




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.

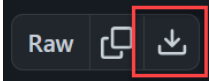
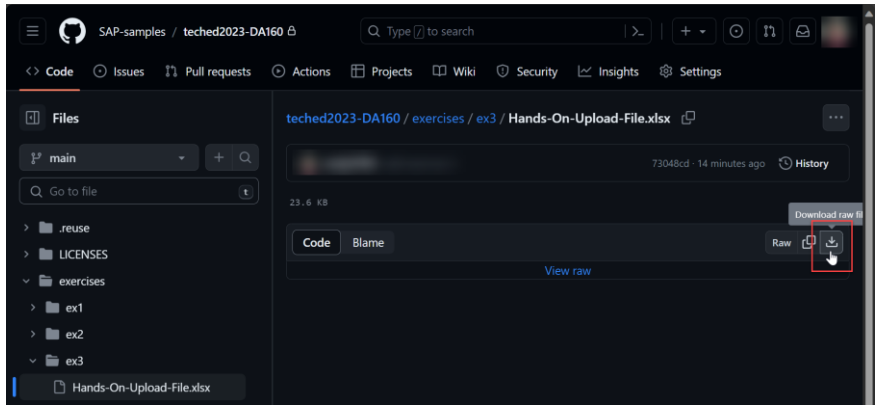
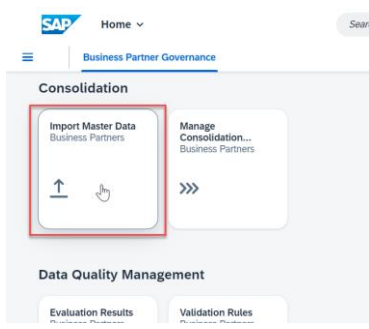
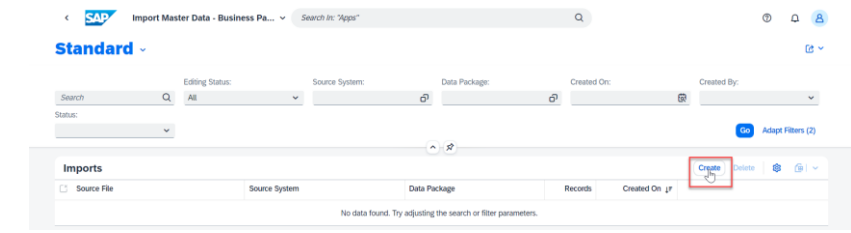
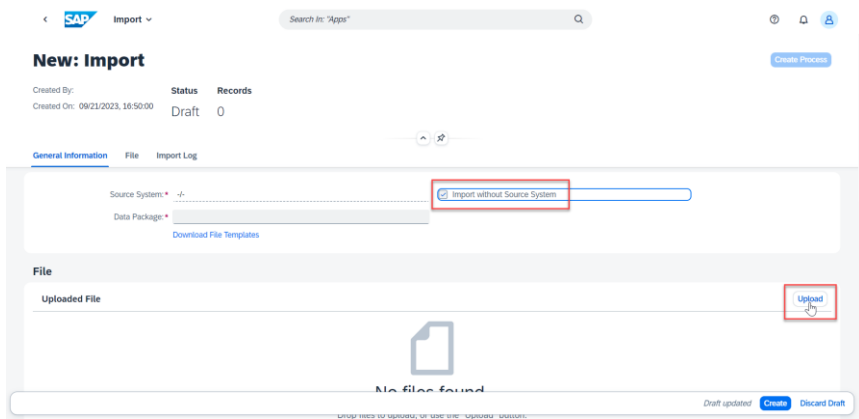
Estimated time: 20 minutes.

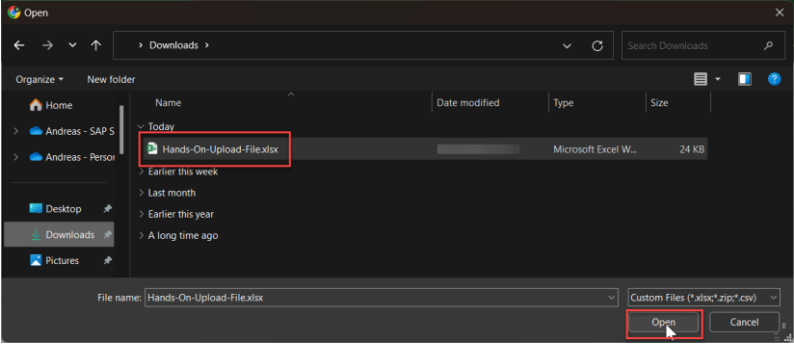
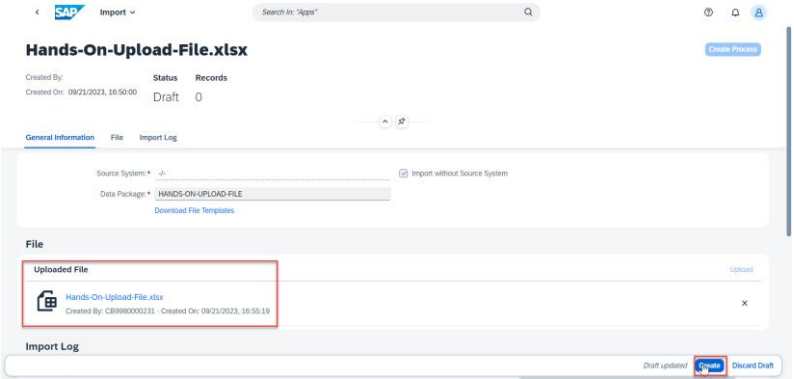
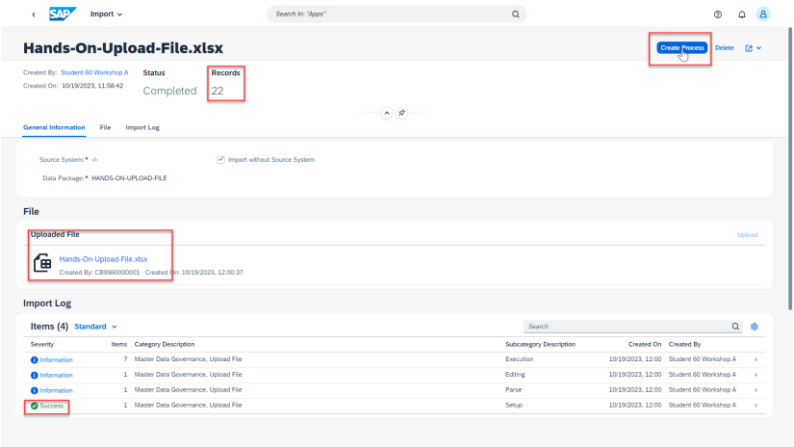
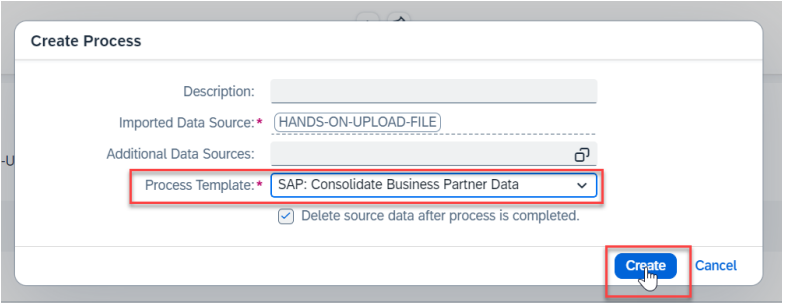


Instructions

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 teched2023-DA160/exercises/ex3/Hands-On-Upload-File.xlsx.</p> <p>Click on the icon Download raw file to download the file.</p> 	
<p>2. Open the app Import Master Data – Business Partners</p>	
<p>3. Click on Create 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 Upload and select the file <i>Hands-On-Upload-File.xlsx</i> that you downloaded in the first task.</p> <p>After that click on Open.</p>	
<p>6. Once the file is uploaded, click on Create 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 Create Process.</p>	
<p>8. Select the process template SAP: Consolidate Business Partner Data. You can optionally enter a description.</p> <p>Click on Create.</p>	

Explanation

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

Proceed to the next step.

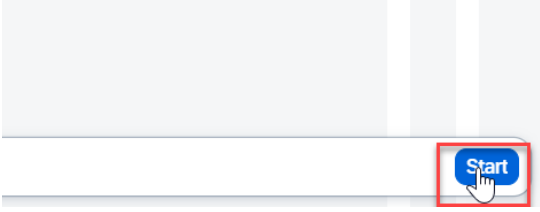
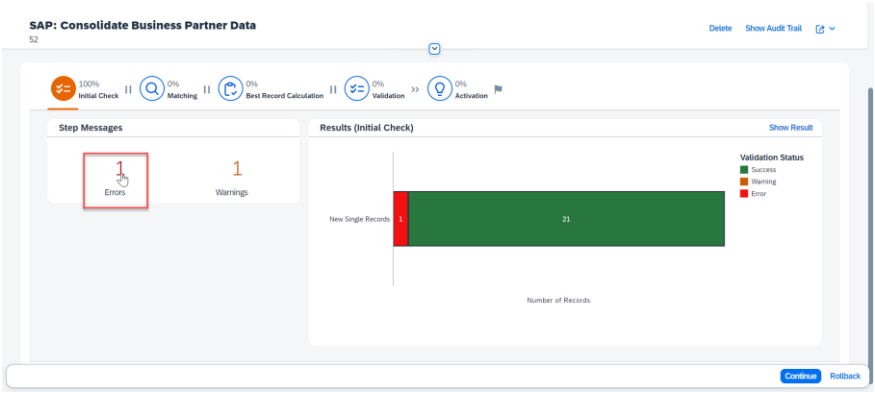
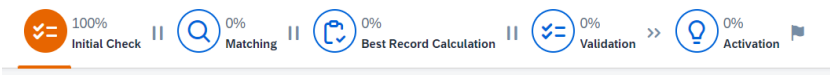
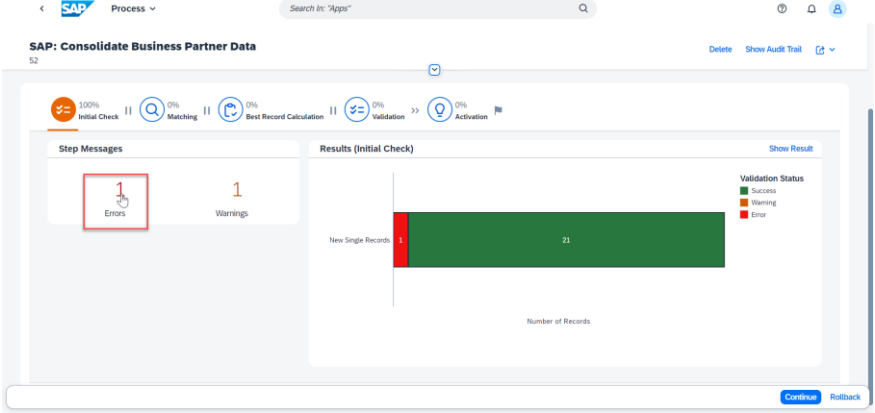
Screenshot

The screenshot displays the SAP interface for the 'SAP: Consolidate Business Partner Data' process. The top navigation bar includes the SAP logo, a 'Process' dropdown, a search bar with the text 'Search in: "Apps"', and user profile icons. The main header shows the process name and a 'Delete' button. Below the header, there are three tabs: 'Details', 'Data', and 'Progress'. The 'Details' tab is active, showing the process template 'SAP: Consolidate Business Partner Data', the data source 'Data Source: /', and the process goal 'Consolidation of Source Records'. The 'Data' tab shows 'Records' with a value of '22'. The 'Progress' tab shows a progress bar at 0%. Below the tabs, there is a 'Step Messages' section with '0 Errors' and '0 Warnings'. The 'Results (Initial Check)' section shows 'No displayable results' with a magnifying glass icon. A 'Start' button is located at the bottom right.

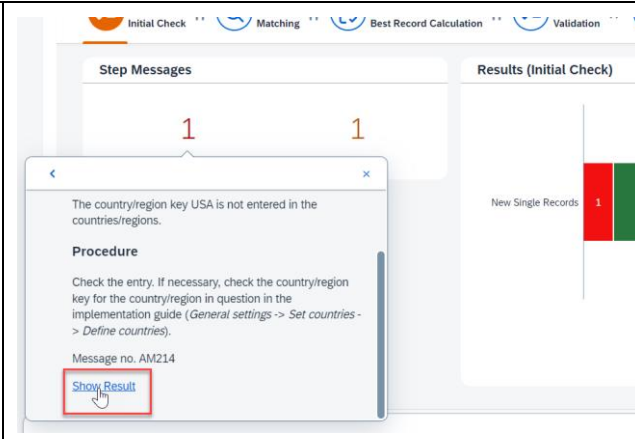


Step 2: Run Consolidation Process

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 .	
Note 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. When performing the exercise, make sure that you display the step indicated in each screenshot.	
3. Examine the error found during data validation by clicking on the number of errors .	

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 'General' tab is selected, showing a table with columns: Record Identification, Source System, and Source ID. The first record is 'Sunrise Solar Company Shannon Ave 1240 67846 Garden City USA'. Below the table, the 'Details' section shows 'Title Key: Search Term 1: HANDS-ON' and a link 'Details: 2 Messages' which is 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: 2 Messages' link is still visible at the bottom of the popup.

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 columns: Record Identification, Source System, Source ID, Postal Code, and City. The first record is 'Sunrise Solar Company Shannon Ave 1240 67846 Garden City USA'. Below the table, the 'Details' section shows 'Region: Country/Region: USA' and a link 'Edit' which is highlighted with a red box.

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

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

Step Messages

1 Errors 1 Warnings

Results (Initial Check)

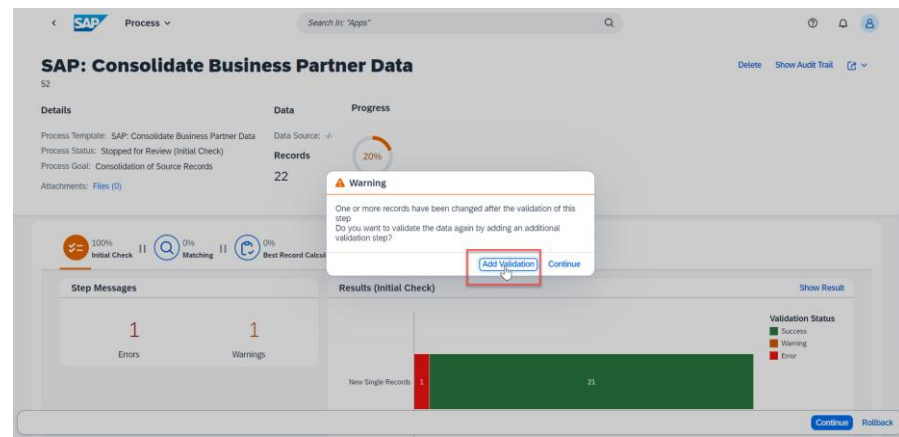
Validation Status

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

Continue Rollback

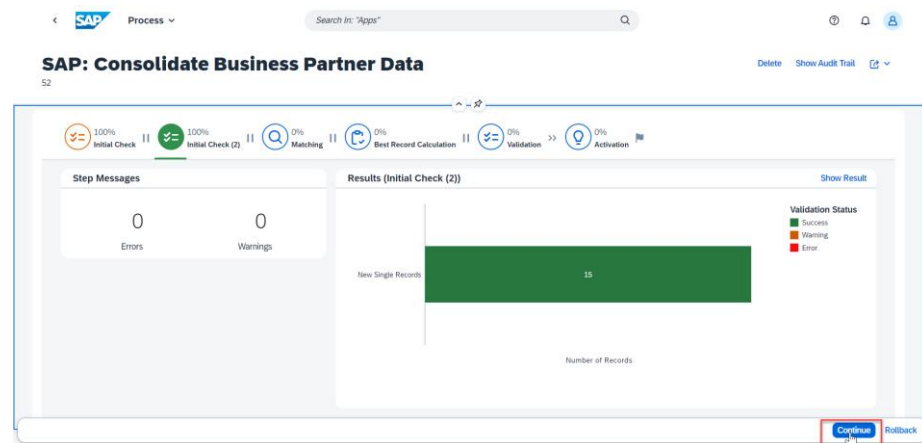
12. The system identifies manual changes and proposes to validate the records again.

Click on **Add Validation**.



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

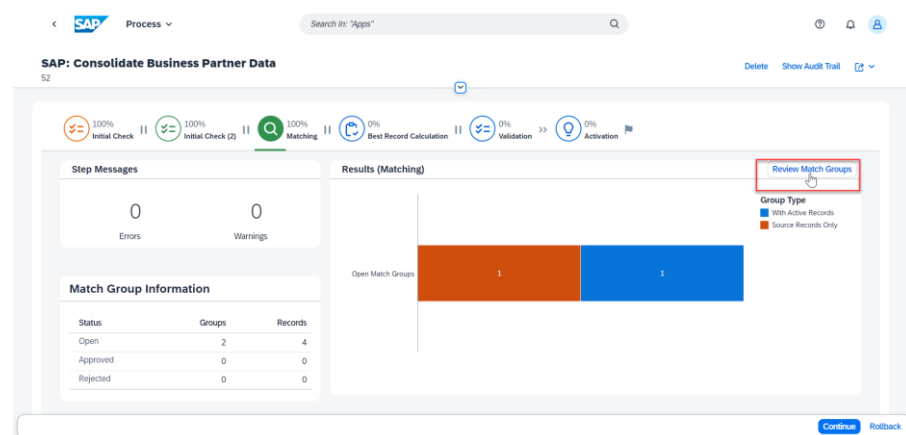
Click on **Continue**.



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.

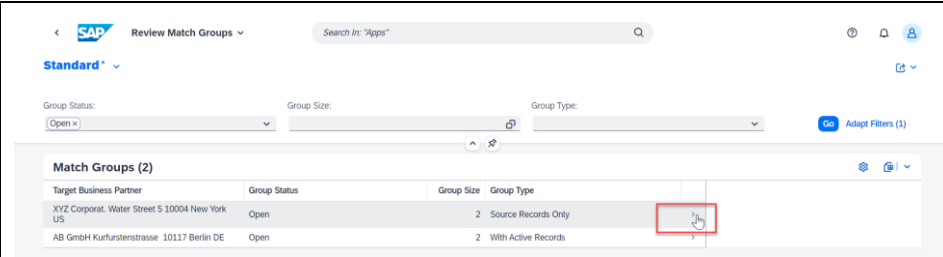
The records are not similar enough to perform an automatic approval of the match group. Consequently, the status of each group is *Open*.

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

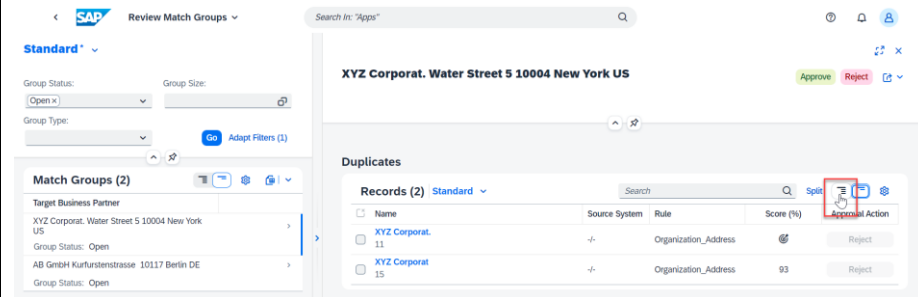


15. The system shows 2 match groups. Each group is in status *Open*.

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

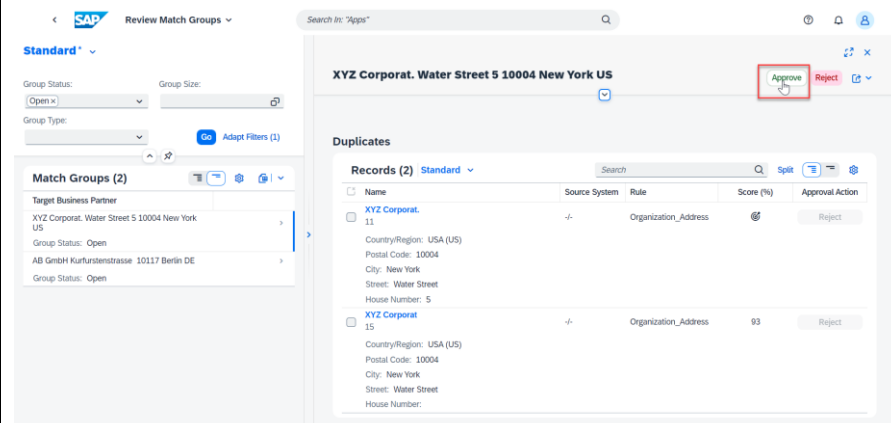


16. You can compare the potential duplicates. Click on **Show More per Row** to show further attributes.



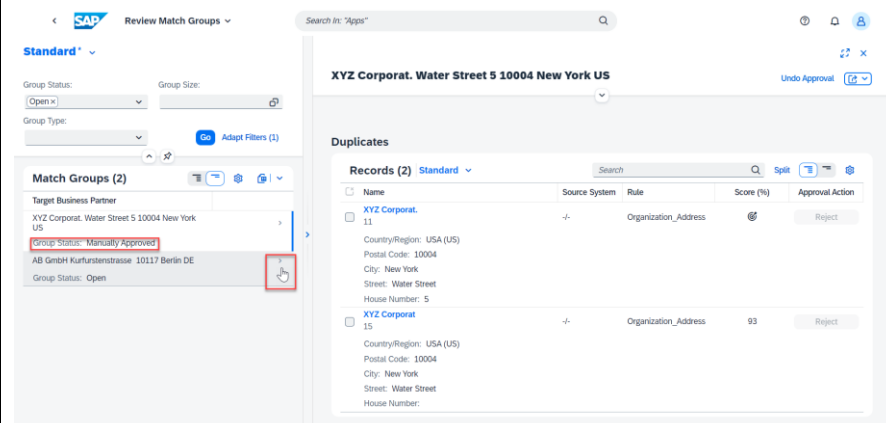
17. There seem to be 2 duplicate records for the company *XYZ Corporat.* in the imported source data. You can see that both records stem from the import, as the value for *Source System* is *-/-*.

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



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

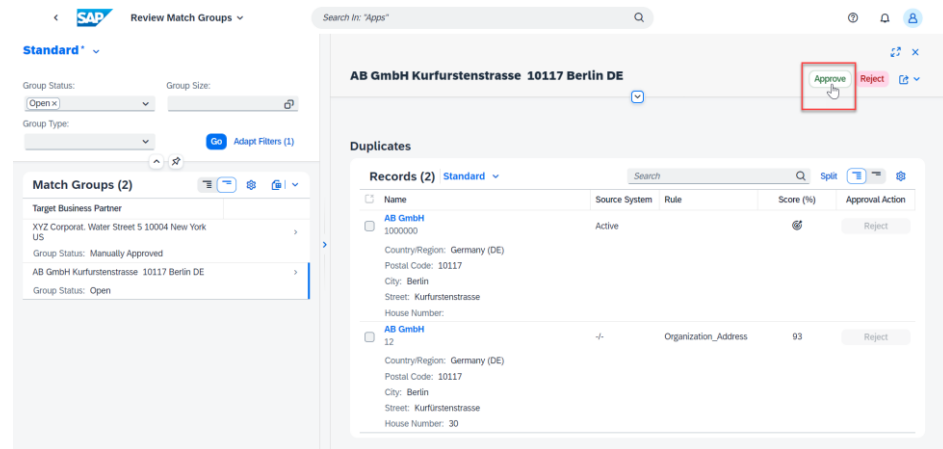
Select the match group for target record *AB GmbH.* for review.



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.

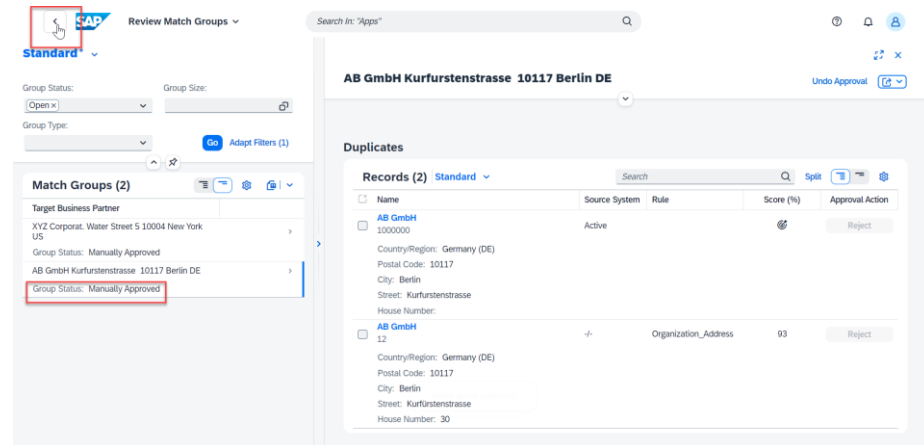
Again, both records apparently are the same business partner. Click on **Approve**.



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

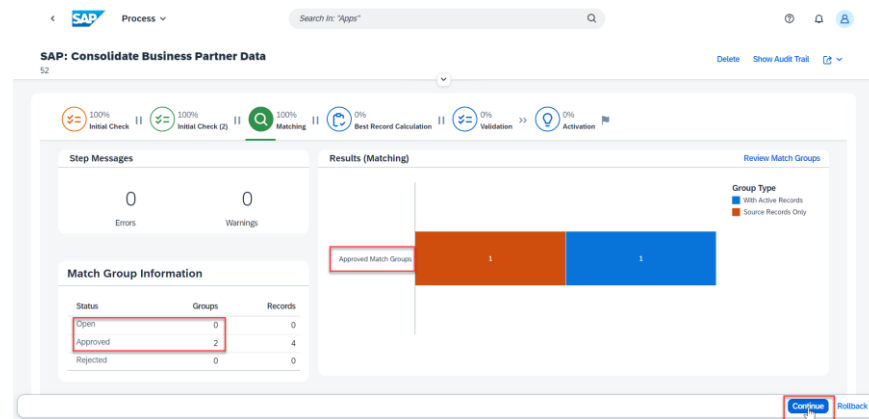
Click on **Back** once to close the details view on the right side.

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



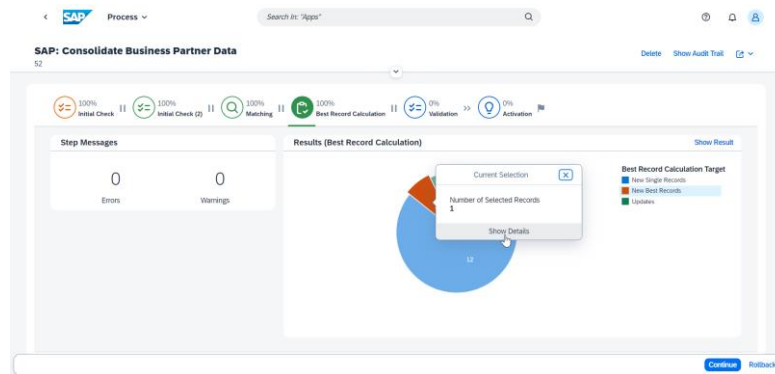
21. You see that both match groups are now approved. This leads to a merge of the records in each group in the next step.

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

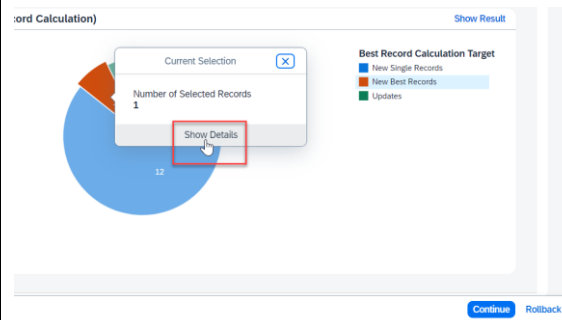


22. You can review the results of the best record calculation, for example using the diagram with segments for each target. For this exercise we only review the record that was created for the 2 duplicates in the source data.

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

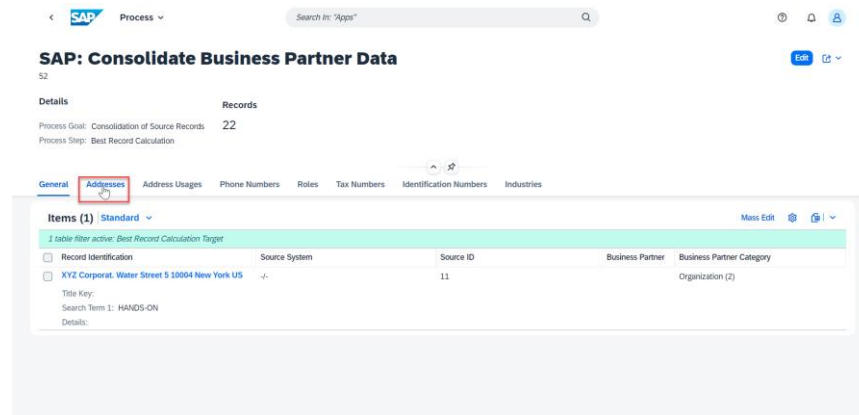


23. Then, click on **Show Details** to display the record.



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**.



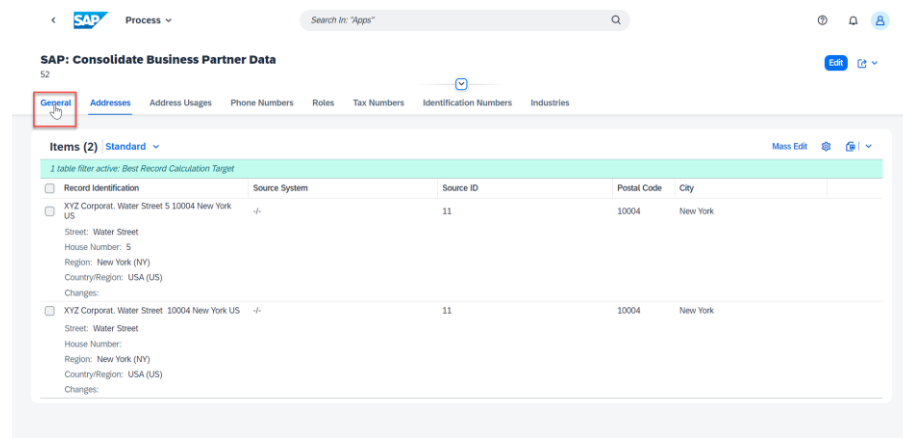
The screenshot shows the SAP interface for 'SAP: Consolidate Business Partner Data'. The 'Addresses' tab is selected and highlighted with a red box. The table below shows the results of the consolidation.

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**.



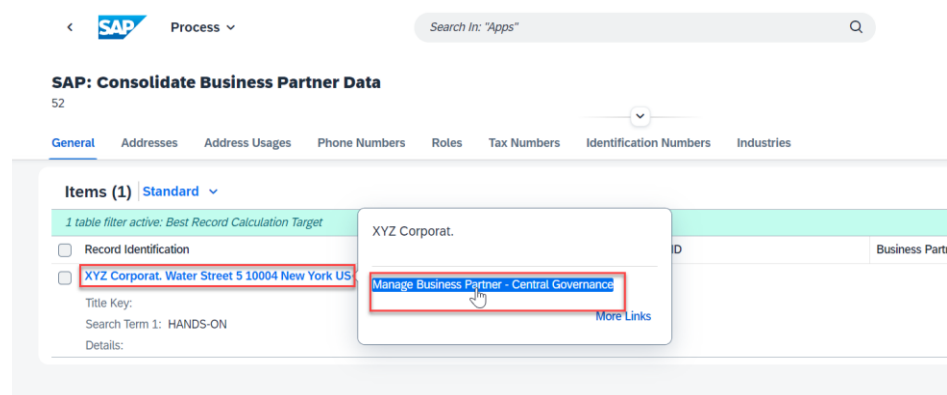
The screenshot shows the SAP interface for 'SAP: Consolidate Business Partner Data'. The 'General' tab is selected and highlighted with a red box. The table below shows the details of the two addresses.

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.'. The 'Items (2)' table lists two addresses. The second address, 'Water Street 10004 New York, USA (US)', is selected. The 'Address Usages' section below shows the 'Standard Address' usage.

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' address details page. The 'Back' button is highlighted in the top left corner. The 'Address' tab is active, showing details for the selected address. The 'Contact Information' section is also visible.

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

The screenshot shows the SAP Business Partner Address Details page for 'XYZ Corporat.'. The 'Address' tab is selected. The 'Items (2)' table shows two address entries. The second entry, 'Water Street 10004 New York', is selected. The 'Edit' button in the top right corner is highlighted with a red box.

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

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

The screenshot shows the same SAP Business Partner Address Details page. The second address, 'Water Street 10004 New York', is now selected, and its radio button is highlighted with a red box. The 'Delete' button in the top right corner is also highlighted with a red box.

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

32. Confirm the deletion in the dialog.

The screenshot shows a 'Delete' confirmation dialog box. The message reads: 'Delete item Water Street 10004 New York?'. The 'Delete' button is highlighted with a red box.

33. Then save your changes.

The screenshot shows the bottom right corner of the SAP Business Partner Address Details page. The 'Save' button is highlighted with a red box. The 'Draft updated' message is visible above the button.

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

The screenshot shows the SAP Business Partner address details for 'XYZ Corporat.'. The 'Back' button is highlighted in the top left corner. The page displays address details, address usages, and roles.

Items (1)	Standard
Address	Country/Region
Water Street 5 10004 New York	USA (US)
Standard	Valid From
Yes	01/01/0001
Valid To	12/31/9999
Validation Status	Not Validated

Items (1)	Standard
Address Type	Standard U...
Standard Address	Yes
Address	Water Street 5 10004 New York US
Valid From	01/01/0001
Valid To	12/31/9999

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.

The screenshot shows the SAP Process 'SAP: Consolidate Business Partner Data' with the 'Addresses' tab selected. The 'Back' button is highlighted in the top left corner. The table shows two addresses, with the second one marked as 'Changes: Deleted'.

Items (2)	Standard
Record Identification	Source System
XYZ Corporat. Water Street 5 10004 New York US	11
Postal Code	City
10004	New York
Street: Water Street	
House Number: 5	
Region: New York (NY)	
Country/Region: USA (US)	
Changes:	
XYZ Corporat. Water Street 10004 New York US	11
Postal Code	City
10004	New York
Street: Water Street	
House Number:	
Region: New York (NY)	
Country/Region: USA (US)	
Changes: Deleted	

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

The screenshot shows the SAP Process 'SAP: Consolidate Business Partner Data' with the progress bar and the 'Continue' button highlighted. The progress bar shows 100% for Initial Check, Initial Check (2), Matching, and Best Record Calculation, and 0% for Validation and Activation.

Step Messages: 0 Errors, 0 Warnings

Results (Best Record Calculation):

Best Record Calculation Target	Count
New Single Records	12
New Best Records	1
Updates	1

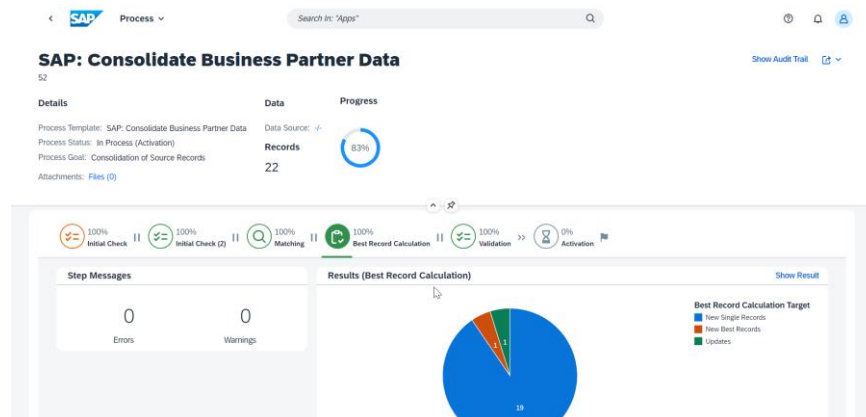
37. The system performs a validation of the records.

The screenshot shows the SAP Process 'SAP: Consolidate Business Partner Data' with the validation progress bar. The progress bar shows 100% for Initial Check, Initial Check (2), Matching, and Best Record Calculation, and 0% for Validation and 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.

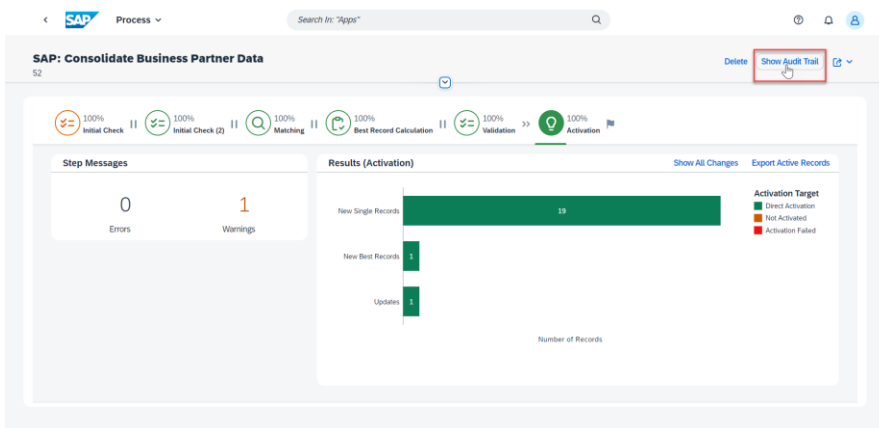


39. You can see that 20 business partners were created from the imported data, thereof 19 without duplicates in the data and 1 as the result of the merge of duplicates.

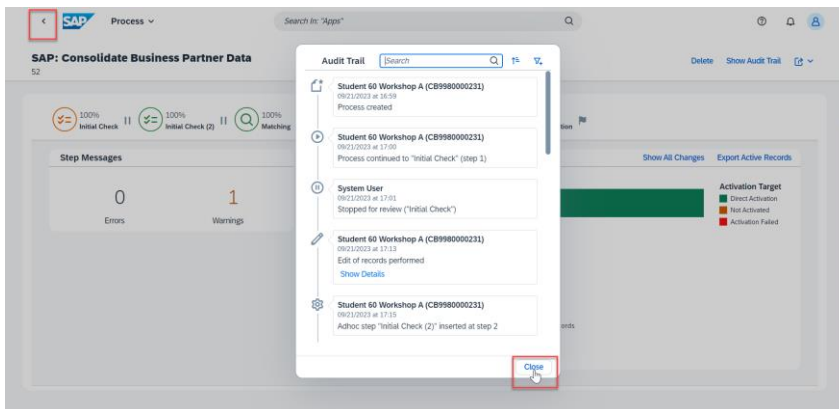
One active record was updated from the imported data.

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.

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