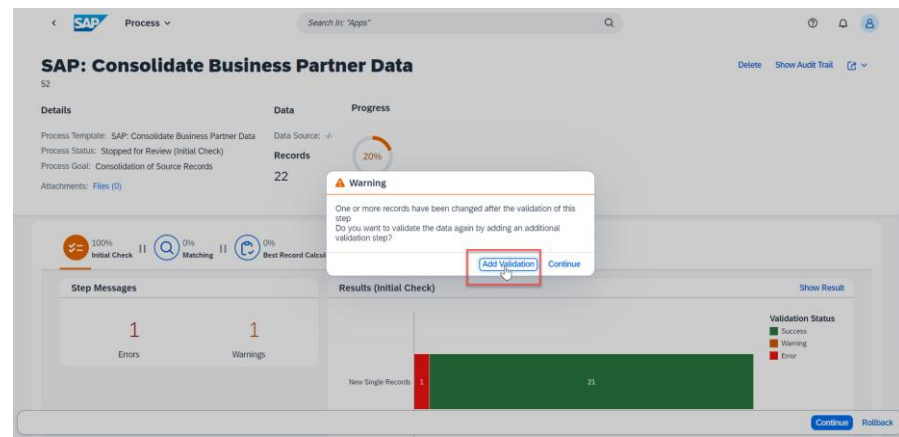
Validation Status

New Single Records: 1 (Error), 14 (Success)

Continue Rollback

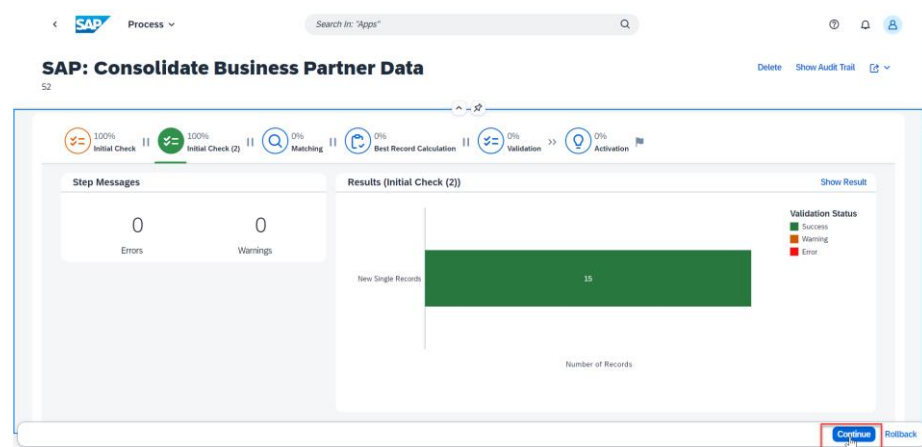
12. The system identifies manual changes and proposes to validate the records again.

Click on **Add Validation**.



13. Since you corrected the error, validation is now performed without errors.

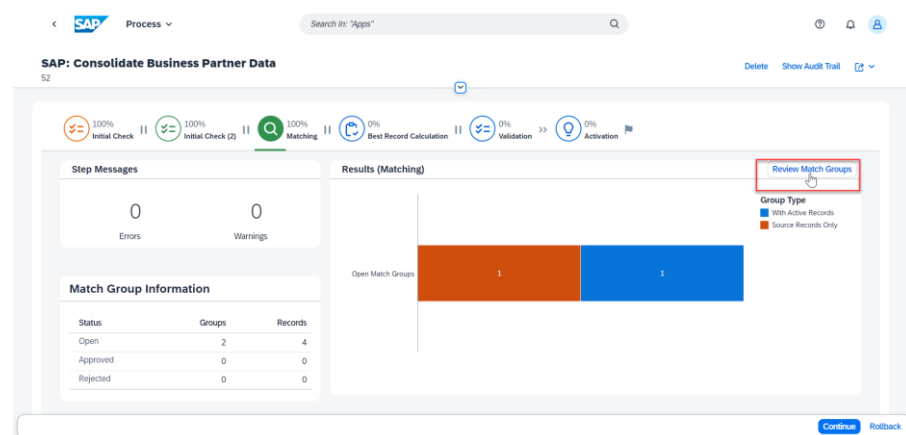
Click on **Continue**.



14. In the matching step the system detects potential duplicate records for 2 business partners. Accordingly, 2 match groups are created. There is one group with an active record and one group with source records only.

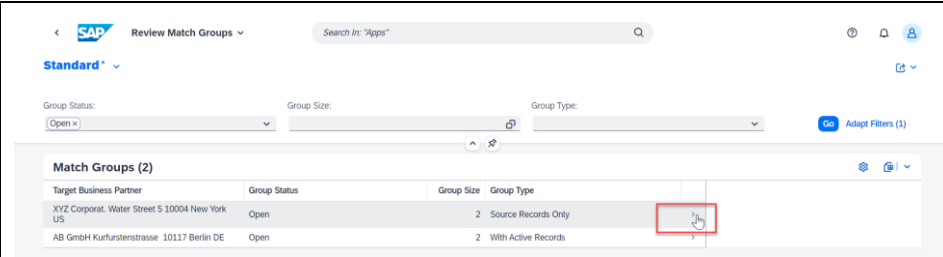
The records are not similar enough to perform an automatic approval of the match group. Consequently, the status of each group is *Open*.

Click on **Review Match Groups** to review the match result.

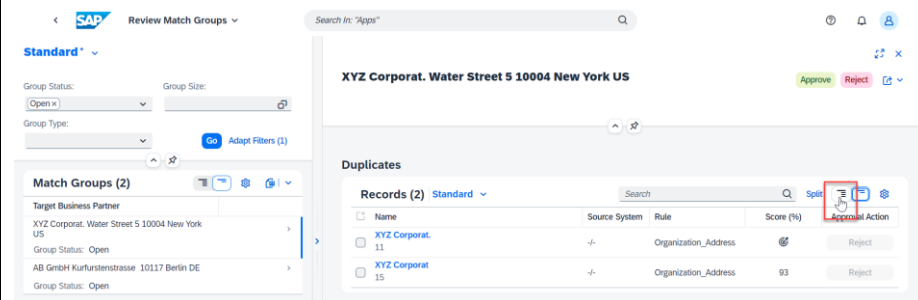


15. The system shows 2 match groups. Each group is in status *Open*.

Select the match group with the target *XYZ Corporat..*

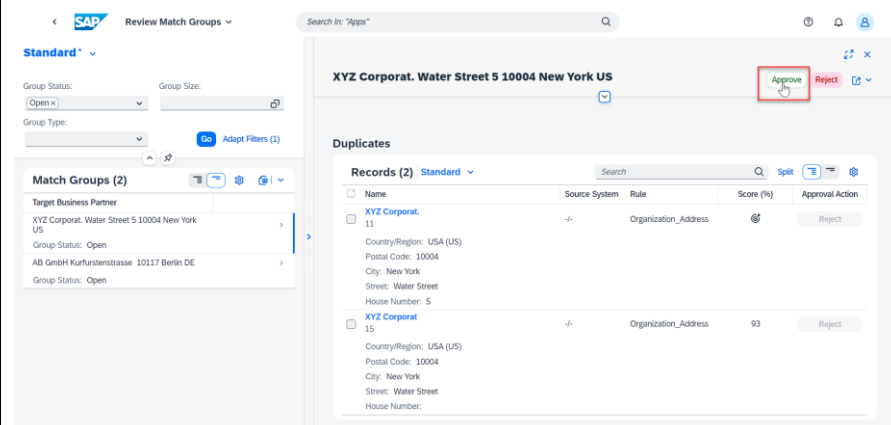


16. You can compare the potential duplicates. Click on **Show More per Row** to show further attributes.



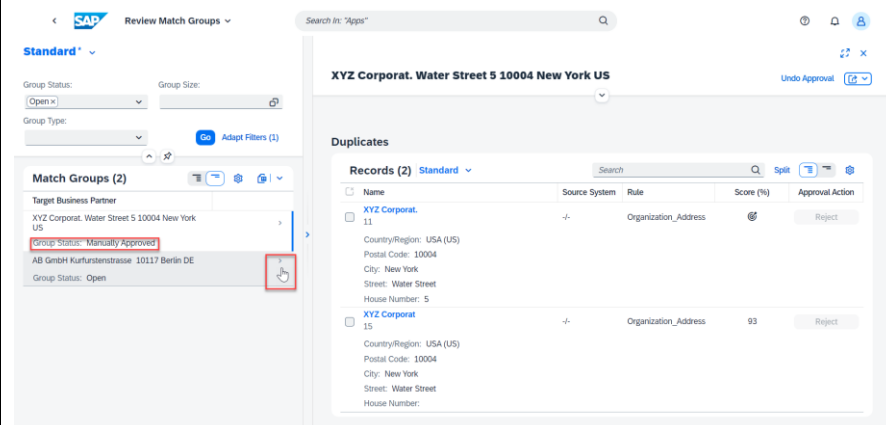
17. There seem to be 2 duplicate records for the company *XYZ Corporat.* in the imported source data. You can see that both records stem from the import, as the value for *Source System* is *-/-*.

Click on **Approve** to confirm this match group.



18. The status of the processed match group changes to *Manually Approved*.

Select the match group for target record *AB GmbH.* for review.

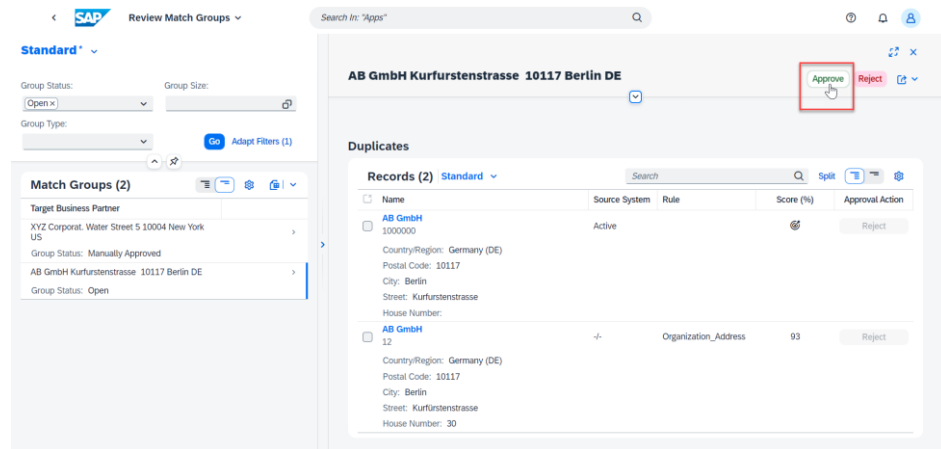




19. The system found an active business partner in the system that is similar to a record in the imported data:

The active business partner is the first record with ID 1000000 from the Source System Active. The second record is the imported record with ID 12.

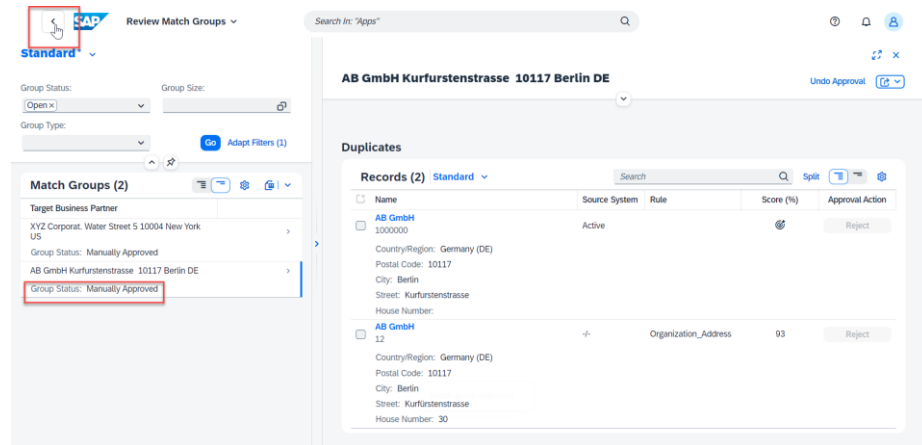
Again, both records apparently are the same business partner. Click on **Approve**.



20. The status of the match group changes to **Manually Approved**.

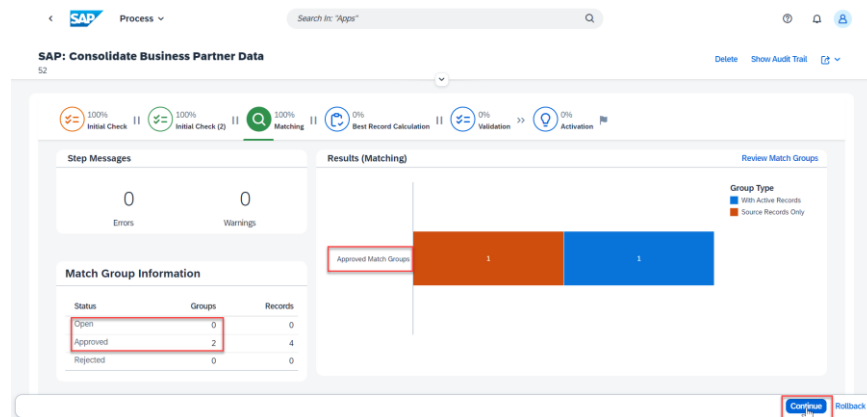
Click on **Back** once to close the details view on the right side.

Click on **Back** a second time to return to the display of the process.



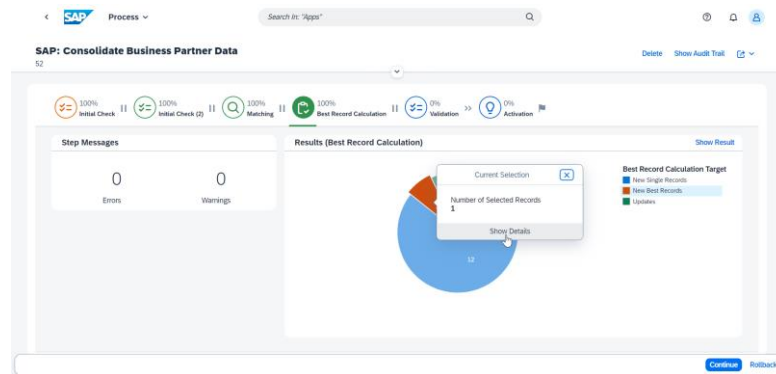
21. You see that both match groups are now approved. This leads to a merge of the records in each group in the next step.

Click on **Continue** to merge the data in the best record calculation.

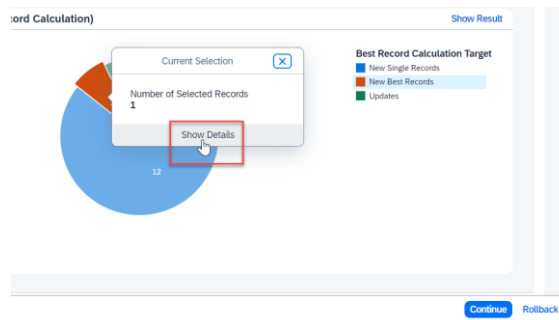


22. You can review the results of the best record calculation, for example using the diagram with segments for each target. For this exercise we only review the record that was created for the 2 duplicates in the source data.

Click on the **New Best Records** in the chart to select this record.

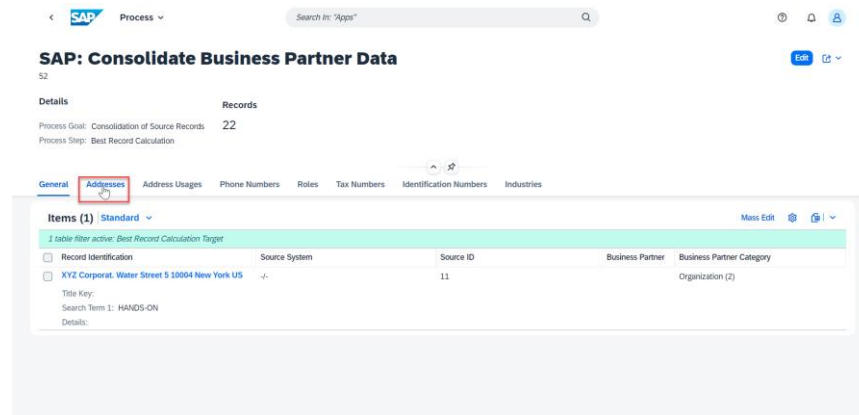


23. Then, click on **Show Details** to display the record.



24. The system produced one new business partner from the 2 duplicates by combining data from each record to a best record.

Click on **Addresses**.



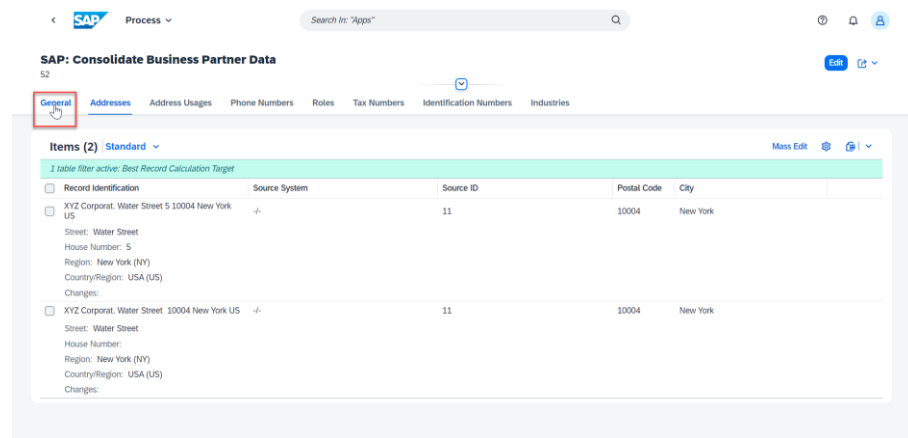
The screenshot shows the SAP interface for 'SAP: Consolidate Business Partner Data'. The 'Addresses' tab is selected and highlighted with a red box. The table below shows the results of the consolidation.

Record Identification	Source System	Source ID	Business Partner	Business Partner Category
<input type="checkbox"/> XYZ Corporat. Water Street 5 10004 New York US	-/-	11		Organization (2)

Below the table, the 'Title Key' is 'HANDS-ON' and the 'Search Term 1' is 'HANDS-ON'.

25. You see 2 addresses, one from each of the source records. You want to display the details of each address to decide whether to delete the address without house number.

Click on **General**.



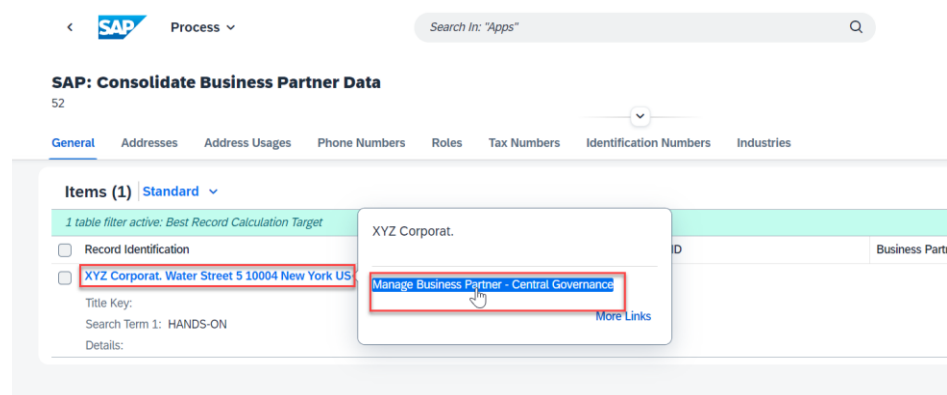
The screenshot shows the SAP interface for 'SAP: Consolidate Business Partner Data'. The 'General' tab is selected and highlighted with a red box. The table below shows the details of the two addresses.

Record Identification	Source System	Source ID	Postal Code	City
<input type="checkbox"/> XYZ Corporat. Water Street 5 10004 New York US	-/-	11	10004	New York
Street: Water Street House Number: 5 Region: New York (NY) Country/Region: USA (US) Changes:				
<input type="checkbox"/> XYZ Corporat. Water Street 10004 New York US	-/-	11	10004	New York
Street: Water Street House Number: Region: New York (NY) Country/Region: USA (US) Changes:				

26. Click on the company name **XYZ Corporat....**

A pop-up is displayed.

Click on **Manage Business Partner – Central Governance** to display the record in this app.



The screenshot shows the SAP interface for 'SAP: Consolidate Business Partner Data'. The 'General' tab is selected. A pop-up window is displayed over the table, showing the company name 'XYZ Corporat.' and a button labeled 'Manage Business Partner – Central Governance' which is highlighted with a red box. The button also has a 'More Links' link next to it.

27. Display the address details by clicking on the **down arrow** of Address, then on **Address Details**.

The screenshot shows the SAP Business Partner interface for 'XYZ Corporat.'. The 'Address' dropdown menu is open, and 'Address Details' is selected. The interface includes tabs for Process Information, General Information, Address, Roles, Bank Accounts, Identification, Industries, Contact Persons, and Relationships. The 'Address' tab is active, showing details for 'Standard Address' and 'Standard Communication'.

28. Click on the second address to display its details.

The screenshot shows the 'Address Details' section for 'XYZ Corporat.'. It displays a table with two items. The second item, 'Water Street 10004 New York', is selected. The table includes columns for Address, Country/Region, Standard, Valid From, Valid To, and Validation Status.

Address	Country/Region	Standard	Valid From	Valid To	Validation Status
Water Street 5 10004 New York	USA (US)	Yes	01/01/0001	12/31/9999	Not Validated
Water Street 10004 New York	USA (US)	No	01/01/0001	12/31/9999	Not Validated

29. As you can see there is no further information, such as address specific telephone numbers. You decide to delete this address.

Click on **Back**.

The screenshot shows the 'Water Street 10004 New York' page. The 'Back' button is highlighted in the top left corner. The 'Address' tab is active, showing details for the selected address. The interface includes tabs for Address, Contact Information, Address Usages, and International Address Versions.

30. Switch to edit mode by clicking on **Edit**.

The screenshot shows the SAP Business Partner Address Details page for 'XYZ Corporat.'. The 'Edit' button in the top right corner is highlighted with a red box. The page displays two tables: 'Items (2)' and 'Address Usages'. The 'Items (2)' table has columns: Address, Country/Region, Standard, Valid From, Valid To, and Validation Status. It contains two rows for 'Water Street 5 10004 New York'. The 'Address Usages' table has columns: Address Type, Standard U..., Address, Valid From, and Valid To. It contains one row for 'Standard Address (XXDEFAULT)'. The 'Roles' section at the bottom shows 'Business Partner Role' with 'Valid From' and 'Valid To' fields.

31. Select the **second address**, then click on **Delete**.

The screenshot shows the same SAP Business Partner Address Details page. The second row in the 'Items (2)' table, 'Water Street 10004 New York', is selected and highlighted with a blue background. The 'Delete' button in the top right corner is highlighted with a red box. The 'Address Usages' table and 'Roles' section are also visible.

32. Confirm the deletion in the dialog.

The screenshot shows a 'Delete' confirmation dialog box. The dialog has a title bar with a warning icon and the word 'Delete'. The main text asks 'Delete item Water Street 10004 New York?'. There are two buttons at the bottom: 'Delete' (highlighted with a red box) and 'Cancel'.

33. Then save your changes.

The screenshot shows the bottom of the SAP Business Partner Address Details page. The 'Save' button is highlighted with a red box. Above it, the text 'Draft updated' is visible. To the right of the 'Save' button is the 'Discard Draft' button. The top of the page shows a search bar and buttons for 'Create', 'Delete', and 'Settings'.

34. Click on **Back** to return to the **Manage Consolidation Processes** app.

SAP Business Partner

XYZ Corporat.

Address Details

Items (1) Standard

Address	Country/Region	Standard	Valid From	Valid To	Validation Status
Water Street 5 10004 New York	USA (US)	Yes	01/01/0001	12/31/9999	Not Validated

Address Usages

Items (1) Standard

Address Type	Standard U...	Address	Valid From	Valid To
Standard Address	Yes	Water Street 5 10004 New York US	01/01/0001	12/31/9999

Roles

Items Standard

Business Partner Role	Valid From	Valid To
No items available.		

35. You can confirm that the address was deleted by switching to the tab **Addresses**. The second address displays **Changes: Deleted**.

Click on **Back** to display the process.

SAP Process

SAP: Consolidate Business Partner Data

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Addresses

Items (2) Standard

1 table filter active: Best Record Calculation Target

Record Identification	Source System	Source ID	Postal Code	City
XYZ Corporat. Water Street 5 10004 New York US	-	11	10004	New York
XYZ Corporat. Water Street 10004 New York US	-	11	10004	New York

Changes: Deleted

36. Click on **Continue** to proceed with processing.

SAP Process

SAP: Consolidate Business Partner Data

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100% Initial Check || 100% Initial Check (2) || 100% Matching || 100% Best Record Calculation || 0% Validation || 0% Activation

Step Messages

0 Errors 0 Warnings

Results (Best Record Calculation)

Best Record Calculation Target

- New Single Records
- New Best Records
- Updates

Continue

37. The system performs a validation of the records.

SAP Process

SAP: Consolidate Business Partner Data

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Background processing ongoing. Please wait.

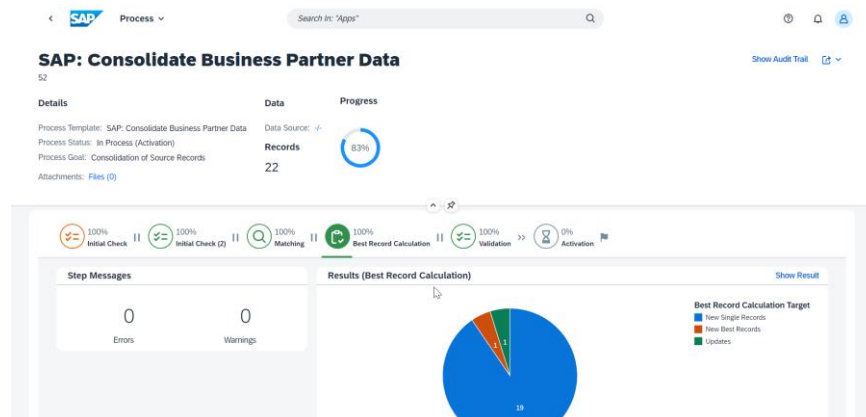
100% Initial Check || 100% Initial Check (2) || 100% Matching || 100% Best Record Calculation || 0% Validation || 0% Activation

Step Messages

0 Errors 0 Warnings

Results (Validation)

38. After that the records are activated to create new business partners and to update existing business partners.

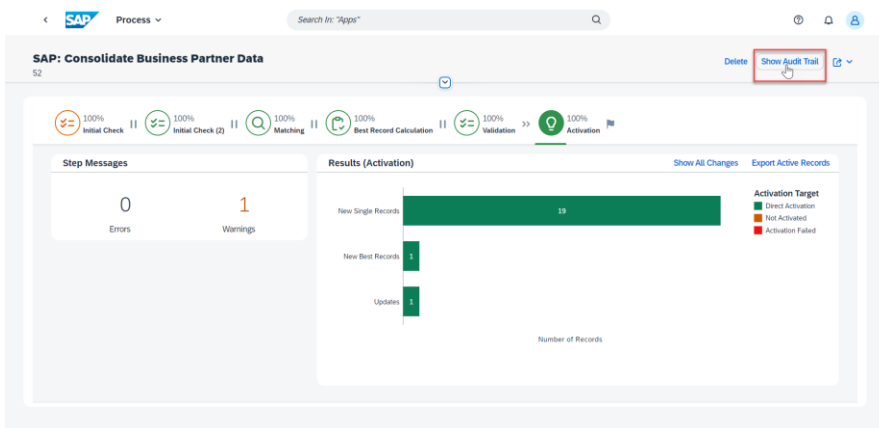


39. You can see that 20 business partners were created from the imported data, thereof 19 without duplicates in the data and 1 as the result of the merge of duplicates.

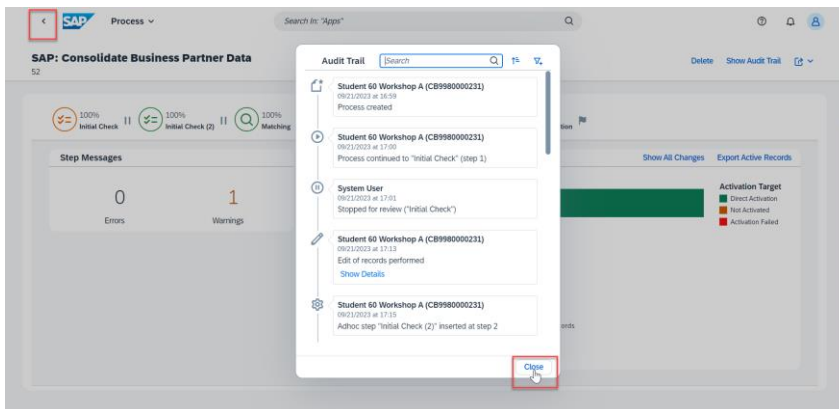
One active record was updated from the imported data.

We close this exercise by having a look at the audit trail.

Click on **Show Audit Trail**.



40. Here, you can review the activities performed by users and by the system.



## ***Exercise Completed***

You finalized a consolidation process in SAP Master Data Governance, cloud edition! You can proceed with the next exercise.

[www.sap.com/contactsap](https://www.sap.com/contactsap)

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