

# **Trillium Add-on for SAP MDG**

## **Installation and Configuration Guide**

**Version 1.1**

**July 2017**

**TRILLIUM  
SOFTWARE™**

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***Trillium Add-on for SAP MDG  
Installation and Configuration Guide  
71117***

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# Preface

This document describes how to install and configure the Trillium Add-on for SAP MDG.

## Intended Audience

This document is intended for IT professionals who are responsible for installing and configuring the Trillium Add-on for SAP MDG. An SAP administrator and the documentation provided by SAP should be available during the configuration process.

## Related Documentation

In addition to this document, you may want to refer to the following documents:

- *TSS Installation Guide*
- *TS Connector for SAP Products Reference Guide*
- *TS Director User's Guide*

You may also want to visit the Trillium Web site at:

<http://www.trilliumsoftware.com>

The site contains a comprehensive resource library of white papers, case studies, product descriptions, solution summaries, webcasts, and related information.

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## CHAPTER 1

# Overview

This chapter describes the Trillium Add-on for SAP MDG. It highlights the functionality that will be enabled by installation of the add-on.

## About the Trillium Add-on for SAP MDG

The Trillium Add-on for SAP MDG enables Trillium address enrichment and duplicate checking in SAP MDG. The functionality is similar to Trillium's offerings in ERP and CRM for Customer, Vendor, and Business Partner master data maintenance.

Trillium is committed to supporting data quality integration in deployments of SAP MDG. This release launches our support for this functionality.

Trillium Add-on for SAP MDG offers the following:

- Address cleansing and enrichment, duplicate checking, and fuzzy search of world-wide name and address information for Customers (organizations), Suppliers (organizations), and Business Partners (organizations and individuals). Support is for real-time data processing, including review and acceptance of enrichment and duplicate checking.
- The user interface is available in English and German.
- Trillium Add-on for SAP MDG is available for SAP MDG 7.0 and 8.0.
- Trillium Add-on for SAP MDG will support all of the same countries that are currently supported by SAP ERP and SAP CRM. A sample project for the United States (US) is provided out-of-the-box and can be configured to support any additional country templates supported by Trillium.
- Purchase and installation of country-specific postal tables is required for the Trillium Add-on for SAP MDG to be able to process addresses from each country.

## CHAPTER 2

*Installing the Add-On*

This chapter describes installation of the Trillium Add-on for SAP MDG.

## Prerequisites

Before installing the Trillium Add-on for SAP MDG, ensure that the following software has been installed:

Software	Version	
TS Quality Connector for SAP	Release 15.2 or later	
ABAP Add-on "TRILLIUM"	Release 850 or later	
SAP MDG	Release 7.0, 8.0	
SAP MDG software components:	<u>7.0</u>	<u>8.0</u>
■ SAP_BASIS	7xx	740
■ MDG_APPL	618	619
■ MDG_FND	748	749
■ MDG_UX	618	619

## Installation

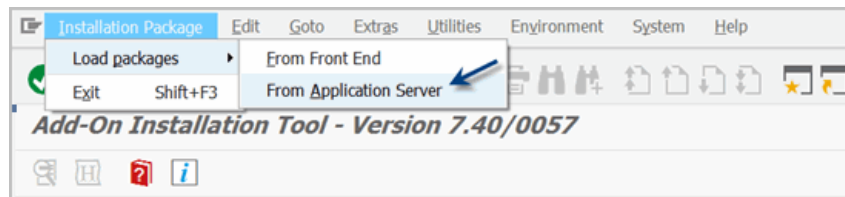
Trillium Add-on for SAP MDG is delivered as an ABAP add-on and is installed using transaction SAINT. All objects are delivered in namespace /TSSMDG/.

### ► To install the add-on

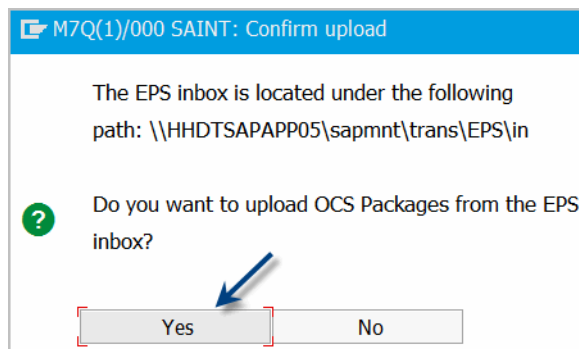
1. Locate the appropriate Add-on installation package SAP Archive (SAR) file on the installation CD:

Directory	File names	File description
MDG700_110	MDGEX110700.SAR MDGIN110700.SAR MDGUP110700.SAR	Upgrade from previous SAP application version Initial Add-On installation Upgrade to existing Add-On

- Copy the file onto your SAP server into the directory /usr/sap/trans.
- Log in to your SAP server at the operating system level as user <sid>adm.
- Unpack the archive using the following commands:  
For Linux: `cd /usr/sap/trans`  
For Windows: `cd <D>:\usr\sap\trans`  
`SAPCAR -xvf MDGIN110700.SAR`
- Log in to your SAP system in client 000 and run transaction SAINT to install the TSSMDG Add-on.
- In SAINT, load the Add-on package from the file system of the application server.



- Click **Yes** when prompted to upload OCS Packages.





A message similar to the following should be displayed:

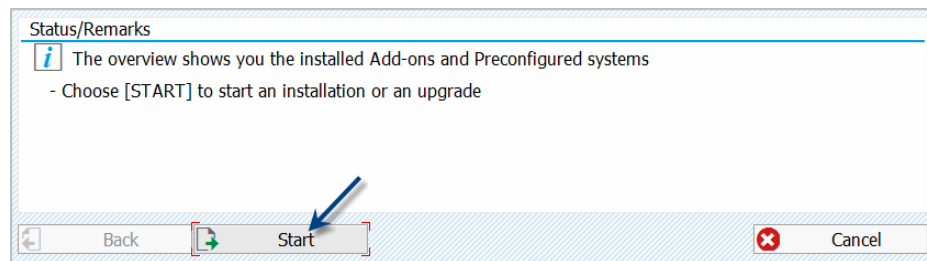
<b>SAINT: Uploading Packages from the File System</b>				
OCS File Name	Package	Result	RC	Message Text
E6D0020242722_0000052.PAT	SAPK-854COINTRILLIUM	OOO	0004	OCS file already exists in inbox. Upload not required.
E6D0020242722_0000055.PAT	SAPK-85401INTRILLIUM	OOO	0004	OCS file already exists in inbox. Upload not required.
M7D0020242722_0000004.PAT	SAPK-110COINTSSMDG	OOO	0004	OCS file already exists in inbox. Upload not required.

8. Click **Back**.
9. In the Add-On Installation Tool window, verify that Trillium ABAP Add-on release 850 or later is installed.

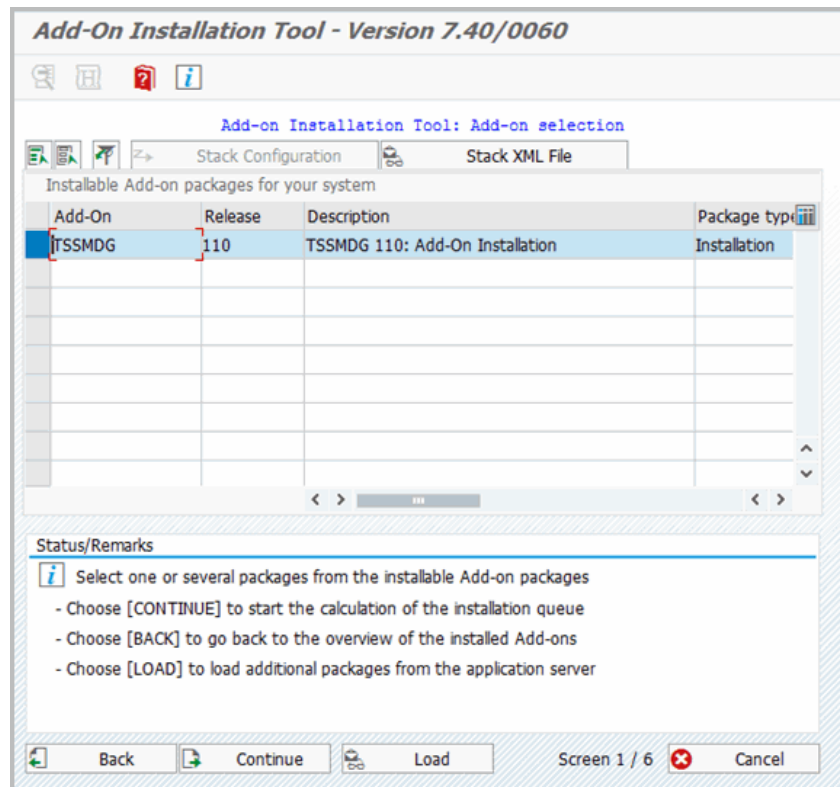
The screenshot shows the 'Add-On Installation Tool : Installed Add-ons' window. It has two tabs: 'Installed Components' (selected) and 'Deinstallable components'. Below the tabs is a table with the following data:

Add-on/PCS	Release	Level	Description	Import
SAP_UI	740	0015	User Interface Technology	
SEM-BW	600	0026	SEM-BW: Strategic Enterprise Management	
ST-PI	740	0003	SAP Solution Tools Plug-In	
TRILLIUM	854	0001	Trillium Connector 8.5 for SAP Basis 7.0	
UIMDG001	100	0003	UI for MDG	
WEBCUIF	747	0008	SAP Web UI Framework	

10. Click **Start** to begin the installation of the TSSMDG Add-on.



11. Select the Add-on TSSMDG and click **Continue**.



- At the time of this publication, there are no support packages for the TSSMDG Add-on. In the future, you can choose to include any available support packages on this screen. Click **Continue**.


**Add-On Installation Tool - Version 7.40/0060**

Installation of several Add-ons : Support Package selection

Installation queue    Support Package selection

Software Comp.	Target Support Package	Level	Calculated Package	Level
TSSMDG	<input type="text"/>	<input type="text"/>	SAPK-110COINISSMDG	0000
SAP_BASIS	<input type="text"/>	<input type="text"/>		
SAP_ABA	<input type="text"/>	<input type="text"/>		
SAP_GWFND	<input type="text"/>	<input type="text"/>		
SAP_UI	<input type="text"/>	<input type="text"/>		
PI_BASIS	<input type="text"/>	<input type="text"/>		
ST-PI	<input type="text"/>	<input type="text"/>		
SAP_BW	<input type="text"/>	<input type="text"/>		

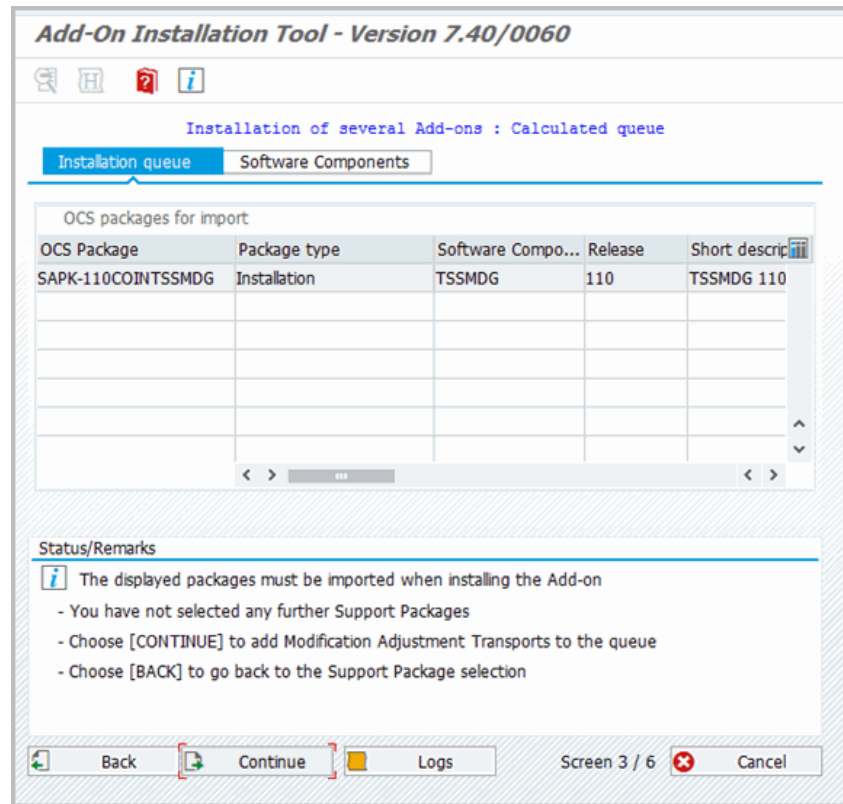
Status/Remarks

 You can extend the installation queue with further Support Packages

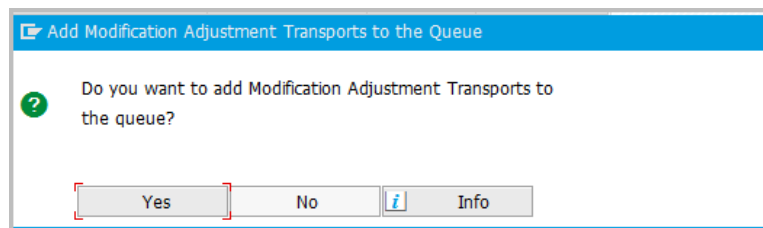
- Choose the required target Support Package for each component
- Choose [CONTINUE] to start the calculation of the extended installation queue
- Choose [BACK] to go back to the Add-on selection
- The tab page "Installation queue" displays the preliminary installation queue

   Screen 2 / 6

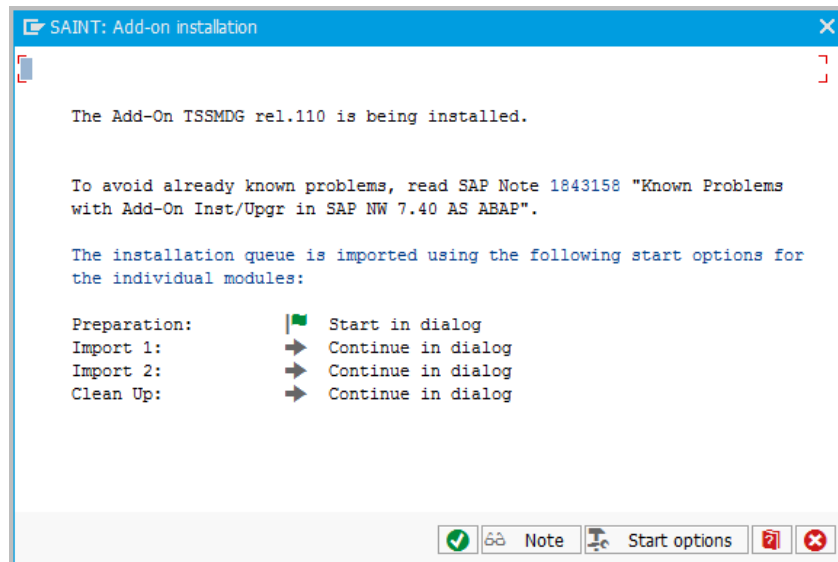
13. Review your selection and click **Continue**.



14. When prompted to add Modification Adjustment transports, click **No**.

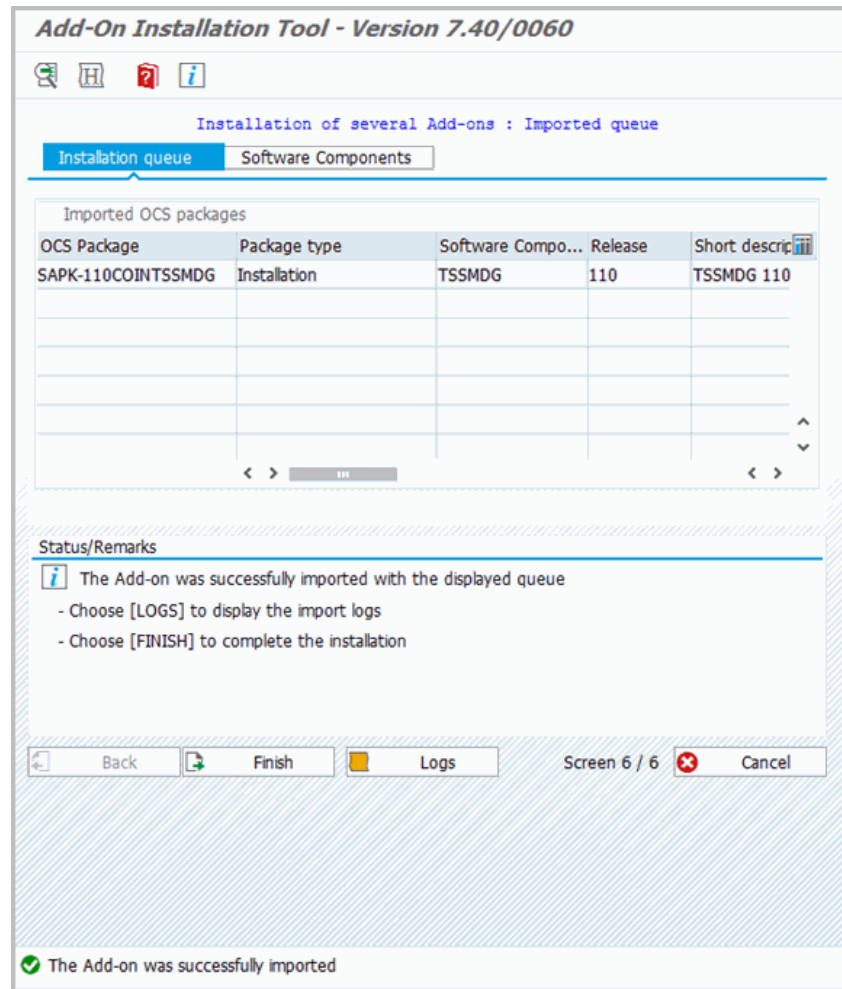


15. In the following screen, adjust the start options as desired and click to import.

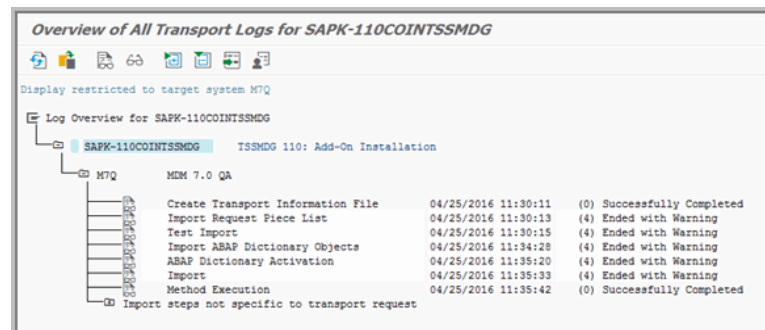


This step may take several minutes. The Status bar displays the progress of the import.

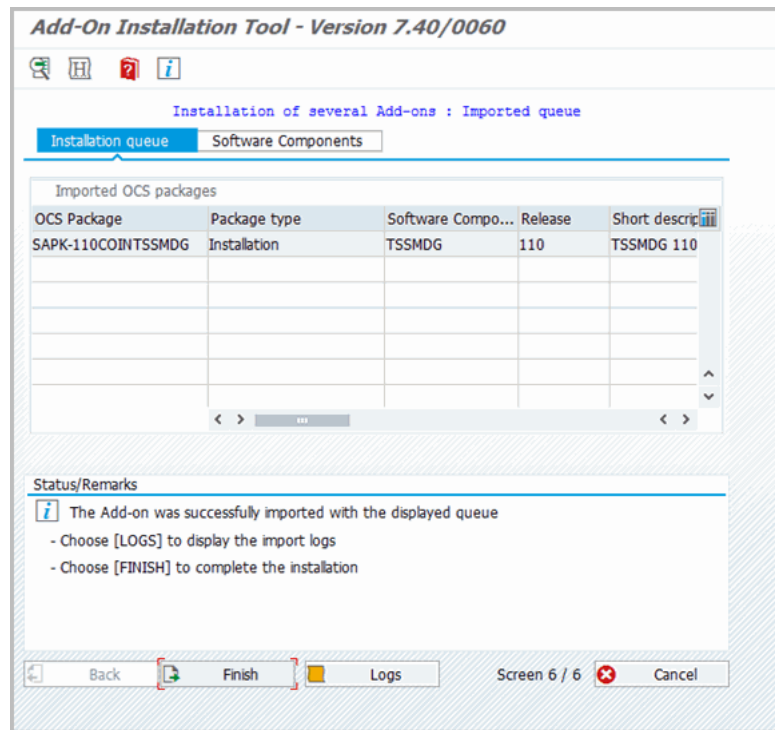
16. When the installation completes, click **Logs** to review the installation logs.



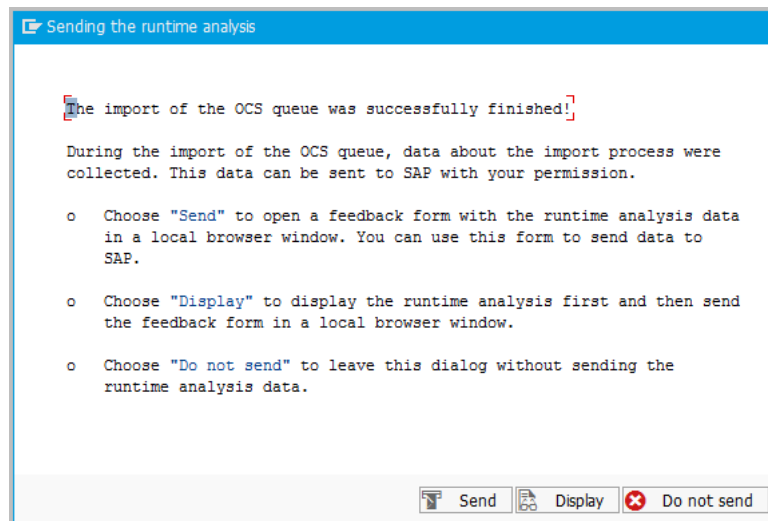
17. In the logs screen, all return codes should be 4 or less. Click **Back** to return to the previous screen.



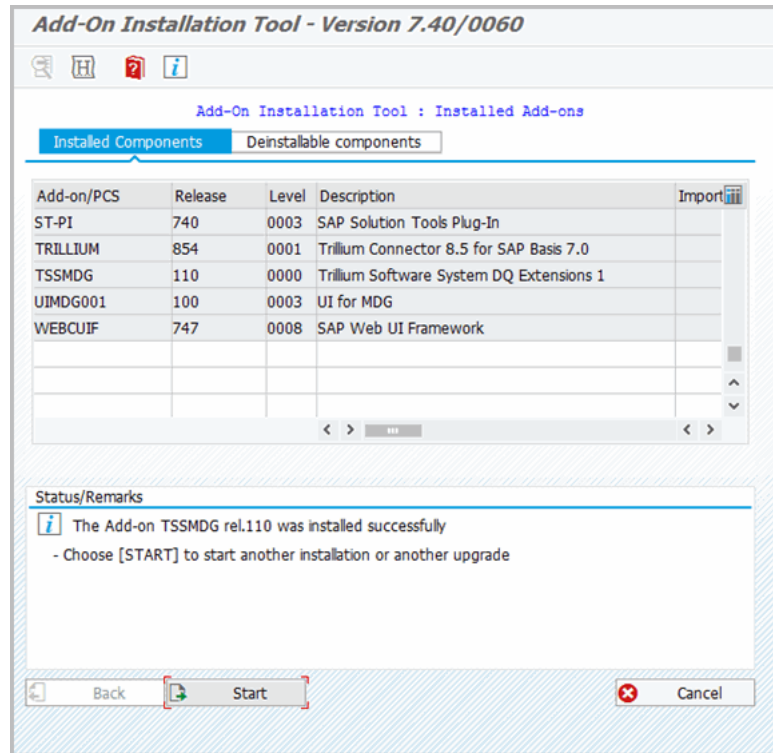
18. Click **Finish** to complete the Add-on installation.



19. On the following pop-up, click **Do not send**.



You should see the following messages:



20. Leave transaction SAINT and log off of client 000.

## Import Fuzzy Search View Customizing

The MDG Business Partner Fuzzy Search View Customizing is delivered in a transport request. To utilize the default list of fields on the fuzzy search view, import transport request M7DK900034.

The transport data file and control file are delivered in the same SAR file as the add-on installation or upgrade. The required transport files should already be in your transport directory. Manually add the transport to your import queue and import it into the SAP client that you will be using to run SAP MDG.

When importing the request in transaction STMS, be sure to use the import options Ignore Non-Permitted Transport Type and Ignore Invalid Component Version.

The transport contains ABAP Webdynpro Floor Plan Manager customizing for component FPM\_SEARCH\_UIBB with configuration ID BS\_BP\_DQUERY\_AD. It controls the fields that appear on the MDG Business Partner Fuzzy Search View. After importing the transport, when you use the "Address Search (Fuzzy)", the following criteria will be available in the search view by default.



### Search ERP Customer

Search Method:

Saved Searches:

**Search Criteria**

Name 1	<input type="text" value=""/>	is	<input type="text" value=""/>	<input type="text" value=""/>
Name 2	<input type="text" value=""/>	is	<input type="text" value=""/>	<input type="text" value=""/>
Street	<input type="text" value=""/>	is	<input type="text" value=""/>	<input type="text" value=""/>
Postal Code	<input type="text" value=""/>	is	<input type="text" value=""/>	<input type="text" value=""/>
City	<input type="text" value=""/>	is	<input type="text" value=""/>	<input type="text" value=""/>
Region	<input type="text" value=""/>	is	<input type="text" value=""/>	<input type="text" value=""/>
Country	<input type="text" value=""/>	is	<input type="text" value=""/>	<input type="text" value=""/>

Maximum Number of Results:

Save Search As:

## CHAPTER 3

# Configuring the Add-On

This chapter describes how to configure the Trillium Add-on for SAP MDG.

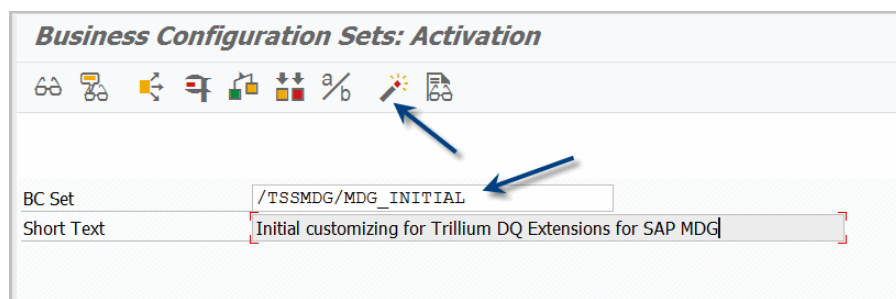
## Activate BC-SET to Install Initial Customizing Settings

Use transaction SCPR20 to activate BC-SET /TSSMDG/MDG\_INITIAL in the customizing client.

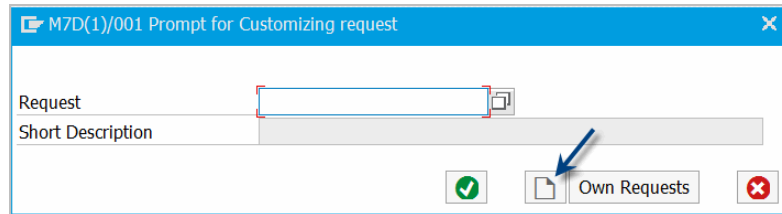
Use transaction SCPR20 to activate BC-SET /TSSMDG/MDG\_INITIAL in the customizing client.

### ► To activate BC-SET/TSSMDG/MDG\_INITIAL

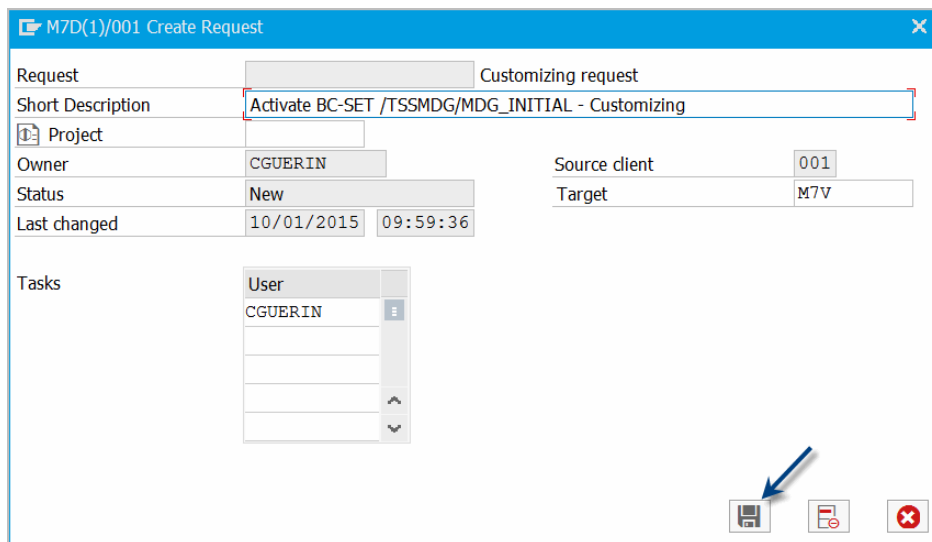
1. In the initial screen of transaction SCPR20, enter the BC-SET name /TSSMDG/MDG\_INITIAL and click **Activate**.



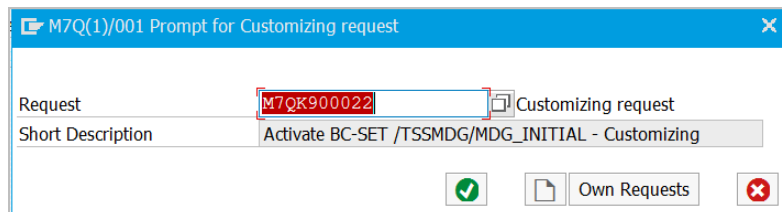
2. The system prompts you for a customizing request to hold the activated customizing settings. Click **Create** to create a new request.



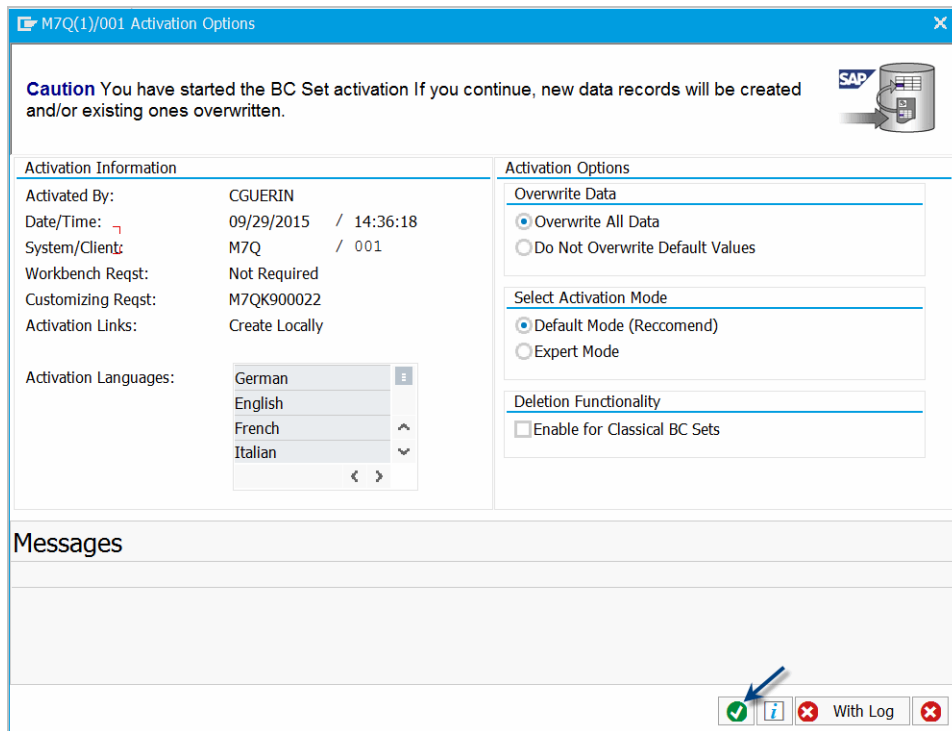
3. Enter a short description and click **Save** to create a request.



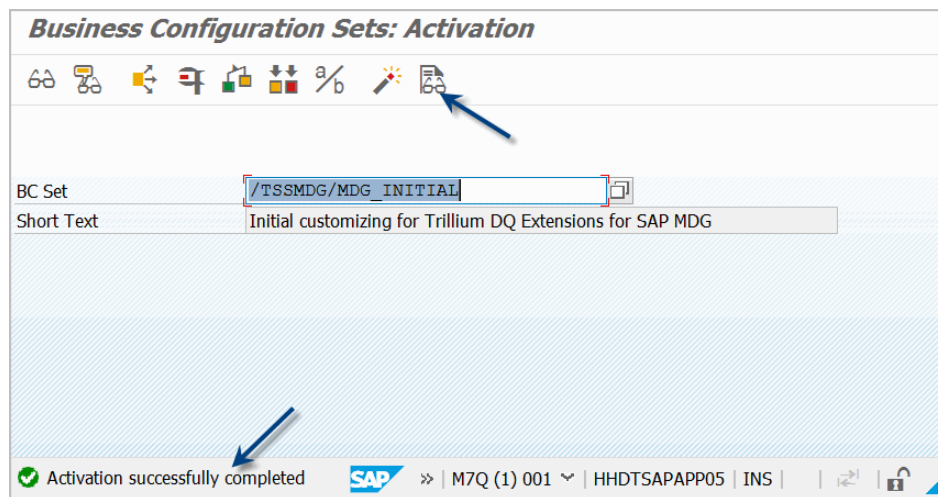
4. In the next popup, confirm the use of this newly created request by clicking **Enter**.



5. Use the default activation options and click **Enter** to continue the activation.



At the bottom of the screen, you should receive a message indicating that the BC-SET has been activated successfully.



6. Click **Activation Logs** to review the activation logs. All lights should be green.

**Business Configuration Sets: Activation Logs**

04/25/2016 um 13:24:37

- /TSSMDG/MDG\_INITIAL
  - V\_MDG\_SDQ\_MSG\_UI T
  - V\_USMD\_DPCHK\_MOD T

Activation Log    Activation Information

Maintain BC Sets    BC Set Overall View

Messages:

Type	BC Sets	Object	Message Text	Key Field	Info...
■			Main Activation Started		
■	/TSSMDG/MDG_INI...		BC Set /TSSMDG/MDG_INITIAL passed to activate		
■	/TSSMDG/MDG_INI...	V_MD...	Customizing object V_MDG_SDQ_MSG_UI passed to activation		
■	/TSSMDG/MDG_INI...	V_US...	Customizing object V_USMD_DPCHK_MOD passed to activation		
■			Main Activation Ended		
■			Reactivation started		
■			Reactivation ended		
■	/TSSMDG/MDG_INI...	V_MD...	Activation of customizing object V_MDG_SDQ_MSG_UI successful		
■	/TSSMDG/MDG_INI...	V_US...	Activation of customizing object V_USMD_DPCHK_MOD successful		
■	/TSSMDG/MDG_INI...		Activation of BC Set /TSSMDG/MDG_INITIAL ended successfully		
■			Activation successfully completed		

7. Leave transaction SCPR20.

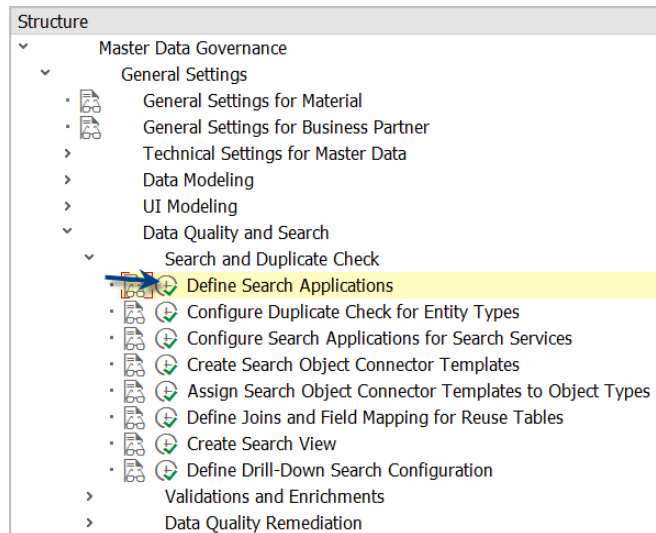
## Manual Customizing Settings

To use the Trillium Add-on for SAP MDG, you must make some manual customizing settings in the MDG Implementation Guide.

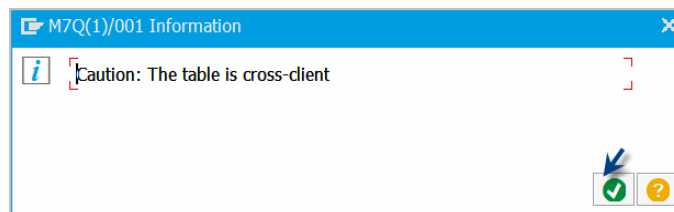
For fuzzy search with Trillium, you need to update match profile **MATCH\_BP\_ADDRESS** and remove the **Mandatory** flag from all fields.

### ► To adjust required fields in match profile for fuzzy search

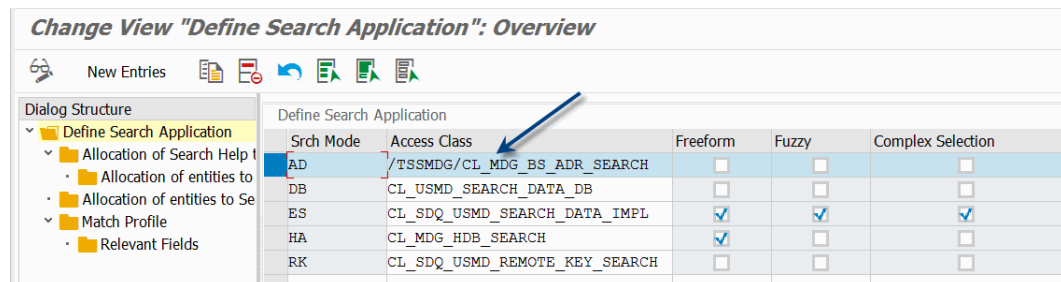
1. Go to the MDG Implementation Guide by running transaction MDGIMG.
2. Under **Master Data Governance > General Settings > Data Quality and Search > Search and Duplicate Check**, execute **Define Search Applications**.



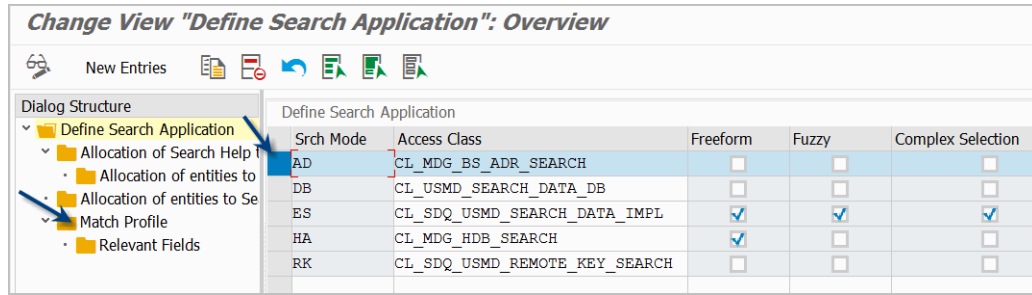
3. Confirm the cross-client warning popup.



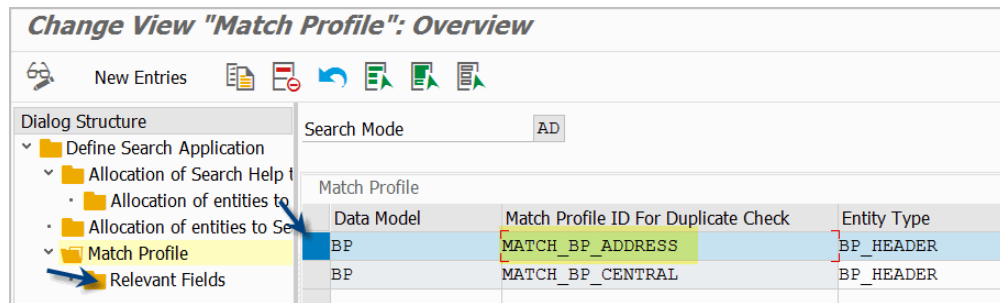
4. Select Search Mode **AD**. Change the **Access Class** name to **/TSSMDG/CL\_MDG\_BS\_ADR\_SEARCH**.



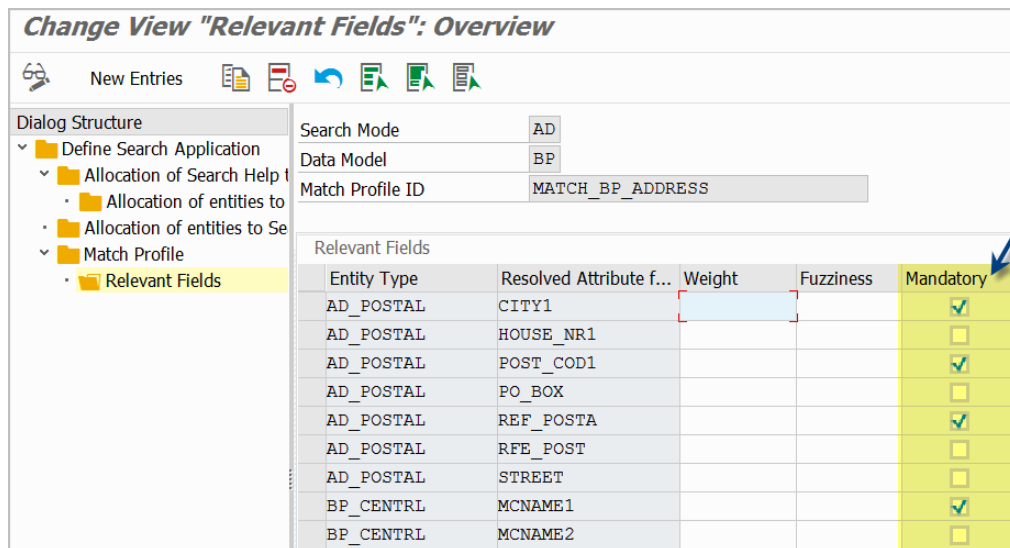
5. Select Search Mode **AD** and then double click **Match Profile** in the tree on the left side of the window.



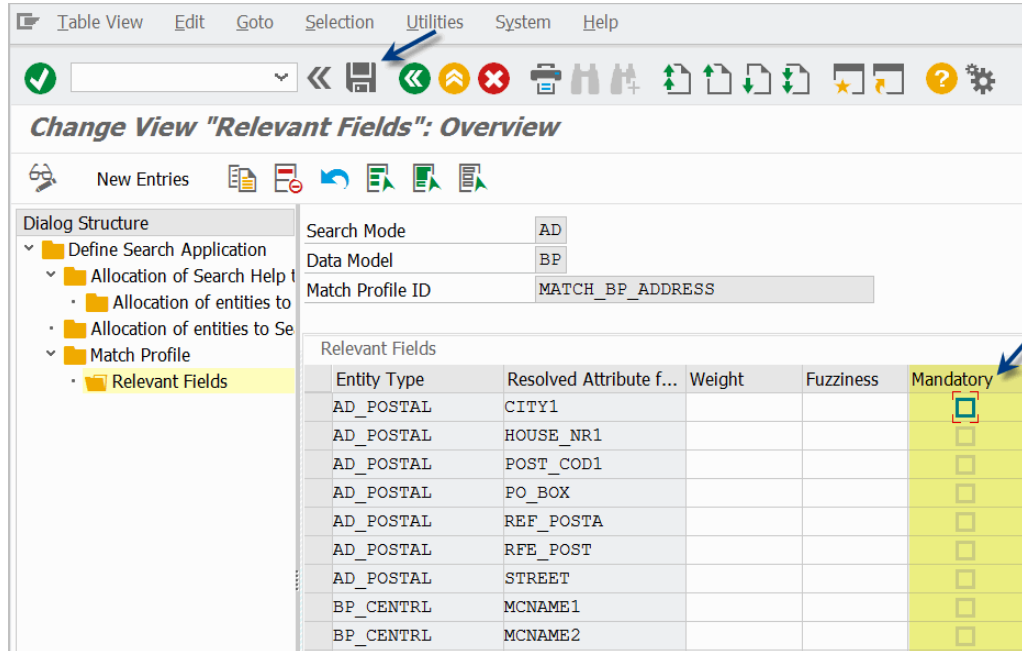
6. Select the line for Data Model **BP** and Match Profile ID **MATCH\_BP\_ADDRESS**. Then double click **Relevant Fields** in the tree on the left side of the window.



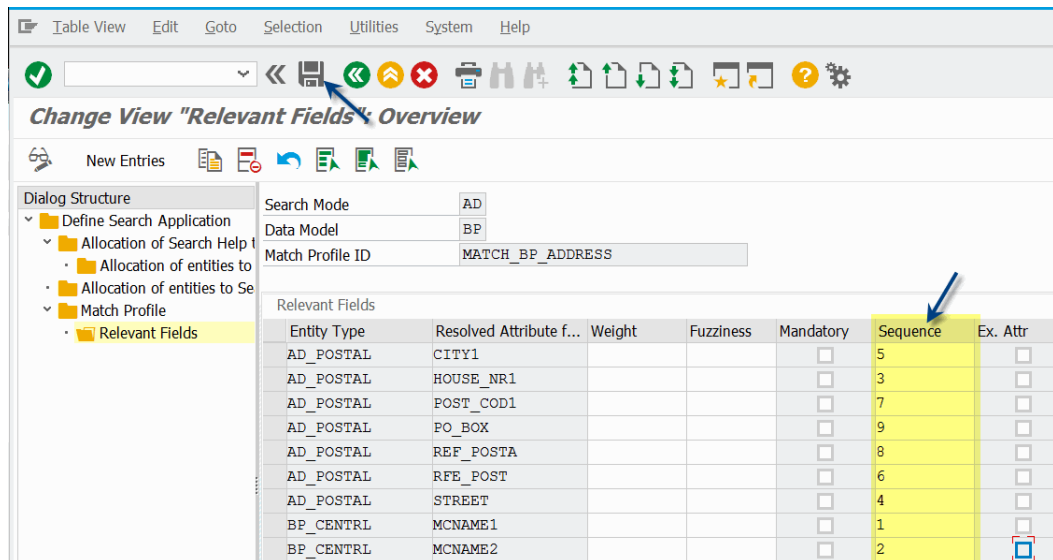
7. You will notice that the **Mandatory** check box is selected for some of the address fields.



- De-select the **Mandatory** check box for all of the fields in the list. This will ensure that none of the fields are mandatory for the fuzzy search.

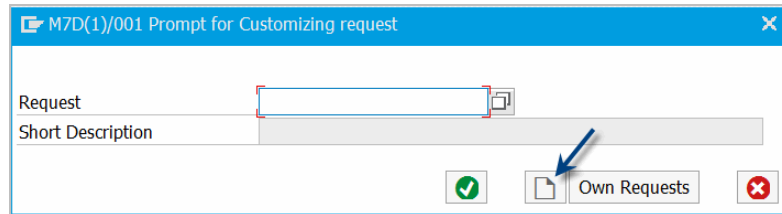


- In the **Sequence** column, enter sequence numbers that match the column order to be used when the fields are displayed in the duplicate check pop-up window. The sequence numbers shown below are a good starting point. Click **Save**.

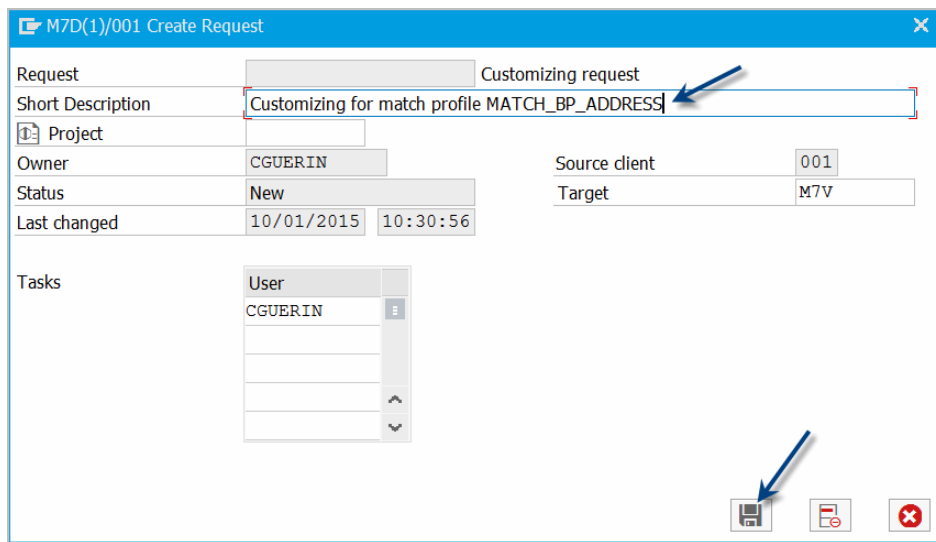


- The system prompts you for a customizing request to hold the customizing settings. Click Create to create a new request.

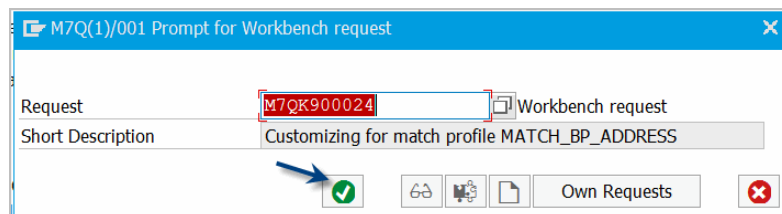




11. Enter a short description and click Save to create a request.



12. In the next popup, confirm the use of this newly created request by clicking **Enter**.



13. Leave transaction MDGIMG.

## CHAPTER 4

# *Using the Add-On*

This chapter describes how to use the Trillium Add-on for SAP MDG. It describes the postal validation, duplicate check, and fuzzy search processes that are enabled in SAP MDG.

## Postal Validation and Duplicate Check

Postal validation performs the check for postal errors and enriches the address data in accordance with postal guidelines. This process takes the data entered in an SAP MDG change request and passes it to the TS Connector, where it is converted, routed, parsed, geocoded, and reconstructed (if required). Then window keys are created, to be used as indexed search fields for duplicate checking and for the fuzzy search process. When the data has been successfully validated, the enriched data is returned to SAP MDG for review prior to saving into the SAP MDG change request. If the data is not successfully validated, a descriptive error message is displayed in a popup window. After the postal validation is complete, the duplicate check is invoked. If any duplicates are found, they are also displayed in a popup window.

In SAP MDG change requests for Business Partners, ERP Customers, and ERP Vendors, there is an assignment block for entering address data:

Organization: \$105, (no description available)

Save Submit Check Undo Redo

Change Request Edit

General Notes Attachments

**General Data**

Change Request ID: 146

Description: Create new customer

Priority: [v]

Due Date: [T]

Reason: [v]

**Process Data**

Status: Changes to Be Executed

Current Workitem: New Change Request

Created On/By: 10/02/2015 10:13:07 Chaz Guerin

**ERP Customer Details** Edit

**Administrative Data**

Customer: [ ]

Account Group: Customer (general) [v]

BP Type: [ ]

BP category: 2

**General Data**

Title: [v]

Name 1: Trillium Software

Name 2: [ ]

Search Terms: [ ]

**Address**

Street / House Number: 300 concord rd

Postal Code / City: 01821 billerica

Country: us [ ]

Region: [ ]

Language: en [ ]

Transportation Zone: [ ]

PO Box Postal Code / PO Box: [ ]

PO Box Without Number: [ ]

Company Postal Code: [ ]

After entering the address data and clicking enter or clicking **Check**, the entered address data is passed to Trillium via SAP Business Address Services and the TS Connector for SAP. After the data has been validated and enriched, it is returned to SAP MDG along with any appropriate messages. Upon return from Trillium, the address data and any messages are displayed in a popup window in SAP MDG:

**Trillium Address Enrichment** [ ] [X]

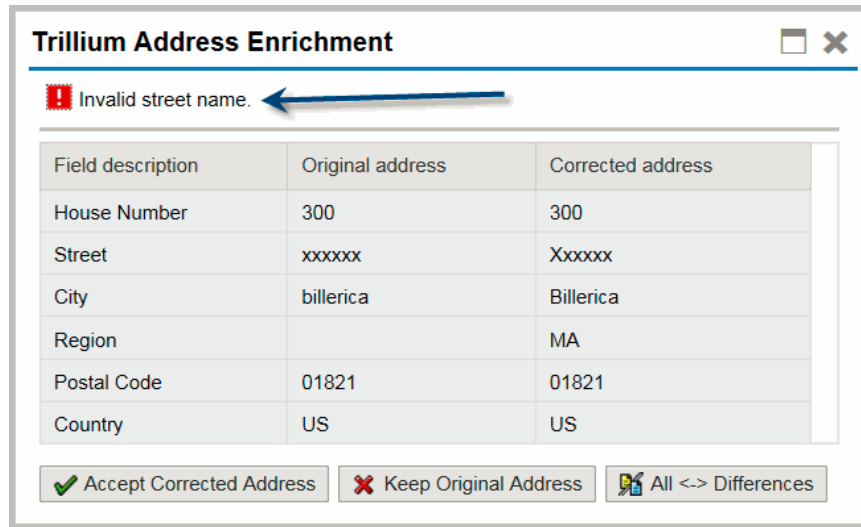
✔ Address was successfully checked.

Field description	Original address	Corrected address
House Number		300
Street	300 concord rd	Concord Rd
City	billerica	Billerica
Region		MA
Postal Code	01821	01821-6612
Country	US	US

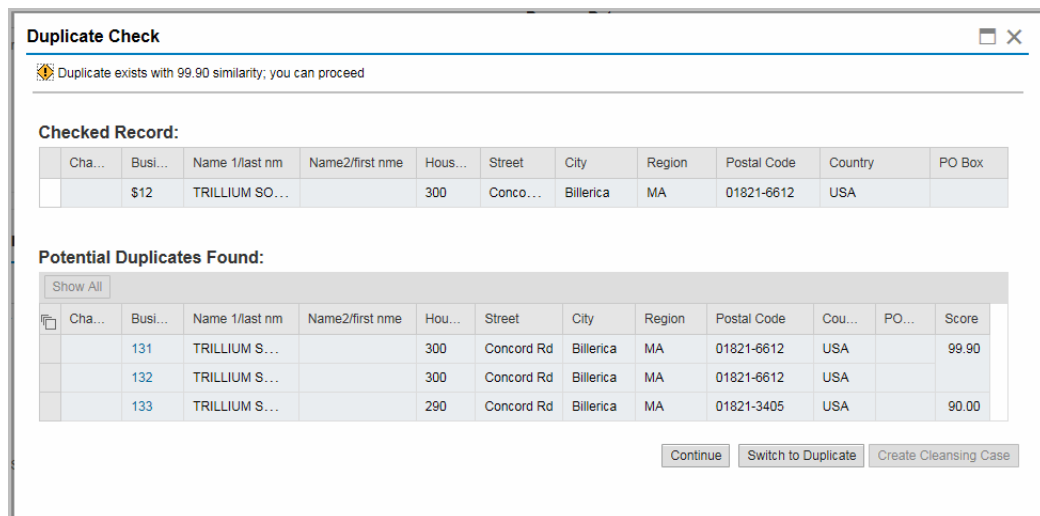
Accept Corrected Address
  Keep Original Address
  All <-> Differences

This window displays the originally entered address as well as the corrected address and allows the user to choose which version of the address they would like to use. Any messages are displayed above the address data. You can also choose to view only the fields that have been changed by clicking **All <-> Differences**.

If there is an inconsistency with the entered address data, an error message is displayed above the address data:



After choosing the corrected address or the originally entered address, the selected address data is passed to the duplicate check. Trillium then checks for the existence of any duplicates. If any duplicates are found, they are displayed in a popup window:



The user has the option of ignoring the potential duplicates by clicking **Continue**. If the user believes that one of the entries is a duplicate, they can select that business partner and click **Switch to Duplicate**. The data that was entered up to this point is discarded and the existing business partner is displayed.

If no duplicates are found or the user clicks continue on the duplicate check popup, the selected address data is updated to the SAP MDG change request, as shown in the following figure:

Address	
House Number / Street:	300 Concord Rd
City / State:	Billerica MA Massachusetts
ZIP Code:	01821-6612
* Country:	US USA
District:	
* Language:	EN English
Tax Jurisdiction:	
Transportation Zone:	
PO Box Postal Code / PO Box:	
PO Box Without Number:	<input type="checkbox"/>
Company Postal Code:	

## Fuzzy Search

The fuzzy search function enables you to search for an organization or person using a partial name and address. However, unlike other SAP standard search options, it performs postal validation and creates window keys from the entered search criteria. Therefore, the search can retrieve records with the same window keys and perform the reference matching process in TS Quality. This is generally the same process as duplicate check. The difference is in the matcher business rules, which are not as tightly defined to accommodate the partially entered name and address.

To perform the fuzzy search in SAP MDG, navigate to one of the Business Partner, ERP Customer, or ERP Vendor search views. For example, you can navigate from the MDG for Customer home page to the ERP Customer search view:

**Customer Governance (ERP Customer UI)**

ERP Customer Processing ⚙️

[Search ERP Customer](#) ←

Processing of Multiple Customers ⚙️

[Create Mass Change Requests](#)  
[Mass Change](#)  
[File Download](#)  
[File Upload](#)  
[Create Hierarchy Change Requests](#)  
[Hierarchy Processing](#)

Change Requests and Documents ⚙️

My Change Requests

Status

- Approved ( 27 )
- Rejected ( 0 )
- Error ( 0 )
- Draft ( 0 )
- In Process ( 16 )

On the search view, you need to select the **Address Search (Fuzzy)** option in the **Search Method** drop-down box. Then enter your search criteria and click search. The Trillium fuzzy search results appear in the lower portion of the search view, after the Search Criteria section:

The screenshot shows the 'Search ERP Customer' interface. At the top, the 'Search Method' is set to 'Address Search (Fuzzy)'. Below this, there are fields for 'Name 1', 'Name 2', 'Street', 'Postal Code', 'City', 'Region', and 'Country', each with a dropdown menu for the search operator (all set to 'is') and a text input field. The 'Street' field contains '300 concrd', the 'City' field contains '01821', and the 'Country' field contains 'US'. There are also buttons for 'Search', 'Clear Entries', and 'Reset to Default'. A 'Maximum Number of Results' checkbox is checked and set to 100. Below the search criteria, there is a 'Result List: 14 business partners found' section with a table of results.

P..	Busin...	Description
	122	Trillium Software New 7 / 300 Concord Rd / Billeri
	123	Trillium Software New / 300 Concord Rd / Billerica
	124	Trillium Vendor / 300 Concord Rd / Billerica MA 01
	125	Trillium Vendor / 300 Concord Rd / Billerica MA 01

Note that the search criteria used in this example are entered with the following errors, but the results are still found.

- House number and street name are both entered in the street name field
- The street name is spelled incorrectly
- The postal code is entered in the city name field

For additional information on configuring and using Trillium postal validation, duplicate checking, and fuzzy search, see the *TS Connector for SAP Products Reference Guide*.

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