

Active Governance of Master Data – An Introduction

Jennifer Hwang | Winshuttle



WINSHUTTLE
USER
GROUP CONFERENCE

Agenda

- About me
- Active Data Governance
- Using Winshuttle for Active Data Governance
- Examples and demonstrations



About me

Jennifer Hwang

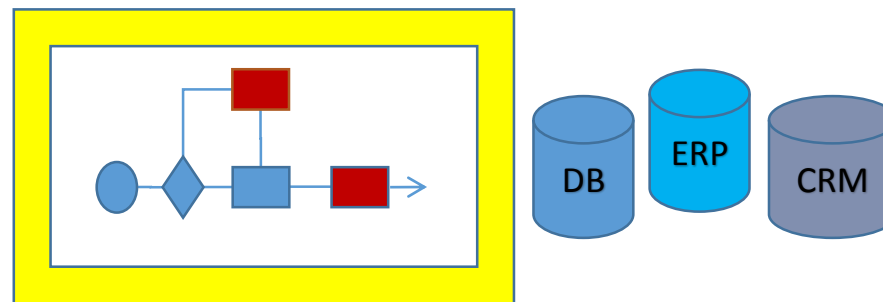
Solutions Engineer

- With Winshuttle since 2009
- Previously at SAP in Global Support
- Working with SAP since 2000
- BS / MS in Civil Engineering
- Philadelphia



What is Active Data Governance?

- Proactively monitoring the way data is collected, created, and modified prior to posting to SAP.
- Detecting and correcting issues before “bad” data ever gets to SAP.
- Eliminating errors due to omissions, duplicates, consistency and content errors, or a lack of standards.



Prevention is best!



Typical Master Data Issues - 1

Duplicates

- Multiple versions of the same object
 - Winshuttle Corp, Winshuttle LLC, Win Shuttle
 - Street, St., ST
 - 53, fifty-three, fifty three



Delays

- Affects critical business activities

Typical Master Data Issues - 2

Errors

- Wrong addresses, wrong contact person, wrong credit limits

Omissions

- Key fields missing that lead to issues downstream

Data Inconsistency

- Multiple systems have different data



Using Winshuttle For Data Governance

Live Validation against SAP

- Runs all business rules built into t-code

Duplicate Check

- Search through existing data

Address Validation

Data Validation

- Formatting of fields, dropdown lists, auto-populating fields

Role-based Views

- Have responsible group provide their own data



Live Validation against SAP

Enable validation in script

- If not possible, create validation-only script

DEMO

The screenshot shows a web browser window titled 'Winshuttle Complete Form' with the URL 'catlab.winshuttle.com/sedemos/_layouts/15/fill_out_form.sharevis.aspx?SVFormF'. The page content is as follows:

Line items					
Material Number	Quantity	Material Description	List Price	First Ship Date	Effective Price
RR1000	5	Wheel	1000	01/29/2016	5000

Below the table is a 'Total price' section with the following values:

Gross price	5000
Total discount	0
Final Price	5000

At the bottom is a 'Post to SAP' section with a 'Validate' button.



Duplicate Check against SAP

Use Query to search against existing records

- Use multiple Wild Cards
- Check multiple account groups

Fuzzy Logic?

DEMO

The screenshot shows a web browser window with the URL `catlab.winshuttle.com/SEdev/_layouts/15/fill_out_form.sharevis.aspx?SVForm`. The page has a yellow background and a blue header for each section.

Selection Criteria

Select *

Create New

Create with Reference

Search for Duplicates

Duplicate Search

Customer Name 1	Customer Name 2	Search Term	Country Key	Postal Code	Region
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Company Code	Customer Number	Customer Name 1	Customer Name 2	Account Group	Search Term	City	Region	Postal Code	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Search for Duplicates



Address Validation

Customer master account groups

- Especially Ship-To!

Using Web Services

- Address Doctor, Melissa Data, USPS, UPS, FedEx, Canada Post, Google Geolocation

Use Standards

- Set company standards!
 - All CAPS, USPS abbreviations, no periods

DEMO

- Address Validation – 3rd party
 - End-user
- Winshuttle Address control – Google Places
 - How-to



Data Validation – Formatting Rules

Type of field

Required field

Number of characters

Field pattern matching

Conditional field

DEMO

Number_10

Value must be Numeric



Data Validation – Cascading Dropdown Lists

Only show users the values they need to see based on what was previously selected

Put in a Field Pack to be reused in any form

DEMO

Company *	Business Unit *
Mill Creek Foods ▼	Beverage ▼
Country *	Location *
United States ▼	Biloxi ▼



Data Validation - Populating Fields

Based on what user selects, automatically populate other fields for them

DEMO



Workflows and Approvals

Views tailored for each role

DEMO

The image displays three overlapping screenshots of a web application interface for 'Material Creation Process'. Each screenshot features a yellow header with a 'NEW PRODUCT' badge and a 'Submitter' field containing 'Jennifer Hwang'. The first screenshot, titled 'Material Creation Process - Submit', includes 'Select Options' with radio buttons for 'Create Blank Form' and 'Create from Copy', and a 'Search Materials' checkbox. Below the header is a blue bar with a '+ Search' button. The second screenshot, titled 'Material Creation Process - MRP', shows 'Select Options' with 'Create from Copy' selected. Below the header is a blue bar with a '+ Retrieve Material Details' button. The third screenshot, titled 'Material Creation Process - Accounting', shows 'Select Options' with 'Create from Copy' selected. Below the header is a blue bar with a '+ Basic Data' button, followed by another blue bar with a '+ Accounting' button. The Accounting section includes a 'Valuation Class' dropdown menu set to '7920', and two input fields for 'Moving Average Price' (3.10) and 'Standard Price' (3.88). To the right of the Accounting section, there are three vertical input fields with '50' next to them.



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