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

Exercise 2
Business Partner Creation with Central Governance

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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.

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.

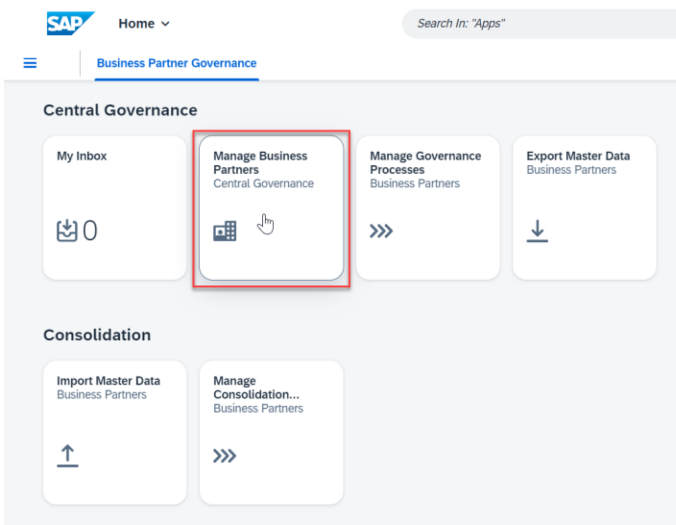
Objective of this Exercise

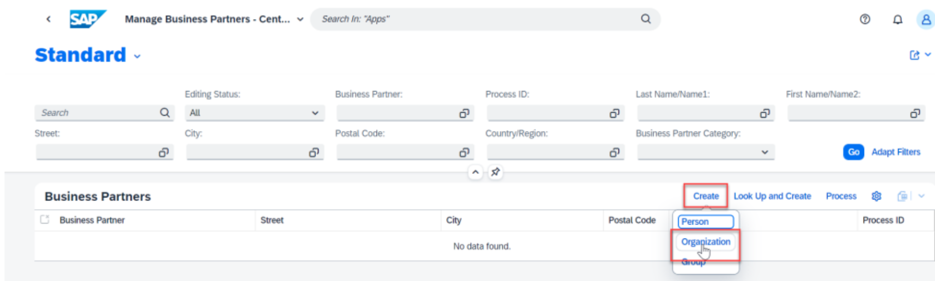
In this exercise, you will learn the basics for working with the central governance capabilities of SAP Master Data Governance, cloud edition. You will start by creating a business partner with different data sets, such as address, role, bank data, and identification numbers. Then you submit your request for approval.

Estimated time: 10 minutes.

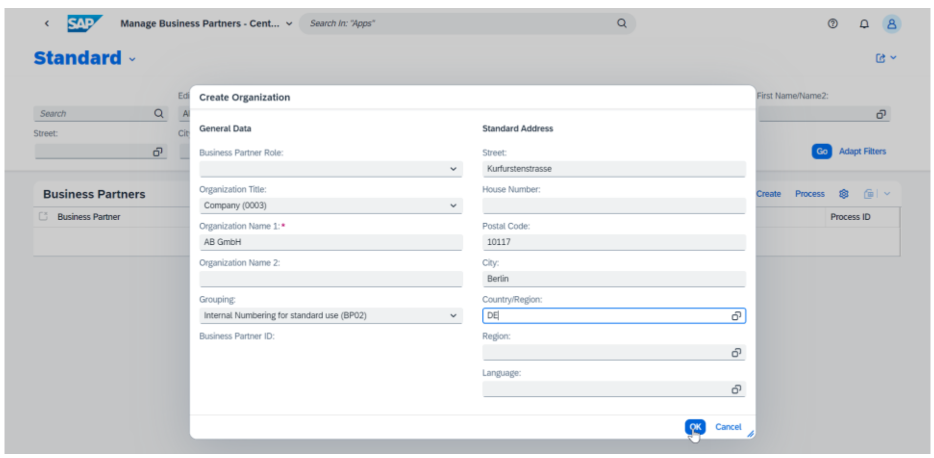
Step 1: Create Business Partner

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

Explanation	Screenshot
1. Click on the tile ***Manage Business Partners – Central Governance.***	

<table>
<tr><th>Explanation</th><th>Screenshot</th></tr>
<tr><td>2. Click on the Create button and select Organization in the list.</td><td>
</td></tr>
<tr><td>3. A dialog to create an organization is displayed. Enter the following information:

a) Organization Title: Company (0003)
b) Organization Name1: AB GmbH
c) Street: Kurfurstenstrasse
d) Postal Code: 10117
e) City: Berlin
f) Country/Region: DE

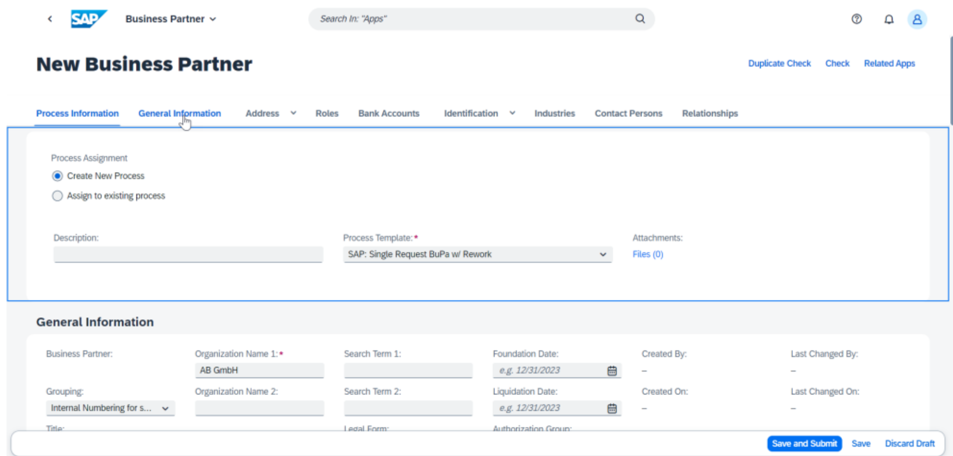
Then, click on OK.</td><td>
</td></tr>
</table>

<table>
<tr><th>Explanation</th><th>Screenshot</th></tr>
<tr><td>

4. An overview page with the information entered in the previous dialog is displayed to continue with the creation.

   The tab *Process Information* shows that you are going to create a new process to create this business partner. The description is optional and will be defaulted by the system.

</td><td>



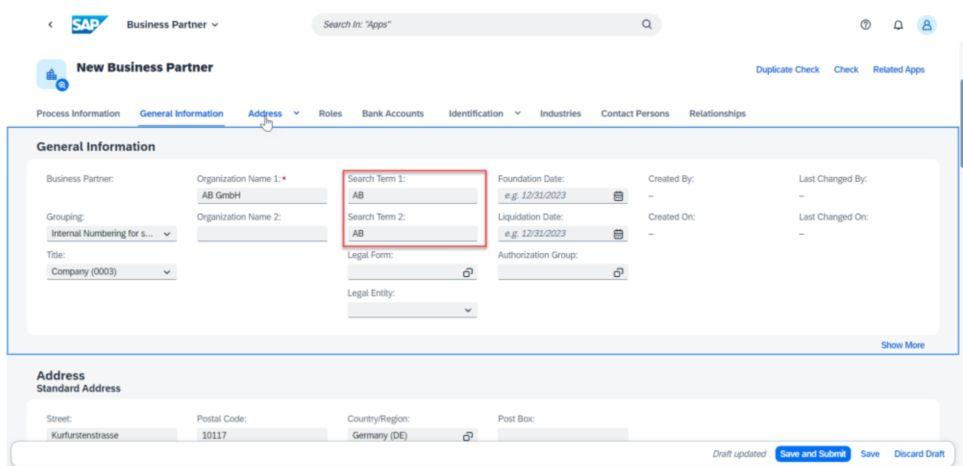
</td></tr>
<tr><td>

5. In the tab *General Information*, enter *AB* as the same value for both *Search Term 1* and *Search Term 2*:

   a) Search Term 1: ***AB***
   b) Search Term 2: ***AB***

This information will be used in a later exercise.

</td><td>

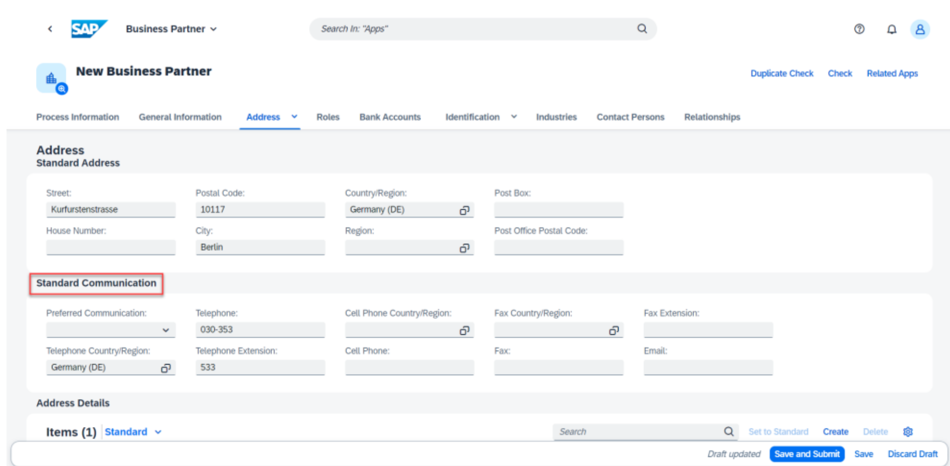


</td></tr>
<tr><td>

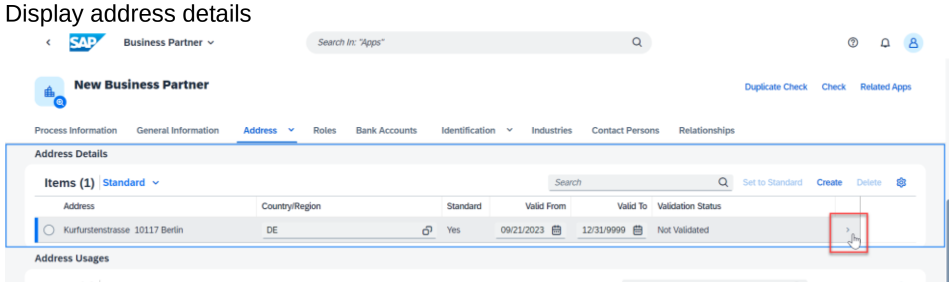
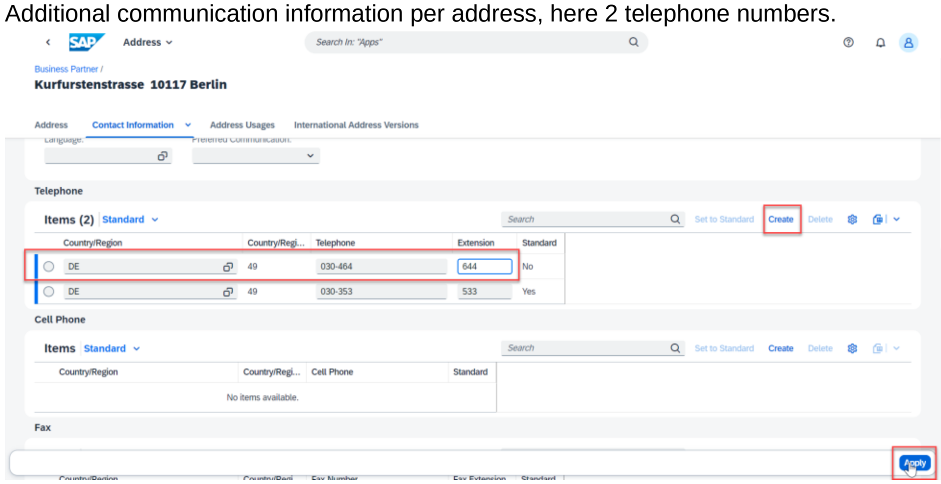
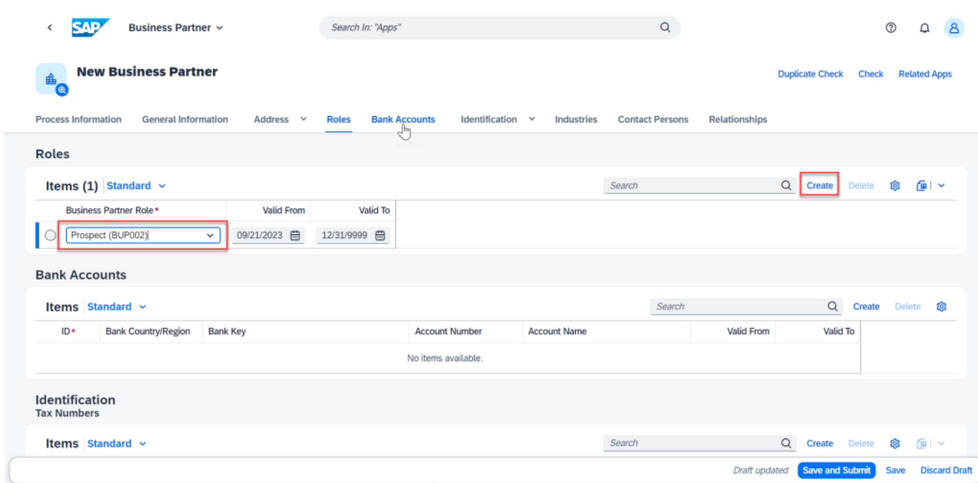
6. In the section *Standard Communication*, you can enter some communication data such as telephone number, fax number, email address, URL, etc.

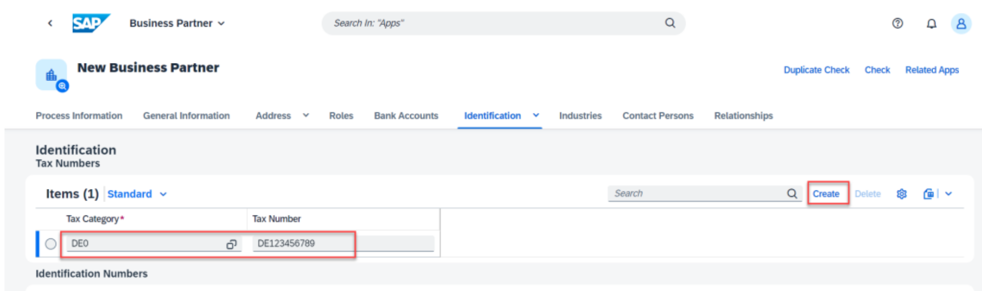
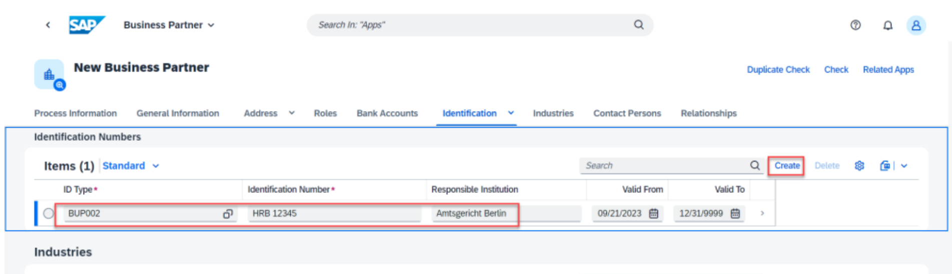
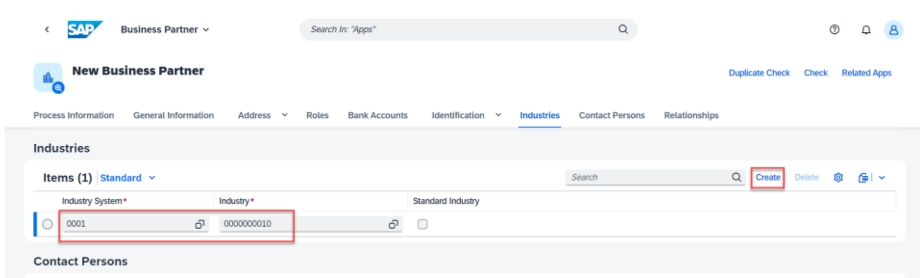
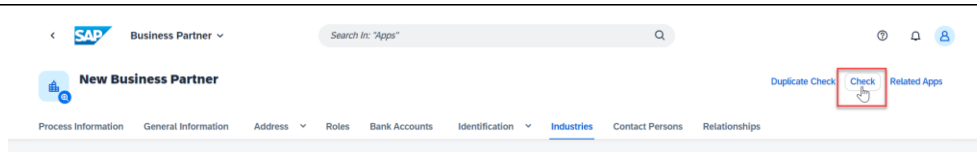
   Enter any values that you want.

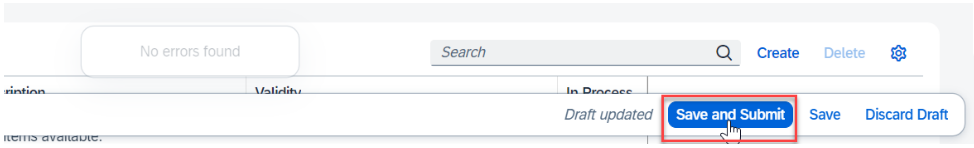
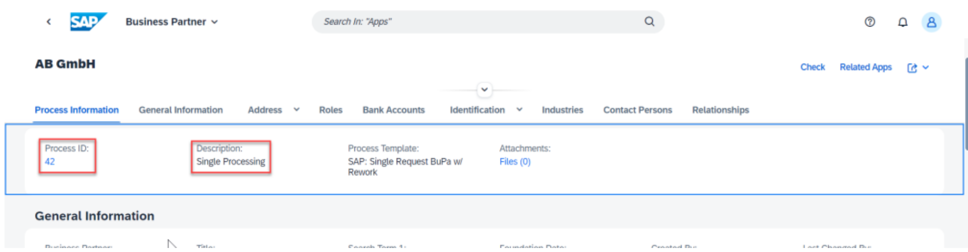
</td><td>



</td></tr>
</table>

Explanation	Screenshot
7. **Optional:** You can also add more communication information, e.g. additional telephone numbers. To do so, go to address details page. By clicking on the ***Create*** button of each section, you can create additional items. If more than one item, for example two telephone numbers are entered, one item should be flagged as 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 enabled if you select an item. Click on the ***Apply*** button to back to the business partner page.	a) Display address details  b) Additional communication information per address, here 2 telephone numbers. 
8. Navigate to the tab *Roles*, click on the ***Create*** button. A new line will be created. In the dropdown list, select ***Prospect (BUP002)***.	

Explanation	Screenshot
9. Navigate to the tab *Tax Numbers* and click on the ***Create*** button. Select *Tax Category*, ***DE0*** and enter *Tax Number* ***DE123456789***.	
10. Go to Identification Numbers and click on the ***Create*** button. Select any ID Type and enter any Identification Number. Example: ID Type: ***BUP002*** Identification Number: ***HRB 12345*** Responsible Institution: ***Amtsgericht Berlin***	
11. Go to Industries and click on the ***Create*** button. Select *Industry System* 0001 and *Industry* 10 using the value help.	
12. To check data set, click on the ***Check*** button in the upper right corner. Note that customer specific rules can be included here. This is subject to another exercise.	

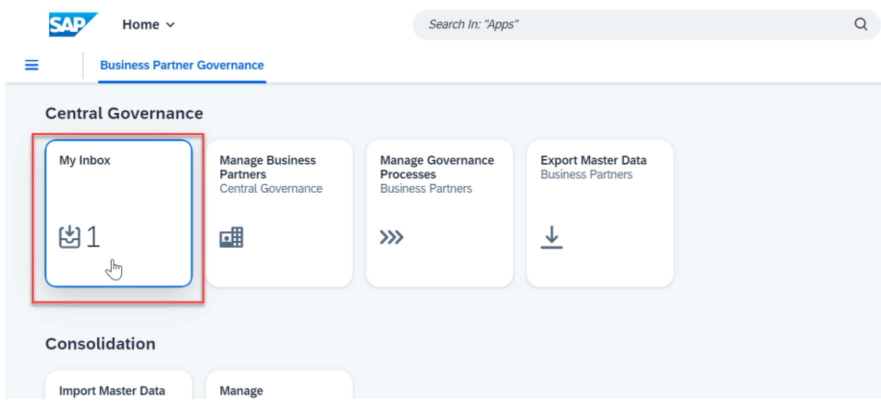
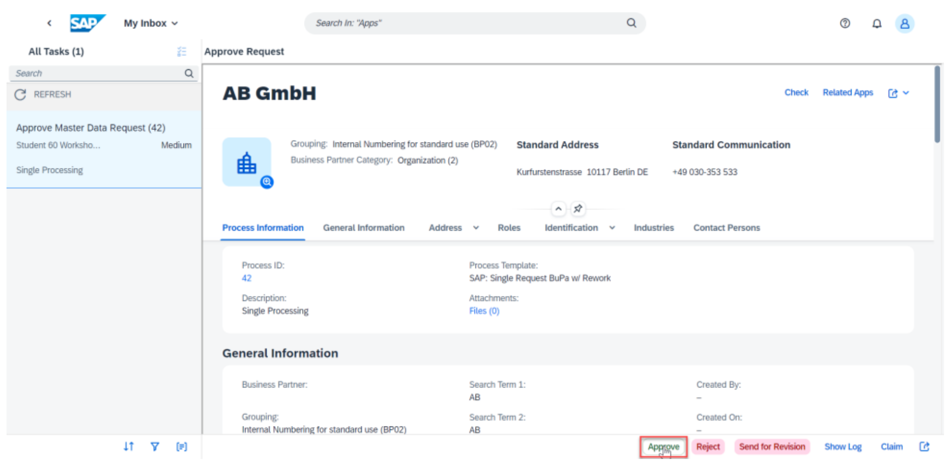
Explanation	Screenshot
13. Click on the ***Save and Submit***. Your request will be saved and submitted to approver. Alternatively, you can save by clicking on *Save* button and click on *Submit* button on the upper right corner.	
14. You can see the Process ID of your request in the section Process Information. Unless you have not entered a description by yourself, a default description was created. Click on the **SAP** logo to return to Home.	

Result
You have submitted your request for approval.

Step 2: Approve Business Partner

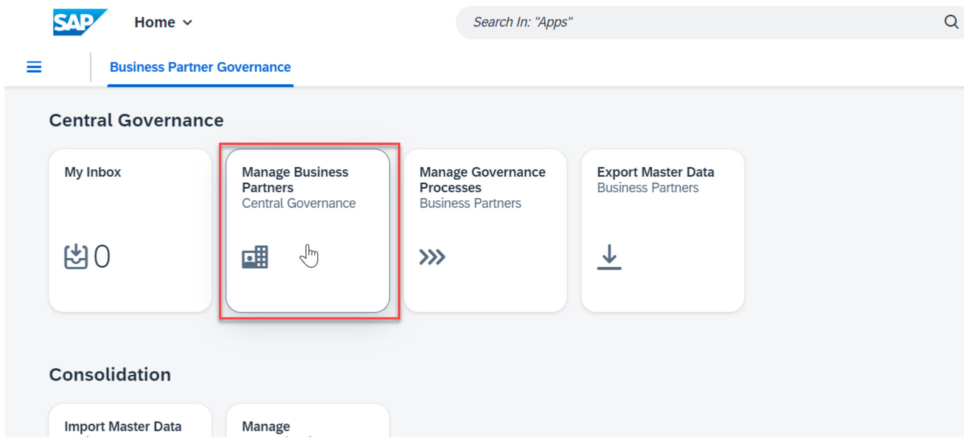
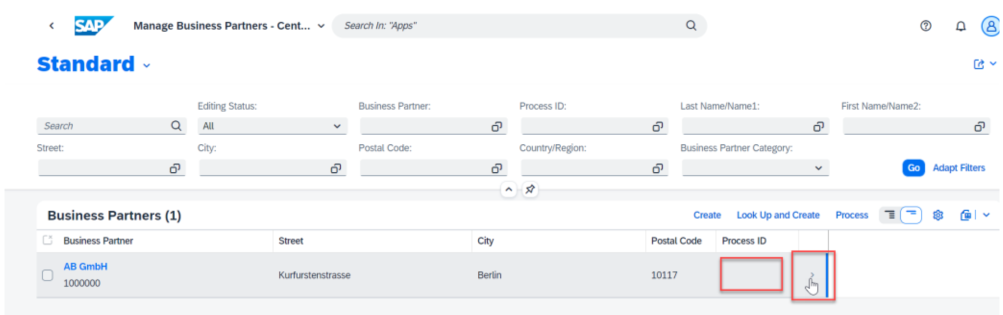
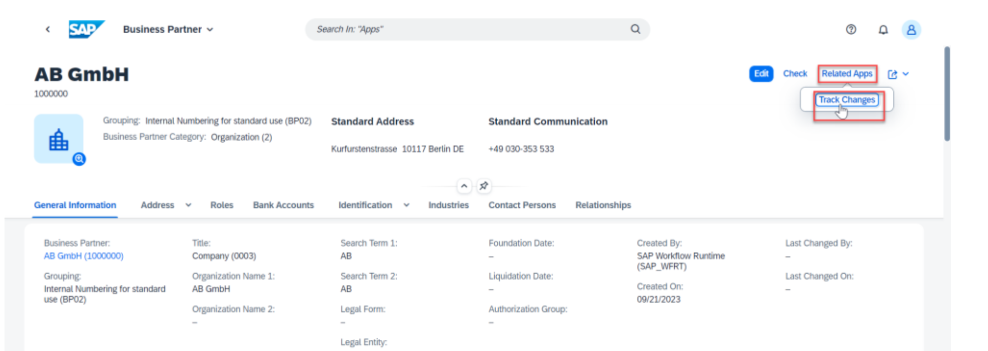
In the previous step, you submitted a request to create a business partner. In this exercise you play the approver role as well. As such, you will get a workflow task in your workflow inbox. You check your workflow inbox and approve the request.

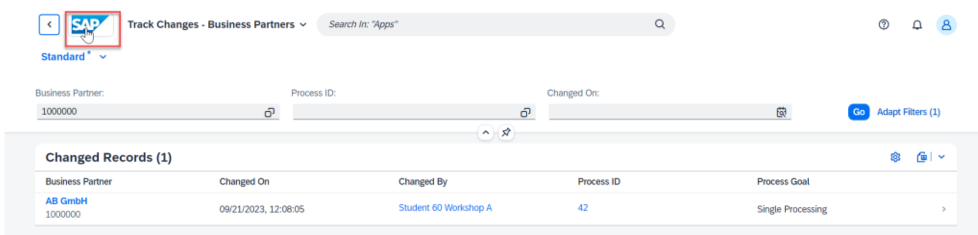
The standard workflow also includes a notification of the requestor via mail once the request was approved. However, you cannot receive this mail, because generic users are used in this workshop for which you do not have access to the mail account.

Explanation	Screenshot
1. Open the group ***Central Governance*** and click on the tile ***My Inbox.*** You can see the number of inbox items.	
2. Your request will be displayed. Check your data whether all data sets are correctly displayed. In the footer of the page, click on ***Approve*** to approve the request. This will complete your workflow task. Note: The approver also has the options to reject the request or send the request back to the requestor for revision. Click on the **SAP** logo to return to Home.	

Step 3: Verify Business Partner

You search for your business partner that you created in the previous step.

Explanation	Screenshot
1. Open the group ***Central Governance*** and click on the tile ***Manage Business Partners – Central Governance***	
2. Click on **Go** to perform a search without filters. The search result displays the business partner that you requested. Note that there is no longer a process ID displayed, indicating that this business partner is active. Click on the **>** icon to display the details of the business partner.	
3. Note that there is also no longer a tab *Process Information*, as the active version of the business partner is displayed. Click **Related Apps → Track Changes**.	

Explanation	Screenshot
4. You can see which user created the business partner and which process was used for that. Click on the **SAP** logo to return to Home.	

Exercise Completed

You can proceed with the next exercise.