

PUBLIC

Hands-On Experience on SAP Master Data Governance, Cloud Edition

Exercise 2: Consolidation

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.

Prerequisites

You have set up the free tier plan for SAP Master Data Governance, cloud edition as outlined in the [Getting Started Guide](#).

Instructions

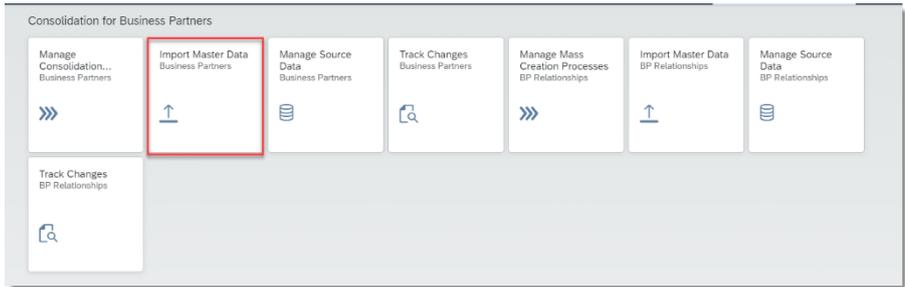
Step 1: Import Spreadsheet File

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*.

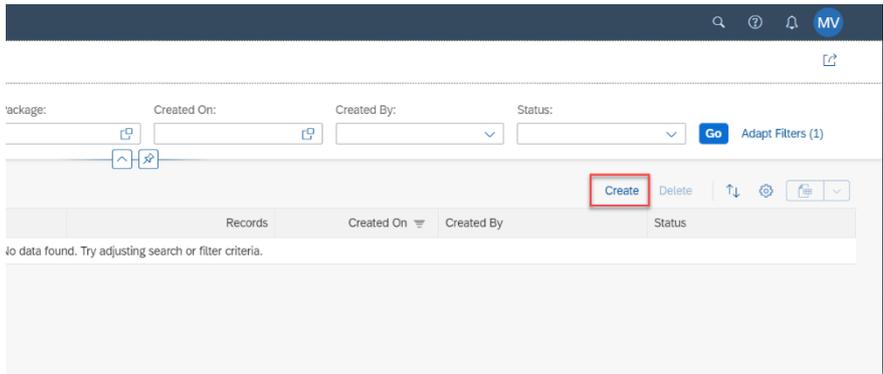


Explanation | **Screenshot**

- 1. Open the Fiori app **Import Master Data Business Partners**



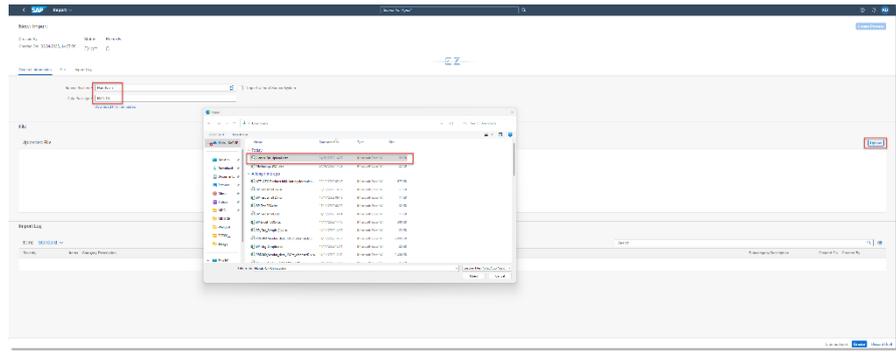
- 2. Click on **Create** to create a new import of the data.



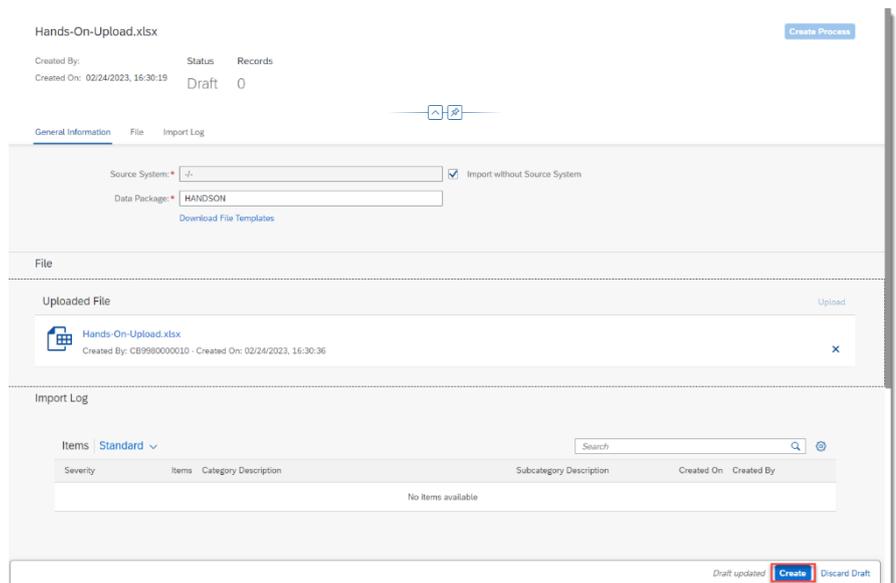
3. Maintain Source System field and Data Package like you want.

4. [Hands-On-Upload-File](#)
Click on **Upload** and select the spreadsheet file, which you have just downloaded from the link above, **Hands-On-Upload-file.xlsx**

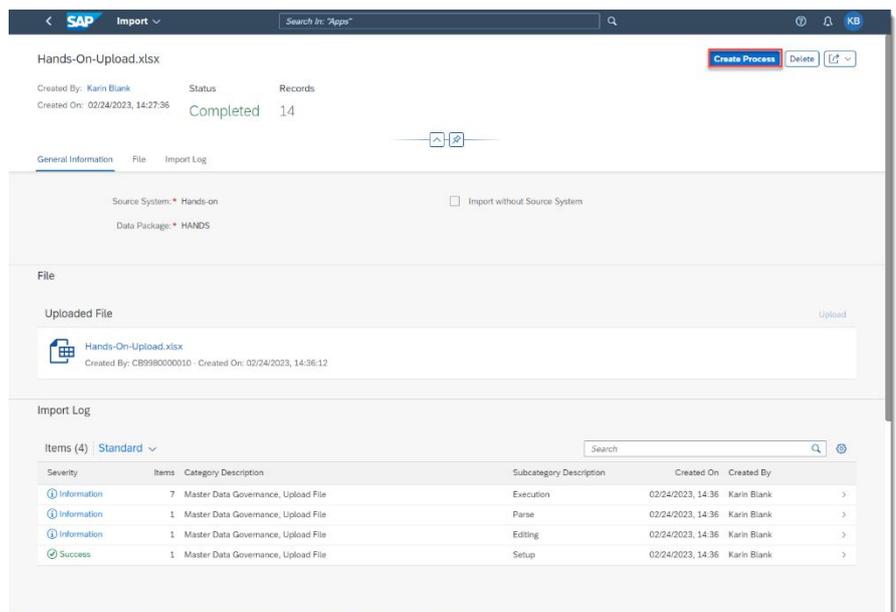
After that click on **Open**.



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



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



7. Input a description and select the process template 'SAP: Consolidate Business Partner Data' click on **Create**.

Create Process

Description:
Upload

Imported Data Source: *
HANDS

Additional Data Sources:
[Add]

Process Template: *
SAP: Consolidate Business Partner Data

Delete source data after process is completed.

Create Cancel

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

Upload
97

Details Data Progress

Process Template: SAP: Consolidate Business Partner Data Data Source: Hands-on
Process Status: Saved (not started) Records: 0%
Process Goal: Consolidation of Source Records 14
Attachments: Files (0)

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

Step Messages Results (Initial Check)

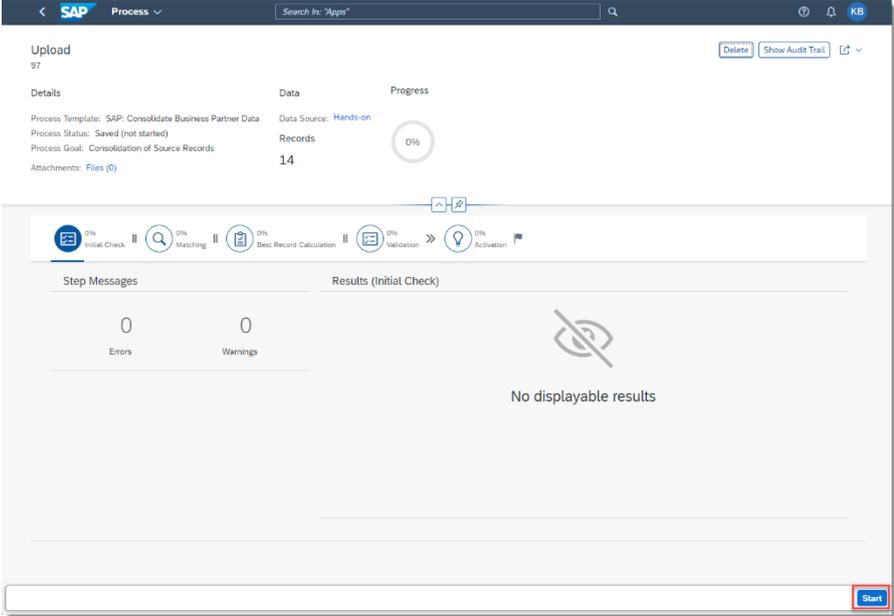
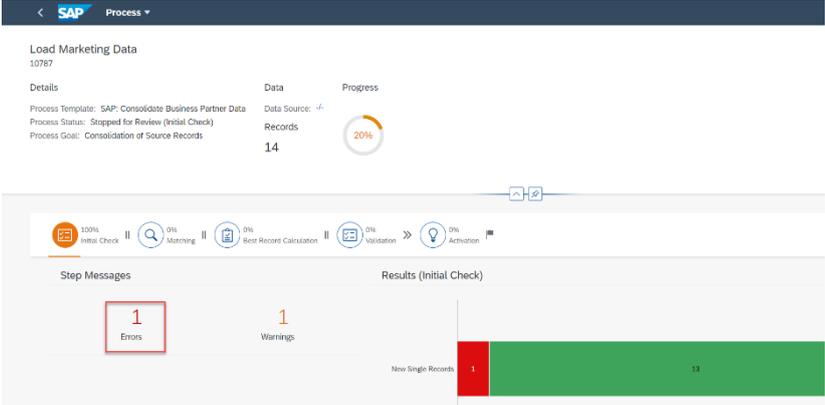
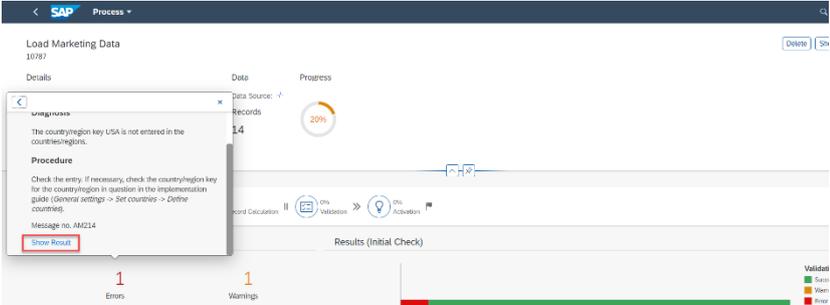
0 Errors 0 Warnings

No displayable results

Start

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 can check all actions inside this process using the audit trail functionality.

| Explanation | Screenshot |
|--|--|
| <p>1. Click on Start to run the consolidation process.</p> |  |
| <p>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.</p> |  |
| <p>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> |  |

- 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 'Load Marketing Data' interface for record 10787. The process goal is 'Consolidation of Source Records' and the step is 'Validation'. There are 14 records in total. The current record is 'Sunrise Solar Shannon Ave 1240 67846 Garden City USA'. A red box highlights the '2 Messages' link in the bottom left corner.

- The error message is shown. The country key **USA** is not defined. Close the popup and navigate to the address tab.

The screenshot shows the same SAP interface as above, but with an error message popup. The message reads: 'Country/region key USA is not defined.' and 'No time zone could be identified for USA region postal...'. A red box highlights the '2 Messages' link in the bottom left corner.

- To correct the wrong country key, click on **Edit**.

The screenshot shows the SAP interface with the 'Addresses' tab selected. The record details are visible, including 'Country/Region: USA'. A red box highlights the 'Edit' button in the top right corner, with a red arrow pointing to it.

- Input **US** and the system shows a suggestion. Accept **US** as country key.

The screenshot shows the SAP interface with the 'Country/Region' field set to 'US'. A suggestion popup is visible, showing 'US' and 'USA' as options. A red box highlights the suggestion popup.

8. Click on **Save**.

The screenshot shows the 'Addresses' tab in SAP. The 'Items (1)' section is filtered by 'Message Type, Log Message Class, and Log Message Number'. A table lists one record with the following details:

| Record Identification | Source System | Source ID | Postal Code | City | Street |
|---|---------------|-----------|-------------|-------------|-------------|
| Surbit Solar Shannon Ave 1240 67846 Garden City USA | . | 9 | 67846 | Garden City | Shannon Ave |

Additional fields include: House Number: 1240, Region: (empty), Country/Region: US, and Changes: 1. The 'Save' button is highlighted with a red box at the bottom right.

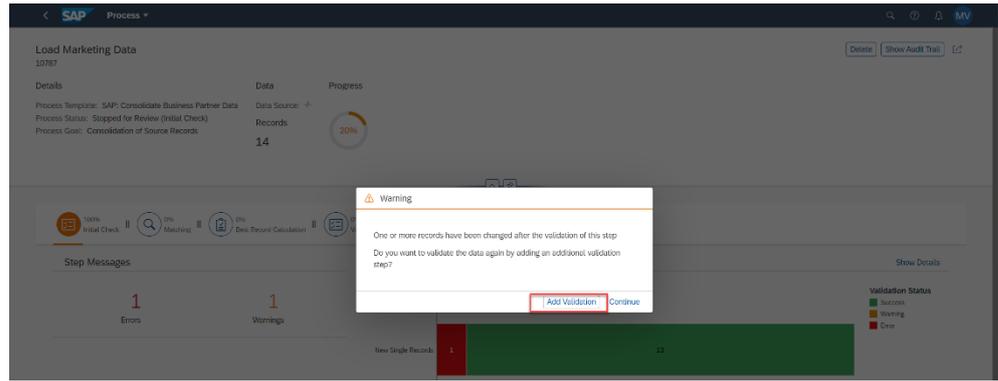
9. Click on the **back icon** to navigate back to the process UI.

The screenshot shows the SAP process navigation interface. The breadcrumb trail is 'SAP > Process > Load Marketing Data'. A red arrow points to the back icon (left-pointing arrow) in the top left corner. The 'Details' section shows 'Process Goal: Consolidation of Source Records' and 'Records: 14'. The 'Addresses' tab is active, showing the same address record as in the previous screenshot.

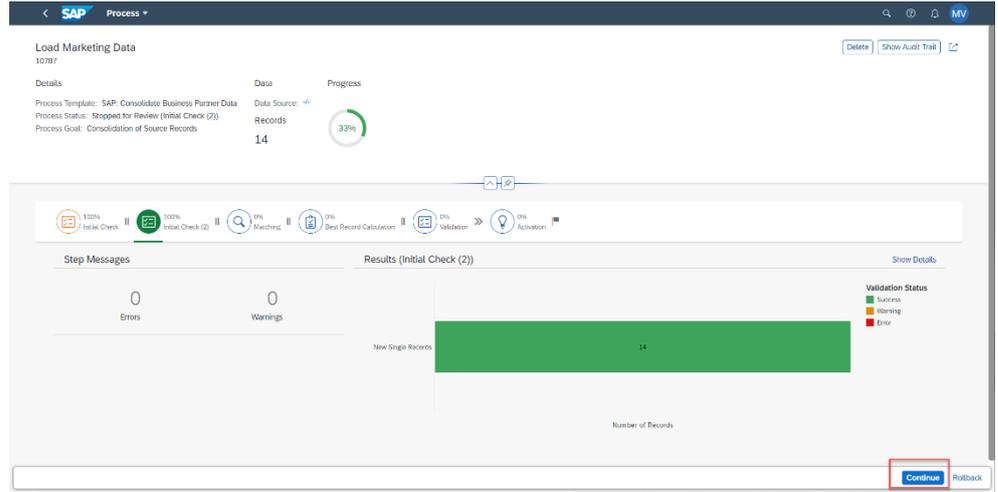
10. Click on **Continue** to run the next step.

The screenshot shows the SAP process progress bar. The breadcrumb trail is 'SAP > Process > Load Marketing Data'. The 'Details' section shows 'Process Template: SAP - Consolidate Business Partner Data' and 'Process Status: Stopped for Review (Initial Check)'. The progress bar shows a 20% completion rate. The 'Step Messages' section shows 1 Error and 1 Warning. The 'Results (Initial Check)' section shows a bar chart with 1 New Single Record (red) and 13 records (green). The 'Continue' button is highlighted with a red box at the bottom right.

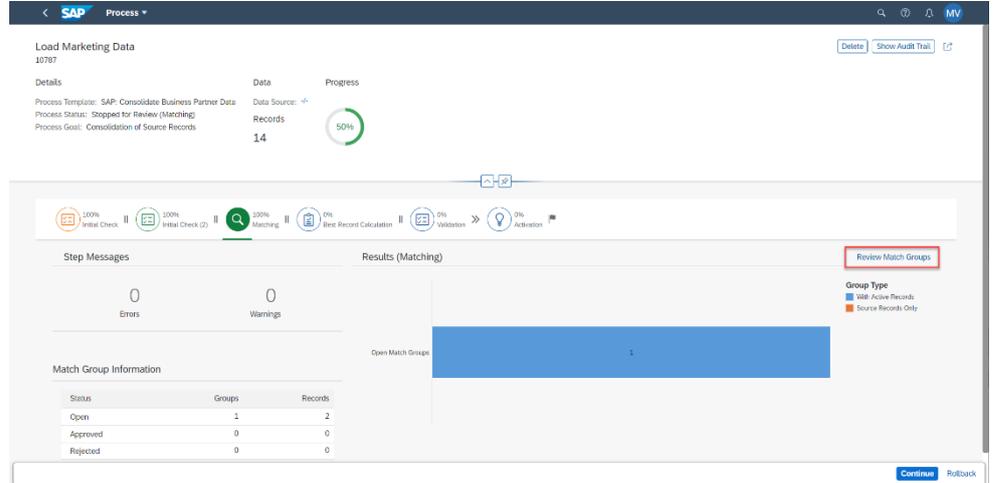
11. The system has identified manual changes and proposes to validate again. Click on **Add Validation**.



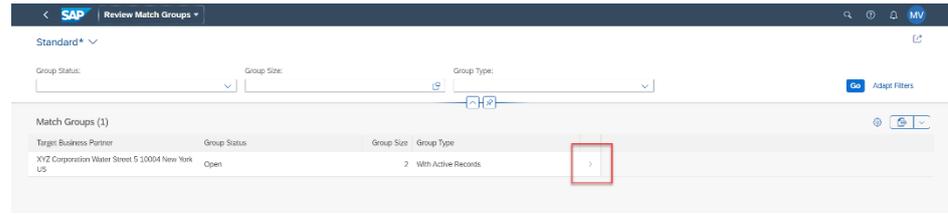
12. The error could be corrected, and the additional validation step has been run successfully. Click on **Continue**.



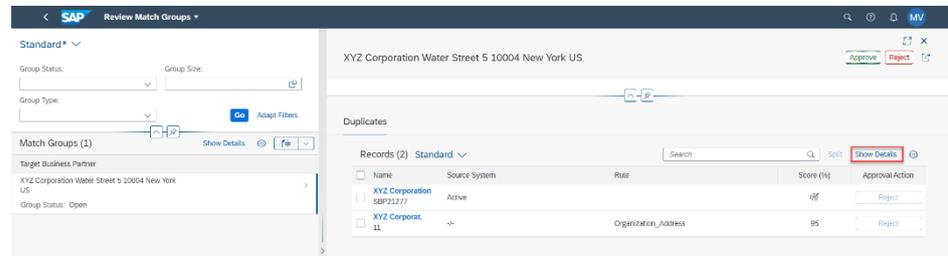
13. In the matching step the system detected a potential duplicate. Click on **Review Match Groups** to review the match result.



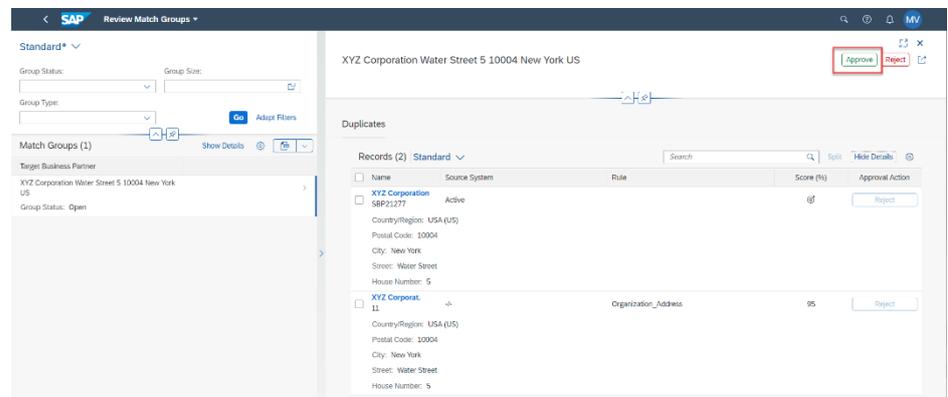
14. The system shows a match group.
Select this match group.



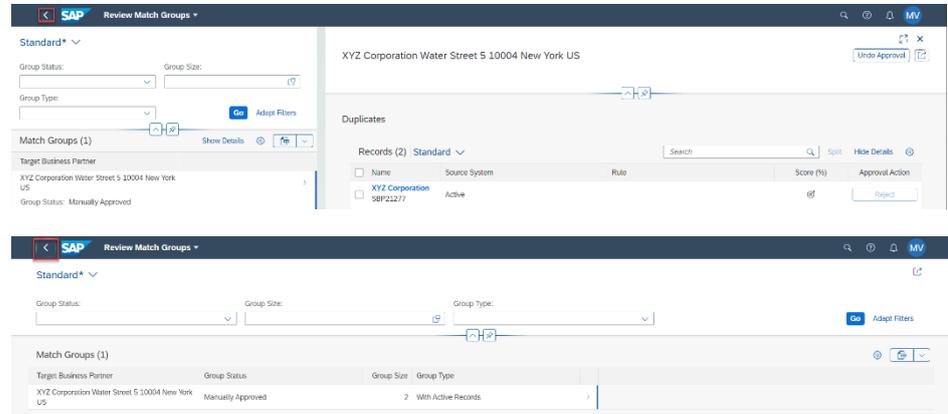
15. You can compare the potential duplicates.
Click on **Show Details** to show all attributes.



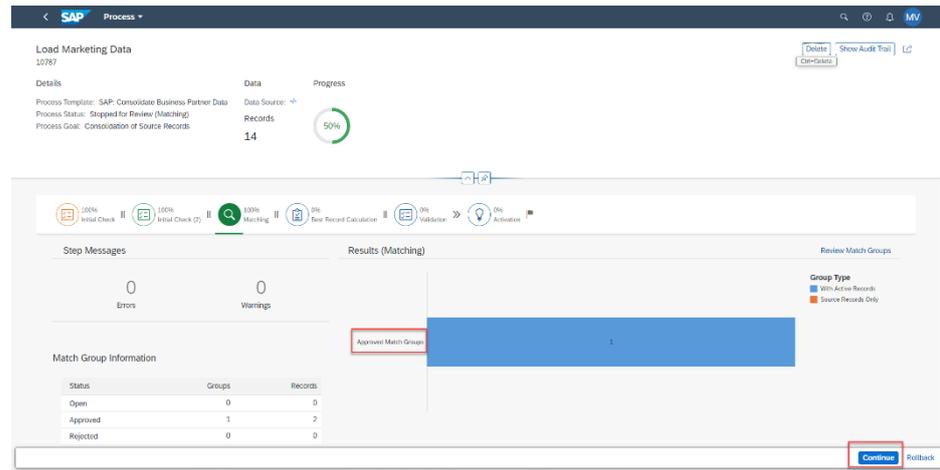
16. It seems to be a real duplicate.
Click on **Approve** to confirm this match group.



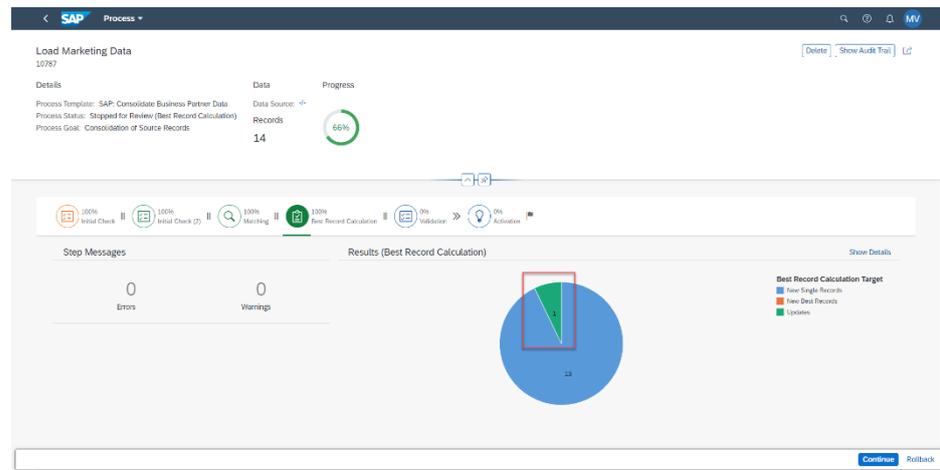
17. Click two times on the **back icon** to navigate back to the process UI.



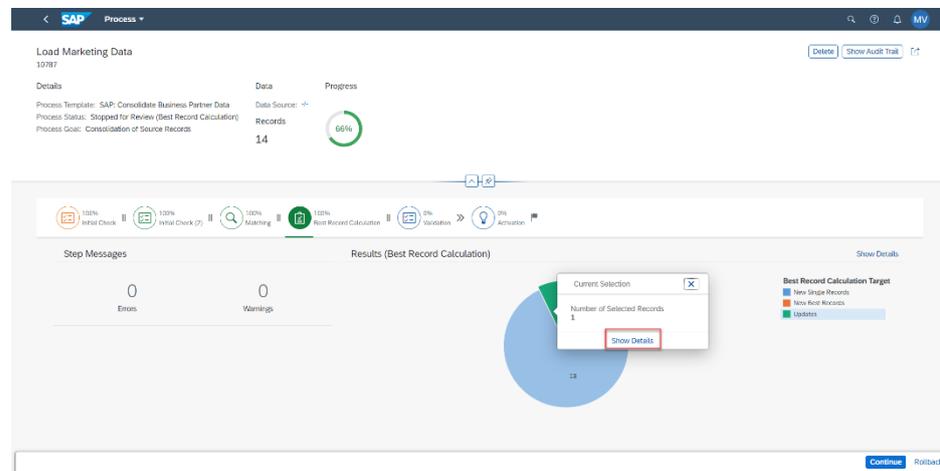
18. Now you see that the match group has been approved. This will lead to a merge of the records in this match group. Click on **Continue** to merge the data in the best record calculation.



19. (Optional) If there is already one of the imported companies in the system, you will see the one record, which will be handled as update in the best record calculation. Click on the **Updates segment** in the chart.



20. (Optional) Click on **Show Details** to display the data.



21. (Optional)
Click on **Phone Numbers** to check the phone data.

Load Marketing Data
10787

Details
Process Goal: Consolidation of Source Records
Process Step: Best Record Calculation

Records: 14

General | Addresses | Address Usages | **Phone Numbers** | Fax Numbers | E-Mail Addresses | Roles | Bank Accounts | Industries

Records (1)

Filtered By: Best Record Calculation Target

| Record Identification | Source System | Source ID | Business Partner | Business Partner Category | Title |
|--|---------------|-----------|------------------|---------------------------|----------------|
| XYZ Corporation Water Street 5 10004 New York US | Active | SBP21277 | SBP21277 | Organization (Z) | Company (0003) |

22. (Optional)
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.

Load Marketing Data
10787

Details
Process Goal: Consolidation of Source Records
Process Step: Best Record Calculation

Records: 14

General | Addresses | Address Usages | **Phone Numbers** | Fax Numbers | E-Mail Addresses | Roles | Bank Accounts | Industries

Items (2)

Filtered By: Best Record Calculation Target

| Record Identification | Source System | Source ID | Telephone Country/Region | Telephone | Extension |
|--|---------------|-----------|--------------------------|-----------|-----------|
| XYZ Corporation Water Street 5 10004 New York US | Active | SBP21277 | USA (US) | 212-67000 | 1 |
| XYZ Corporation Water Street 5 10004 New York US | Active | SBP21277 | USA (US) | 212-11110 | 1 |

23. Click on **Continue** to validate and activate the data of this process.

Load Marketing Data
10787

Details
Process Template: SAP: Consolidate Business Partner Data
Process Status: Stopped for Review (Best Record Calculation)
Process Goal: Consolidation of Source Records

Data: Data Source: +
Records: 14
Progress: 60%

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: 13
- New Dest. Records: 0
- Updates: 1

Continue | Rollback

24. The data has been activated successfully. Click on **Audit Trail** to check all actions of this consolidation process.

Load Marketing Data
10787

Details
Process Template: SAP: Consolidate Business Partner Data
Process Status: Completed
Process Goal: Consolidation of Source Records

Data: Data Source: +
Records: 14
Progress: 100%

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

Step Messages: 0 Errors, 0 Warnings

Results (Activation)

Activation Result

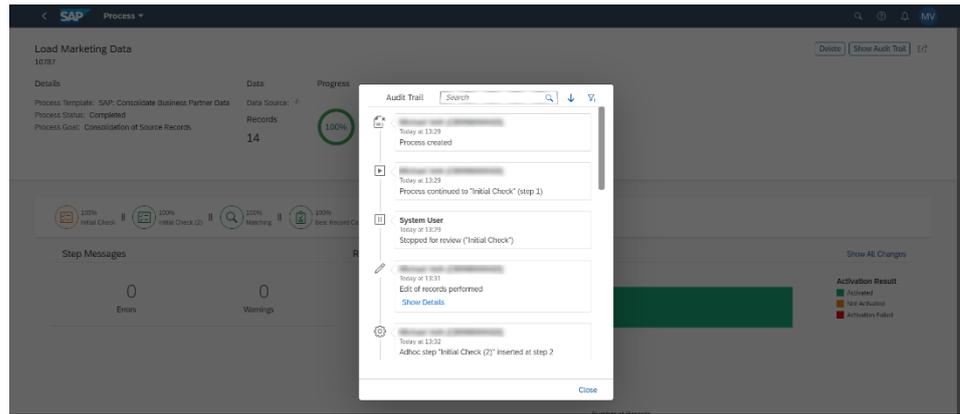
- Activated: 13
- Not Activated: 0
- Activation Failed: 0
- Updates: 1

Number of Records

Audit Trail

25. You see all relevant actions.

Congratulations! You finalized a consolidation process in SAP Master Data Governance, cloud edition.



Now you can continue with the next exercise. www.sap.com.

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