SAP MASTER DATA GOVERNANCE – FRAMEWORK CONFIGURATION AND UI PERSONALIZATION

EIM261

Exercises / Solutions
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INTRODUCTION

With its domain-specific out-of-the-box applications, SAP Master Data Governance provides instant support for central maintenance scenarios of supplier, customer, material, and financial master data. Additionally, the application foundation of SAP Master Data Governance can be used for other data domains and to support customer-specific data management scenarios. Thus, this application can be the common platform within your organization to provide governance around all of your master data. In this session, you will be introduced to the concepts of SAP Master Data Governance's application foundation and will learn to:

- personalize and configure the user interface (layout changes, default settings, context based adaptations)
- adapt a specific process step (checks, derivation)

Session Outline

This session is split into two blocks of exercises.

**Block A – User Interface Personalization and Configuration in MDG for Materials**

Exercise 1 – Personalize the UI (Layout changes and Defaulting)
Exercise 2 – Configure the UI (Context Based Adaptation)

**Block B – Process Configuration (Adapt Process Steps) in MDG for Materials**

Exercise 3 – Simplify the Process (Checks)
Exercise 4 – Simplify the Process (Derivation)

Naming of objects

All objects of this exercise are named with a prefix ID for uniqueness. Please substitute the placeholder ## with the ID that matches to your group number: ## = Group number from 01 – 60

Naming Convention

This exercise uses the naming convention below.

<table>
<thead>
<tr>
<th>Configuration Setting</th>
<th>Example of ID / Name (for group 60)</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Role</td>
<td>Z60_SAP_MDGM_MENU</td>
</tr>
<tr>
<td>FPM UI Configurations</td>
<td>Z60_RERP39_BS_MAT_INIT</td>
</tr>
<tr>
<td></td>
<td>Z60_BS_MAT_OVP</td>
</tr>
<tr>
<td>Change Request Types</td>
<td>Z60MAT01</td>
</tr>
</tbody>
</table>
Logon information
Replace ## with your two-digit group number

- Logon to the SAP System M10 Client 800
- Username: EIM261-##
- Password: welcome

Logon with SAP NetWeaver Business Client 3.5
Please logon to the system using SAP NetWeaver Business Client – Desktop (NWBC) in version 3.5 from the start menu or using the shortcut on the desktop:

Do not use NWBC 4.0

NWBC 4.0 uses a new design and layout, so that you will not be able to follow the description of the exercise and particularly the screenshots in the solution section.
EXERCISE 1 – PERSONALIZE THE UI

Objective of this exercise is to change the standard (one column) layout of your User Interface to a two column layout and to use some of your input as default settings.

Perform these steps:

1. Start the SAP NetWeaver Business Client
2. Select “Material Governance” / Change Requests / Material Processing / Create Material
3. Material: “p-100-##” / Change Request Type: “MAT01”
4. Select “Personalize”
5. Select a two column layout and re-arrange your user interface
6. Set a default for the “Base Unit of Measure”
**Exercise 1: Step-by-step Solution**

Start the SAP NetWeaver Business Client

Select “Material Governance” / Change Requests / Material Processing / Create Material

Create Material

Material: “p-100-##” / Change Request Type: “MAT01”

Standard Layout
Personalize
Select “Personalize”

Select a two column layout for “Section 2”.
Move “Descriptions”, “Basic Text”, “Design Data” and “Internal” to “Column 2”.
Select “Stackable” and move “Basic Text” and “Design Data” into “Stack 1”.

Layout Changed
Set Default
Select “KG” as “Base Unit of Measure” in your Material “p-100-##”.

Cancel the creation.

Create Material “p-100-##B”. The “Base Unit of Measure” is already defaulted.

Exercise 1 Completed!
You personalized your user interface.
EXERCISE 2 – CONFIGURE THE UI (CONTEXT BASED ADAPTATION)

Objective of this exercise is to configure the User Interface based on the context - e.g. the UI should provide specific UI Building Blocks for a raw material (material type = “ROH”).

Note: The configuration would be valid for all users (this is the difference between configuration and personalization which was shown in Exercise 1). To enable each user to do work on his own configuration in this exercise, everybody will get a user specific UI configuration.

Perform these steps:

Change your Role

Check your MENU role with transaction SU01 or PFCG. Enter your role and click on change. Go to tab Menu and open the hierarchy. Find the Application configuration of the initial screen at Create Material by clicking on Details. Change the delivered Application configuration BS_MAT_INIT to Z##_RERP39_BS_MAT_INIT, which is already created for you. Save your role.

New Application/Application configuration of the initial screen: __________________________

Check the Customizing

Check in the customizing your actual Target Application/Target UI configuration. (MDGIMG - > Master Data Governance-> General Settings-> Process Modeling-> Business Activities-> Link Actions with UI Application and Business Activity: Custom Definition)

Target Application/Target UI configuration from customizing: __________________________

Configure your own UI Configuration

Delete Design Data Fields which you do not have under governance:

Mark the UIBB: Design Data. Click on Configure UIBB. Switch off the Attributes. In the Form UIBB Schema delete the Element FERTH. Save it with Package Z_RERP39.

Fields, which you deleted in your UI configuration: __________________________

Use breadcrumbs to go back to your OVP_LAYOUT.

Hide complete UI Building Block

Mark the UIBB: Internal Comment. Click on Attributes. Choose Hidden and Excluded from Event Loop for Hidden Element. Save your configuration.

UIBB, which you made invisible in your UI configuration: __________________________
Context Based adaptations (CBA)

You want to adapt the UI dependent on entered data. You want to hide the fields for Classification for Material type ROH. Go to your UIBB for Basic Data. Create an adaptation for the material type ROH. Click on Adaptations. Click on the Add button. Deselect Non-Specific for Material Type and enter ROH. Save it as Local Object.

Mark sure, that your adaptation is marked. Now you can adapt the UI.

Delete Fields for Configuration

Mark the UIBB Basic Data and Click on Configure UIBB. Delete the group Configuration and change Label Text of others.

Fields, which you deleted: ____________________________________________

Fields, where you changed the Label Texts: ________________________________

Change Tool Tip

Mark the Element BEGRU and click on Attributes. Change the tool tip.

Tool Tips, which you changed in your UI configuration: _____________________

Link your User and your new UI Configuration

Check your role again with transaction SU01 or PFCG. Enter your role and click on Display. Go to tab Menu and open the hierarchy. Find the Application configuration of the initial screen at Create Material by clicking on Details. Make sure the Application configuration is Z##_RERP39_BS_MAT_INIT.

Go to the customizing (MDGIMG -> Master Data Governance-> General Settings-> Process Modeling-> Business Activities-> Link Actions with UI Application and Business Activity: Custom Definition).

Select your entry: BO type 194, Action CREATE, Current Application MDG_BS_MAT, Current UI Configuration Z##_RERP39_BS_MAT_INIT. Change the Target UI configuration from BS_MAT_OVP to your new created UI configuration Z##_BS_MAT_OVP of your group.

Go to the customizing (MDGIMG -> Master Data Governance-> General Settings-> Process Modeling-> Business Activities-> Link Actions with Business Activity: Custom Definition).

Create a new entry for UI Application Name MDG_BS_MAT_OVP and your new UI Configuration Z##_BS_MAT_OVP with action CREATE and Business Activity MAT1.

Create a new material

Go to the NWBC Home Page Material Governance and click on Create Material. Choose Change Request Type MAT01. Check, if your UI is used.
Exercise 2: Step-by-step Solution

Launch transaction SU01 for User Maintenance.

In transaction SU01, please enter your User ID and press “Display”. Navigate to the “Roles” tab. You will see (at least) the following roles assigned to your user:
Change your Role “Z##_SAP_MDGM_MENU”

Navigate to role “Z##_SAP_MDGM_MENU” (from the User Maintenance or via transaction PFCG). Change Menu Entry “Create Material”: Set Application Configuration to “Z##_RERP39_BS_MAT_INIT”.

![Display Roles](image)

![Web Dynpro Application](image)
This entry ensures that all groups have their own entry point which means that everybody works on his own copy without interfering with others.
Configure your own UI Configuration

SE80 Package **MDG_BS_MAT_UI**: Select Web Dynpro -> Web Dynpro Applications -> MDG_BS_MAT_OVP -> Application Configurations -> Z##_BS_MAT_OVP. Click on “Display Configuration”.

Note: It is planned to include the UI Configurations in the MDG IMG (UI Modeling) so that it will no longer be necessary to use SE80.

Navigate to the Configuration **Z##_BS_MAT_OVP_LAYOUT**.
Step 1: Delete Fields which you do not want to govern

Close “General Settings” and “Preview”. Go To “Overview Page Schema” and open “MAT_SECTION”. Mark the UIBB (UI Building Block) “Design Data”. Change to Edit Mode and click on Configure UIBB.

In the Form UIBB Schema delete the Element “Prod./insp. Memo” (FERTH).

Save and create a new transport request if necessary.

Technical Information:
- Object Type: WDCC
- Object Name: Z53_MDG_BS_MAT_DESIGN_DATA 00
Step 2: Hide complete UI Building Block

Use breadcrumbs to go back to your OVP_LAYOUT.

Change to Edit Mode if necessary. Mark the UIBB: Internal Comment. Click on (Attributes) if not already shown at the bottom of the screen. Choose Hidden and Excluded from Event Loop for Hidden Element. Save.

Hint: Ignore error message for connector class.
Step 3: Context Based adaptations (CBA)

You want to adapt the UI dependent on entered data. You want to hide the fields for Classification for Material type ROH. Go to your UIBB for Basic Data.

Create an adaptation for the material type ROH. Click on (Adaptations). Click on the “Add” button. Deselect “Non-Specific for Material Type” and enter ROH.

Save it as Local Object. Mark sure, that your adaptation is marked. Delete the group for Configuration. Save.
Step 4: Change Field Labels
Close Preview and open “Form UIBB Schema”. Change Label Text for Material Number and Material Group.

Step 5: Change a Tool Tip
Mark the Element Authorization Group (BEGRU) and click on (Attributes) if not already open. Change tool tip.

Save your UI Configuration. You can already review your changes in the Preview.
Link your UI Configuration

Go to the customizing (MDGIMG – > Master Data Governance – > General Settings – > Process Modeling – > Business Activities – > Link Actions with UI Application and Business Activity: Custom Definition).

Select your entry: BO type 194, Action CREATE, Current Application MDG_BS_MAT, Current UI Configuration Z##_RERP39_BS_MAT_INIT. Change the Target UI configuration from BS_MAT_OVP to your new created UI configuration Z##_BS_MAT_OVP of your group.
Go to the customizing (MDGIMG - > Master Data Governance-> General Settings-> Process Modeling-> Business Activities-> Link Actions with Business Activity: Custom Definition).

Check the entries for UI Application MDG_BS_MAT and MDG_BS_MAT_OVP and your new UI Configurations.
Go to user maintenance (SU01) and remove role “SAP_MDGM_MENU”. This will ensure that your role Z###_SAP_MDGM_MENU is used.

Restart the NetWeaver Business Client. Navigate to “Create Material”. Enter Material type RAW (ROH) and check if the adaptation (and other changes) are active:
You can also check if your UI configuration is used by a right-click and displaying the technical help:

**Exercise 2 Completed!**

You configure the user interface (including Context Based Adaptations).
EXERCISE 3 – SIMPLIFY THE PROCESS (DISABLE CHECKS)

Objective of this exercise is to postpone the required input of the material type. The requester is no longer forced to put in the material type, leaving this task to the material specialist.

Perform these steps:

1. Adapt “Change Request Step Properties” for the first change request step
   a. Turn off Reuse Area Checks
   b. Turn off required field check for material type
2. Verify your process (for requester and material specialist)

Note: In order to simplify the process for the requester, a different UI (with less attributes) could be used here as well. This is covered in “EIM262 Workflow Design in SAP Master Data Governance”.
Exercise 3: Step-by-step Solution

Go to the customizing (MDGIMG -> Master Data Governance -> General Settings -> Process Modeling -> Change Requests -> Configure Properties of Change Request Step).

Select Change Request Type “Z##MAT01”, Step “00” (Processing). Select “Enhancements and Checks”. Uncheck the “Relevant” checkbox for the Reuse Area Check.

Note: this should never be done for the last step (as the system has to check the consistency of the data before activating the Change Request.)
Select “Entity Types per Change Request Step”, Entity Type “MATERIAL”, Attribute “MTART”, Field Properties “No Required Field Check”.

Create a Material, choose Change Request Type “Z##MAT01”:

Material Type is no longer a required field.
HINT: if it does not work immediately, restart the NetWeaver Business Client.
Objective of this exercise is to use a derivation to populate attributes depending on the material type.

Perform these steps:

1. Use Derive Trigger Function
2. Create Ruleset
3. Create Rule, checking Material Type and Change Request Type
   - If material type = FGTR (Drinks) and
   - if change request type is Z##_MAT01
   - set laboratory to “002”

HINT: The change request type is needed to differentiate the participants of this exercise. If you do not use it, everybody will execute your derivation.
Exercise 4: Step-by-step Solution

Go to the customizing (MDGIMG -> Master Data Governance -> General Settings -> Data Quality and Search -> Define Validation and Derivation Rules).

Data Model: “MM”
The “Trigger Function” has been prepared for you already (and will be used by all participants). See appendix for a description how to create a trigger function. It is used to start the execution of derivations for all change requests that use the data model “MM”. Check that is there:
Create a Ruleset in the trigger function:

And insert a Rule:
Assign Condition (Use Value Range from Context -> More -> Material -> MatlType). And use “FGTR” (Drinks).

Change Condition -> Add more Conditions -> Change operator to “and”.

(1) Rule: Rule - 00 - Set Laboratory (Enabled Rule)
Use Direct Range from Context. Select “Type”. Select Change Request Type “Z##MAT01”. 

![Context Query](image)

<table>
<thead>
<tr>
<th>Where Used</th>
<th>State</th>
<th>Type</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Laboratory</td>
<td>Text</td>
<td>FADOM_MODEL_WIM</td>
<td></td>
</tr>
<tr>
<td>2. Meeting</td>
<td>Text</td>
<td>FADOM_MODEL_WIM</td>
<td></td>
</tr>
<tr>
<td>3. Meeting</td>
<td>Text</td>
<td>FADOM_MODEL_WIM</td>
<td></td>
</tr>
<tr>
<td>4. Meeting</td>
<td>Text</td>
<td>FADOM_MODEL_WIM</td>
<td></td>
</tr>
<tr>
<td>5. Meeting</td>
<td>Text</td>
<td>FADOM_MODEL_WIM</td>
<td></td>
</tr>
<tr>
<td>6. Meeting</td>
<td>Text</td>
<td>FADOM_MODEL_WIM</td>
<td></td>
</tr>
<tr>
<td>7. Meeting</td>
<td>Text</td>
<td>FADOM_MODEL_WIM</td>
<td></td>
</tr>
<tr>
<td>8. Meeting</td>
<td>Text</td>
<td>FADOM_MODEL_WIM</td>
<td></td>
</tr>
<tr>
<td>9. Meeting</td>
<td>Text</td>
<td>FADOM_MODEL_WIM</td>
<td></td>
</tr>
<tr>
<td>10. Type</td>
<td>Text</td>
<td>FADOM_MODEL_WIM</td>
<td></td>
</tr>
</tbody>
</table>
Hint: Make sure that you use **YOUR** change request type here! (Z##MAT01).

Then Add -> Assign Value to Context -> Laboratory

Add -> Perform Action -> Create -> Name "SET_LAB_##"
Specify the message:

You can also add you group number to the message to make sure that you get your own message. Save Rule and Activate if needed.
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Rules

Insert Rule □ Insert Exit Condition □

[ ] Disable Rule □ (1) Rule: Rule - 00 - Set Laboratory - Unlimited Validity

Valid From / To: \[00:00:00\] / \[00:00:00\]

Description: Rule - 00 - Set Laboratory

If

\[\text{MATERIAL-Matii Type} \text{ is equal to FGTR (Drinks)}\]

and

\[\text{Type} \text{ is equal to Z00MAT01}\]

Then

(1) Change value of \[\text{MATERIAL-Laboratory}\] to 002 (Laboratory 2)

(2) Perform \[\text{Set Laboratory}\]
Activate the Ruleset and dependent objects:

Activated:

Create a material and make sure that your derivation is called.
Exercise 4: Appendix – How to create a Trigger Function (has been prepared for the exercise)

Trigger Function -> Derivation -> Create Object Node. This function will be called from the Change Request if the data entity is “MATERIAL” (Naming needs to follow the rule “DERIVE_<Entity>”).
Interface (Signature) has been defined:

Material attributes are part of the interface
and the Change Request Type is part of the interface as well.

The function also has been activated (which has to be done for each BRF plus object).