




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

Exercise 2 Central Governance



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This exercise is part of the guided tour to get *Hands-On Experience on SAP Master Data Governance, cloud edition*. All exercises can be accessed via the SAP Community blog post “SAP Master Data Governance, cloud edition: Getting Hands-on Experience on a Guided Tour”, published under [MDGupdates2021](#).

BEFORE YOU START

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

Objective of this Exercise

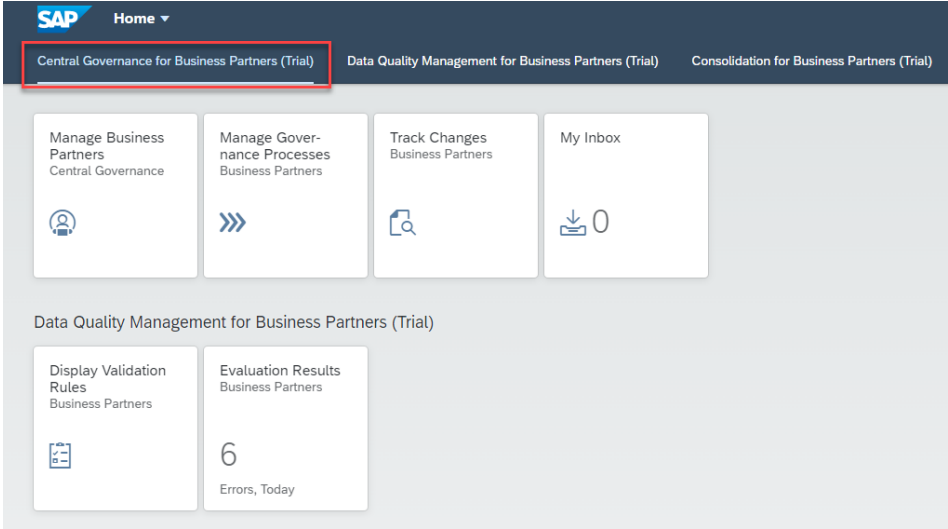
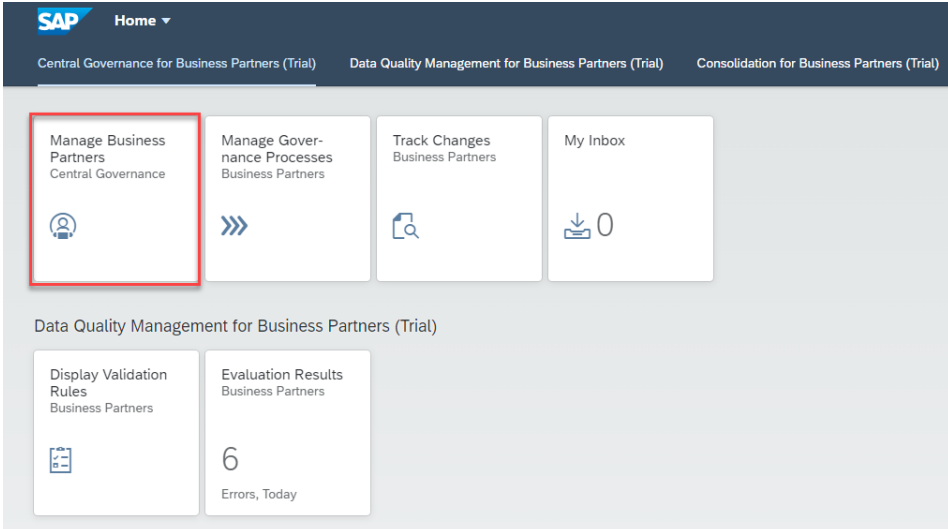
In this exercise, you will learn the basics for working with the central governance capabilities of SAP Master Data Governance, cloud edition. You will start by creating a business partner. Then you will execute a check for duplicates to check whether there are any possible duplicates in the system. 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

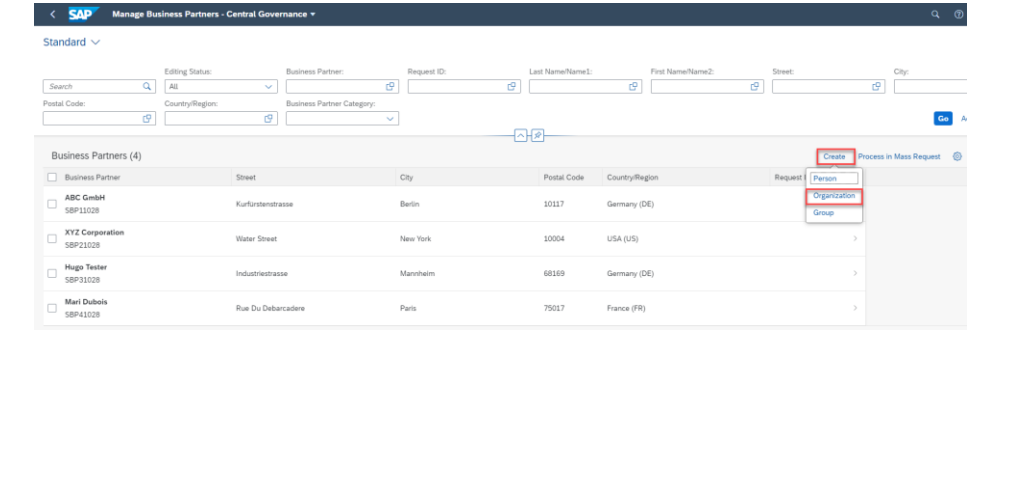
Step 1: Create Business Partner

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

Explanation	Screenshot
<p>1. Open the group Central Governance for Business Partner (Trial)</p>	 <p>The screenshot shows the SAP Fiori home page. At the top, there is a navigation bar with the SAP logo and a 'Home' dropdown menu. Below the navigation bar, there are three tabs: 'Central Governance for Business Partners (Trial)', 'Data Quality Management for Business Partners (Trial)', and 'Consolidation for Business Partners (Trial)'. The 'Central Governance for Business Partners (Trial)' tab is highlighted with a red box. Below the tabs, there are four main tiles: 'Manage Business Partners Central Governance', 'Manage Governance Processes Business Partners', 'Track Changes Business Partners', and 'My Inbox'. Below these tiles, there is a section for 'Data Quality Management for Business Partners (Trial)' with two sub-tiles: 'Display Validation Rules Business Partners' and 'Evaluation Results Business Partners' showing '6 Errors, Today'.</p>
<p>2. Click on the Fiori tile Manage Business Partners – Central Governance.</p>	 <p>The screenshot shows the same SAP Fiori home page as above. In this view, the 'Manage Business Partners Central Governance' tile is highlighted with a red box. The rest of the page layout, including the navigation bar, tabs, and other tiles, remains the same.</p>

Explanation	Screenshot
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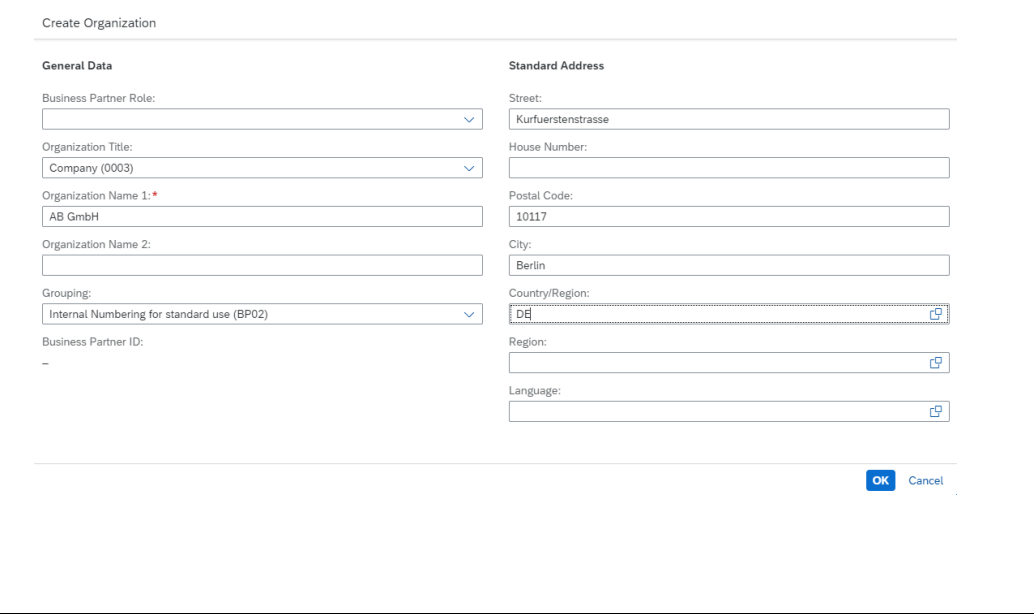
3. Click on the **Create** button and select **Organization** in the list.



4. Quick Create dialog is open. Enter following information:

- Organization Title: **Company (0003)**
- Organization Name1: **AB GmbH**
- Street: **Kurfuerstenstrasse**
- Postal Code: **10117**
- City: **Berlin**
- Country/Region: **DE**

Then, click on **OK** button.



Explanation	Screenshot
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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**

The screenshot shows the 'New Business Partner' form in SAP. The 'General Information' section is visible. The 'Search Term 1' and 'Search Term 2' fields are highlighted with a red box and contain the value 'AB'. Other fields include 'Business Partner' (empty), 'Grouping' (Internal Numbering for standard use (BP02)), 'Title' (Company (0003)), 'Organization Name 1' (AB GmbH), and 'Legal Entity' (empty).

6. On the upper right corner, click on the **Duplicate Check** button to check potential duplicates.

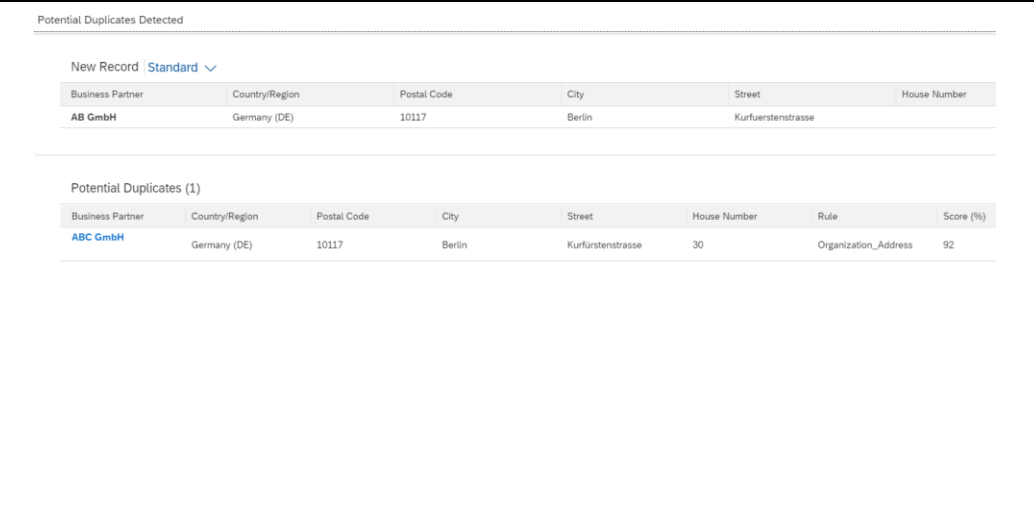
The screenshot shows the search results for the Business Partner. The 'Duplicate Check' button is highlighted with a red box. The search criteria include 'Search Term 1' (AB) and 'Search Term 2' (AB). The results show a single entry with 'Request Template: SAP: Single Request BuPa w/ Rework'. The 'Duplicate Check' button is located in the upper right corner of the search results area.

Explanation	Screenshot
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7. In case any potential duplicates are detected, a dialog will be open and displays two tables view.

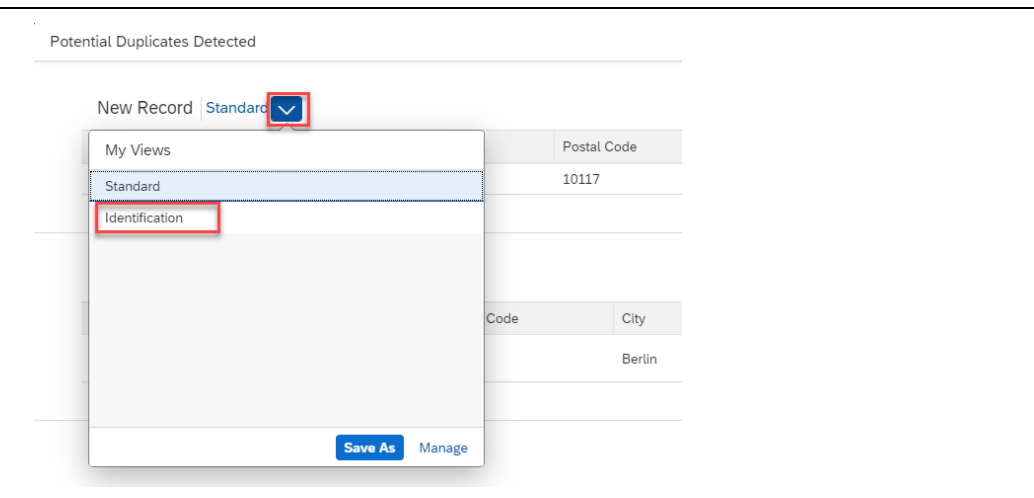
New Record describes the Business Partner which you are working on.

Potential Duplicates shows detected duplicates in the system with match score in percentage.



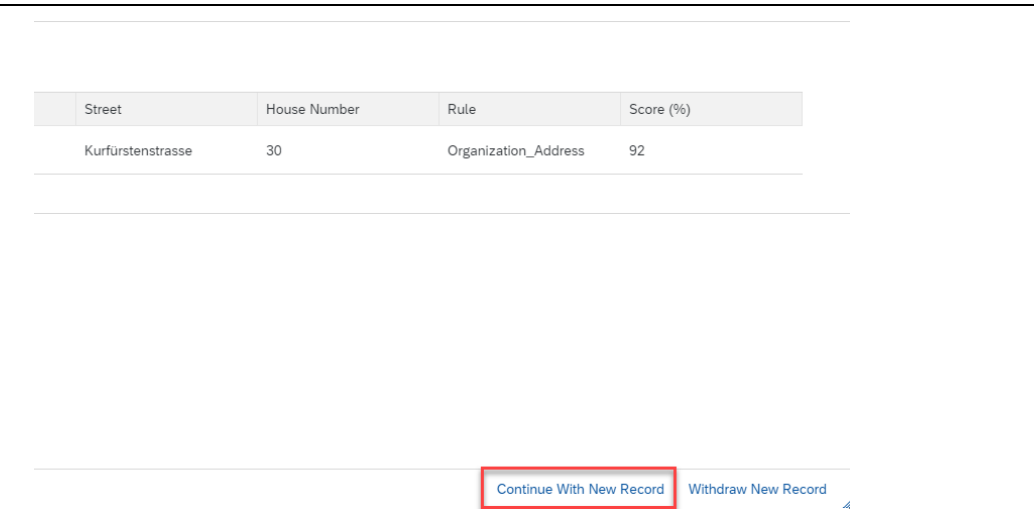
8. The variant 'Standard' displays the address data.

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

The screenshot shows a form titled 'Address' with several input fields. The 'Standard Communication' section is highlighted with a red box. It includes fields for 'Preferred Communication', 'Telephone Extension', 'Fax Country/Region', 'Telephone Country/Region', 'Cell Phone Country/Region', 'Fax', 'Telephone', and 'Cell Phone'. The 'Standard Communication' label is highlighted with a red box.

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.


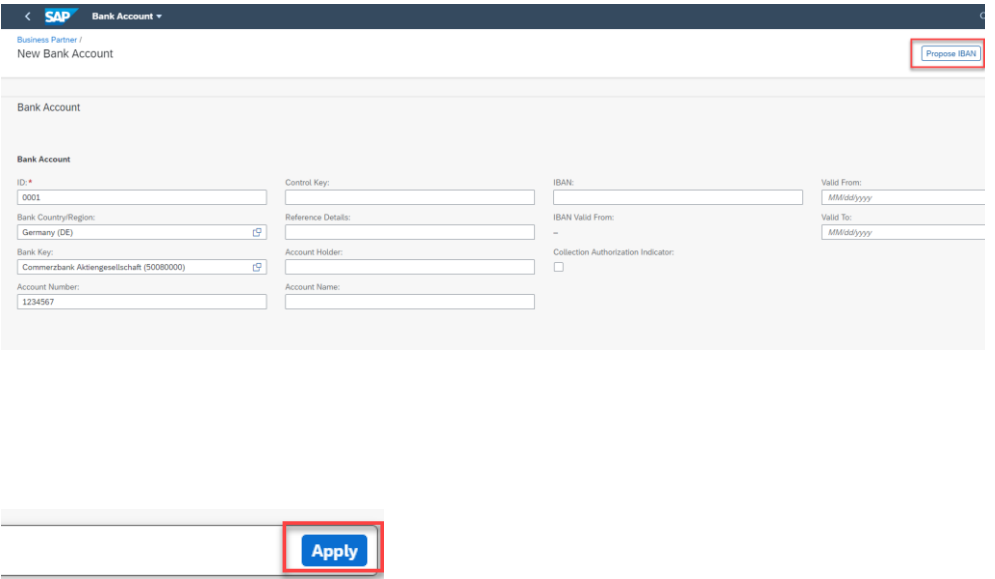
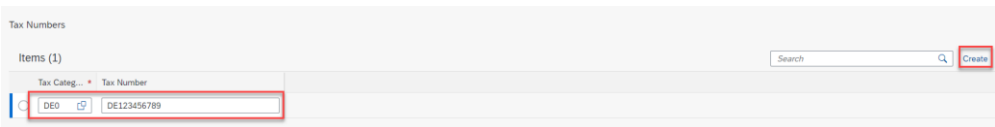
Note that, if more than one communication data, e.g. two telephone numbers are entered, one entry should be standard. As default, the first entry is set as standard. You can change the standard by using **Set to Standard** button. This button will be abled when you select on communication data.

Click on the **Apply** button to back to the business partner page.

The screenshot shows the 'Address Details' page. It features a table with one row of communication data. The 'Create' button is highlighted with a red box. Below the table, there is a 'Telephone' section with a table of telephone numbers. The 'Apply' button is highlighted with a red box.

Address	Country/R...	Standard	Valid From	Valid To	
Kurfuerstenstrasse 10117 Berlin	DE	Yes	11/08/2021	12/31/9999	>

Country/R...	Country/Reg...	Telephone	Extension	Standard
DE	49	030353533		Yes
DE	49			No

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

Explanation	Screenshot
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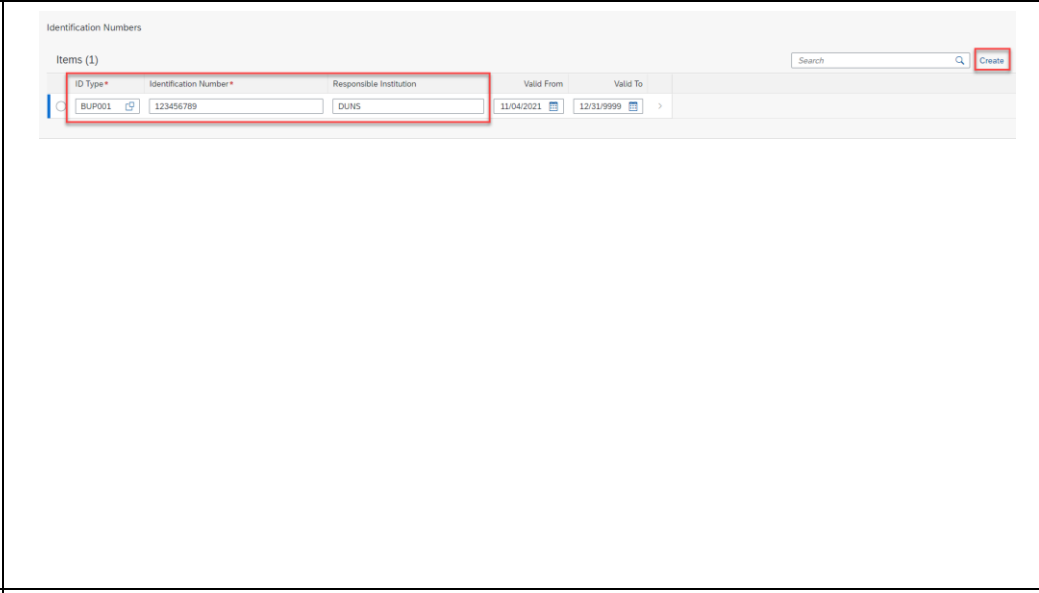
15. Go to Identification Numbers and click on the **Create** button.

Select ID Type and enter Identification Number as well as Responsible Institution.

ID Type: **BUP001**

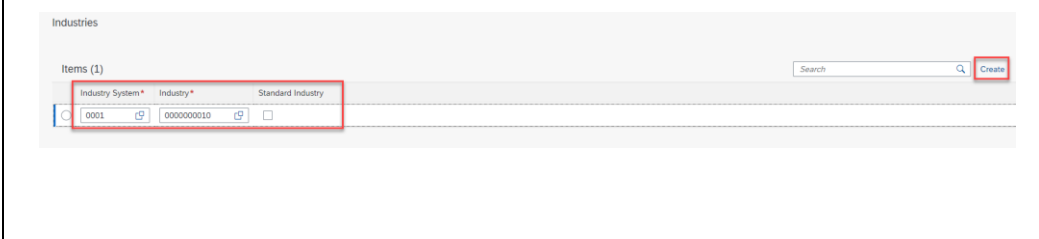
Identification Number: **Any number**

Responsible Institution: **Name of institution**



16. Go to Industries and click on the **Create** button.

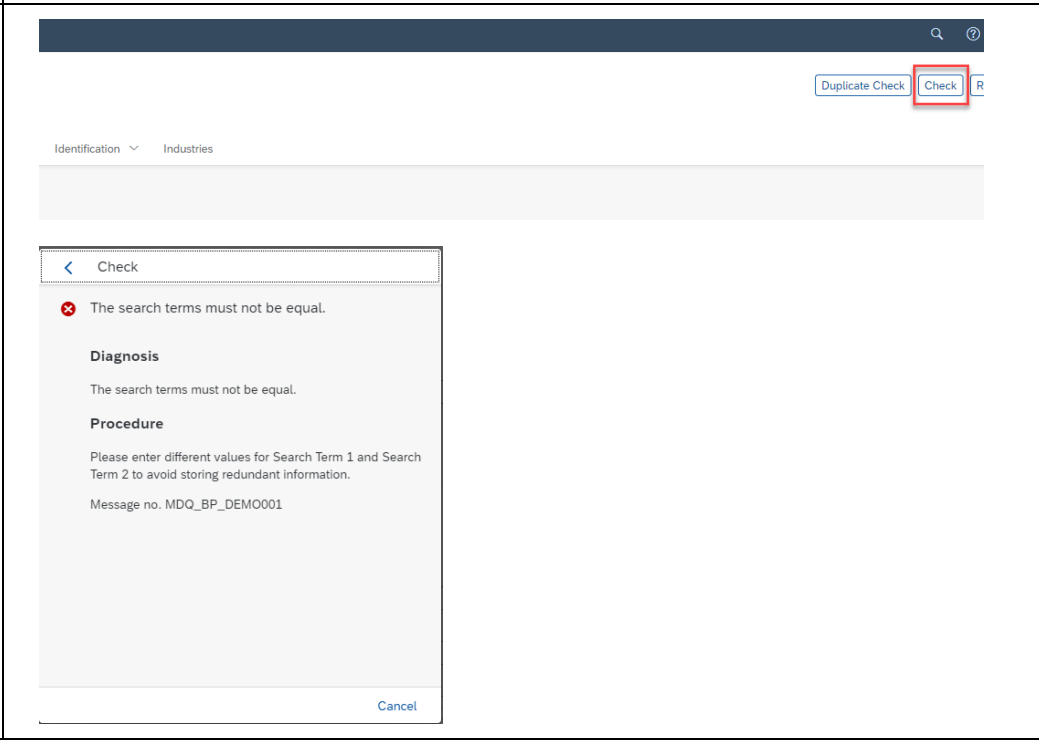
Select Industry System and Industry using F4 Help.



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
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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.

General Information

Business Partner: -

Grouping: Internal Numbering for standard use (BP02)

Title: Company (0003)

Organization Name 1: AB GmbH

Organization Name 2:

Search Term 1: AB

Search Term 2: AB BERLIN

Legal Form:

Legal Entity:

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.

Save and Submit Save Cancel

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.

SAP Business Partner

AB GmbH

Grouping: Internal Numbering for standard use (BP02) Standard Address Standard Communication
 Business Partner Category: Organization (2) Kufuerstenstrasse 10117 Berlin DE +49 030-353533

Request Information General Information Address Roles Bank Accounts Identification Industries

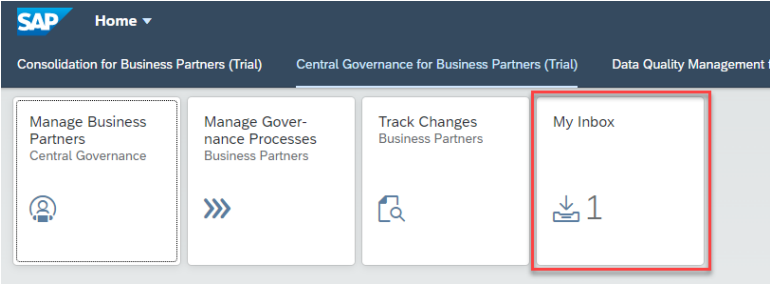
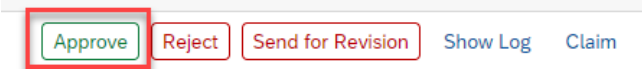
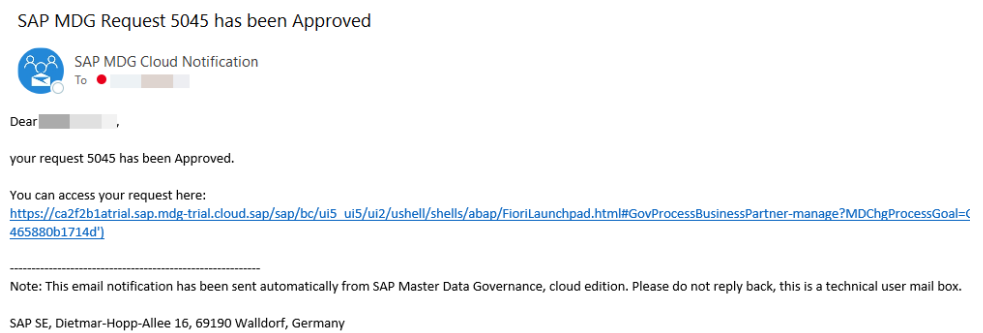
Request Information

Request ID: 5045 Description: Single Request Request Template: SAP: Single Request BuPa w/ Rework



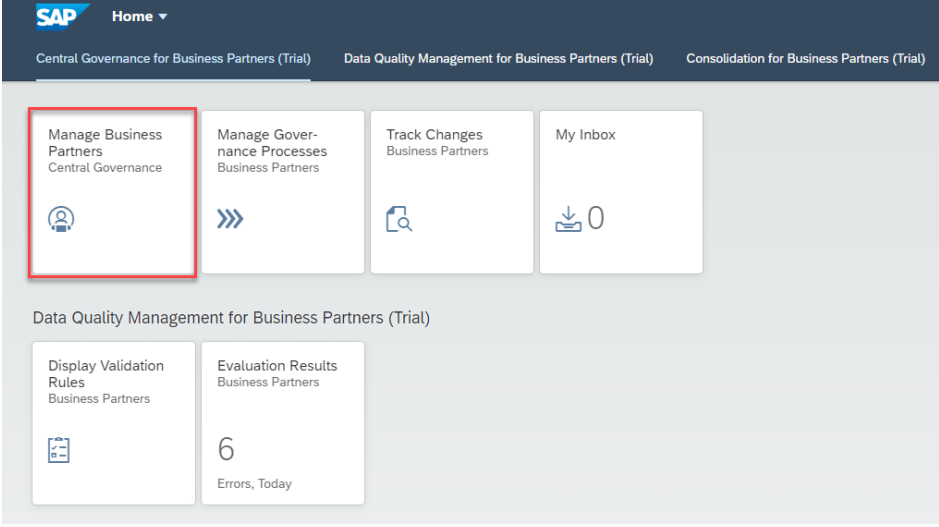
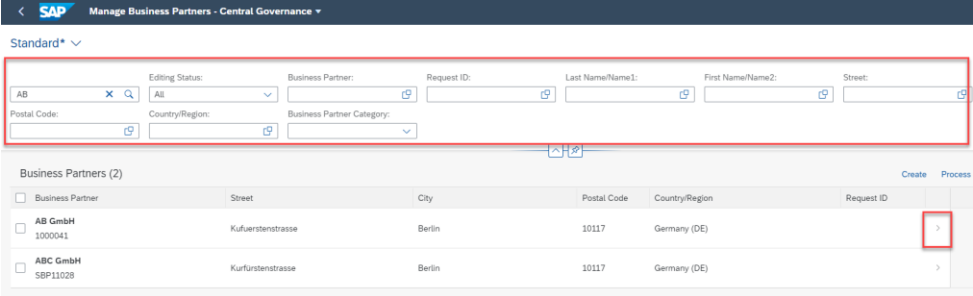
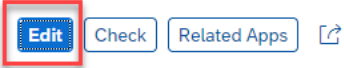
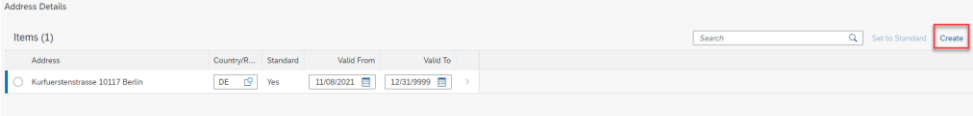
Step 2: Approve *Business Partner*

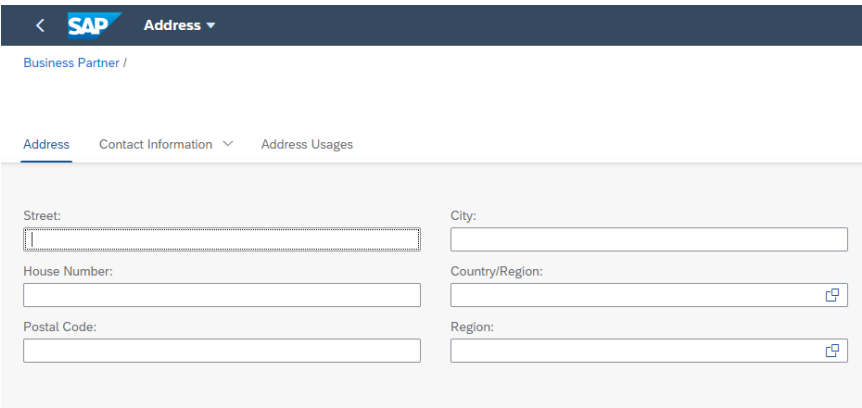
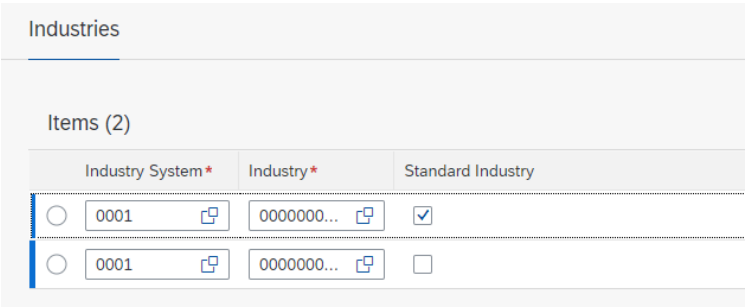
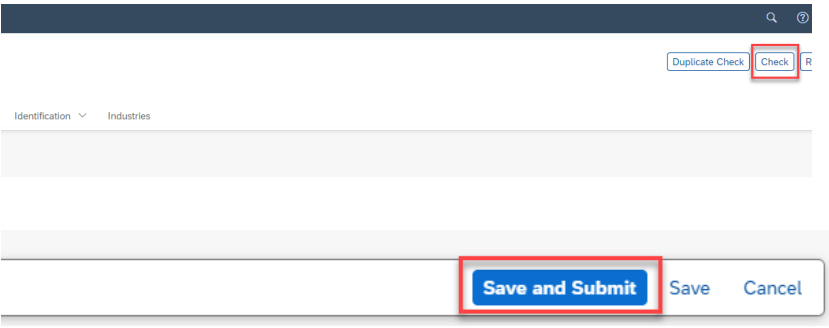

In the previous step, you submitted a request to create a business partner. In this exercise you play the approver role as well. Being also the approver, you will get a workflow task in your workflow inbox. You check your workflow inbox and approve the request.

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

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
<p>1. Open the group Central Governance for Business Partner (Trial) and click on the Fiori tile Manage Business Partners – Central Governance</p>	 <p>The screenshot shows the SAP Fiori dashboard for 'Central Governance for Business Partners (Trial)'. The 'Manage Business Partners' tile is highlighted with a red box. Other tiles include 'Manage Governance Processes Business Partners', 'Track Changes Business Partners', 'My Inbox', 'Display Validation Rules Business Partners', and 'Evaluation Results Business Partners'.</p>
<p>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.</p> <p>Search result shows business partners. Find your business partner AB GmbH and click on the > icon to go into single request.</p>	 <p>The screenshot shows the 'Manage Business Partners - Central Governance' search results page. The search criteria are highlighted with a red box: 'AB' in the search field, 'All' in the dropdown, and 'Business Partner' in the category. The search results table shows two entries: 'AB GmbH' and 'ABC GmbH'. The 'AB GmbH' entry is highlighted with a red box, and the '>' icon in the right column is also highlighted with a red box.</p>
<p>3. Your business partner will be displayed. Click Edit button in the upper right corner.</p>	 <p>The screenshot shows the 'Edit' button highlighted with a red box. Other buttons visible are 'Check', 'Related Apps', and a share icon.</p>
<p>4. Go to Address Details table and click on the Create button. It navigates to address details page.</p>	 <p>The screenshot shows the 'Address Details' page. The 'Create' button is highlighted with a red box. The table below shows one address entry: 'Kurfuerstenstrasse 10117 Berlin'.</p>

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

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