

Master Data Management: Create Customer Data



Applies to:

SAP enhancement package 1 for SAP NetWeaver Composition Environment 7.1 including SAP NetWeaver Business Process Management and SAP NetWeaver Business Rules Management.

Summary

This document describes the process of creating master data for a customer. It is a self-service process which enables customers to request the creation of their master data themselves. It demonstrates a perfect integration of SAP NetWeaver Master Data Management and SAP NetWeaver BPM based on SOA-enabled services and principles.

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Created on: 18 December 2008

Authors Bio



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Process Purpose

Whenever companies establish new relationships with customers, it is of great importance for them that the customers become part of their business network as well. This strengthens the confidence between partners and helps in the day-to-day business between the two. Customers gain access to the latest information of the company (for example, strategic announcements, software releases, roadmaps) which results in a more trusting relationship and builds the fundamentals of a cooperative, respectful, and successful business.

In essence, a strong customer relationship is of paramount importance in times of very strong competitive markets.

Therefore, customers should be able to register themselves easily and comfortably with the company's corporate portal: It is the starting point for a strong relationship with customers as it simplifies the way customers can become part of a company's business network

Business Process Overview

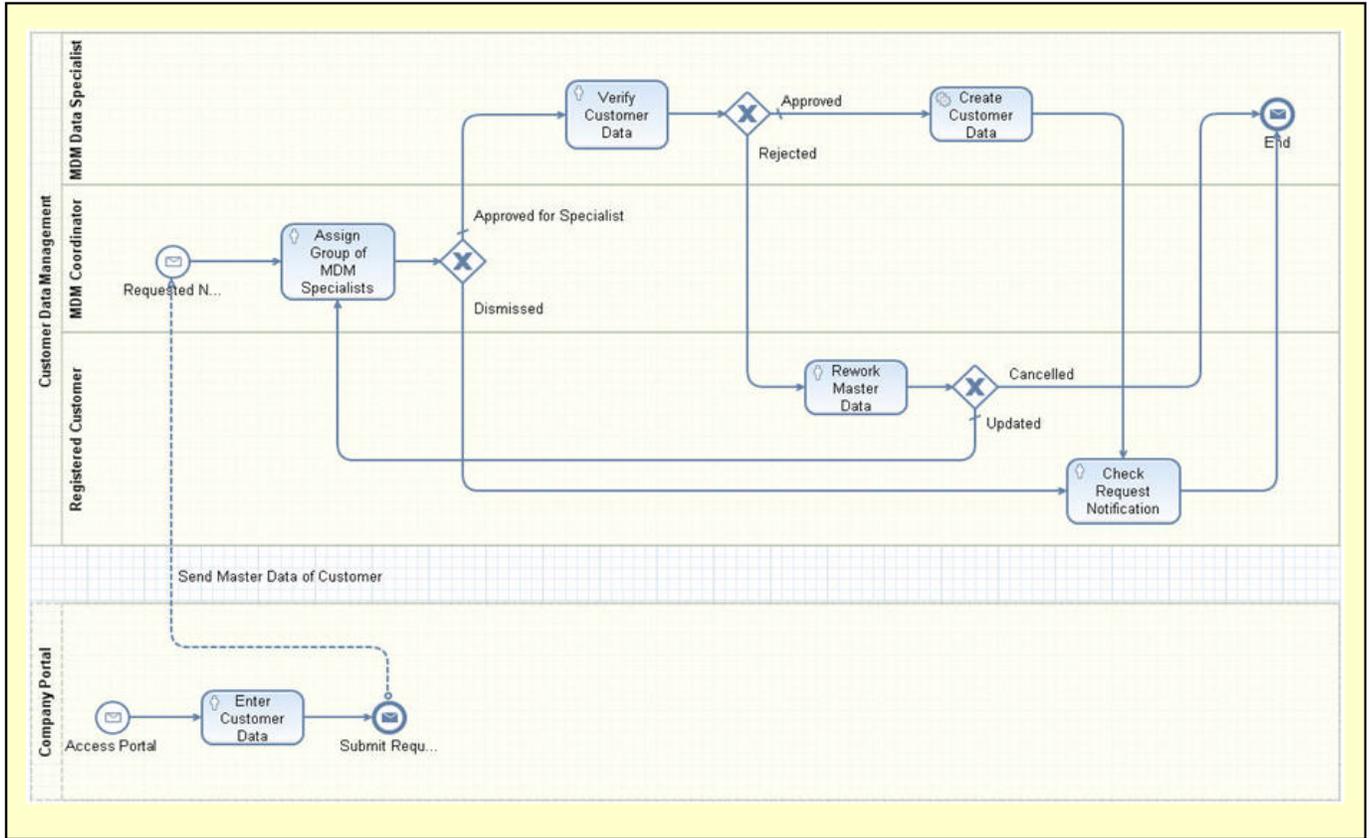
The process "Create Master Data of Customer" follows a typical "Request/Approval" process pattern and is kicked-off by a customer who wants to gain access to the company's corporate portal. For this the customer has to fill out a form providing basic contact information. The customer can access the form with a guest account on the corporate portal; submitting the form kicks-off the process. The data is handed over to the coordinator of Master Data Management. It is the coordinator's task to check whether the data already exists or not. In case of a duplicate, the coordinator will dismiss the request and inform the customer. Otherwise, the coordinator assigns an appropriate group of specialists to the request. The decision that belongs to this group is based on the customer's data. One specialist picks the task and either approves or rejects the request. In case of approval, the master data for the customer is created within the Master Data Management system and the customer is notified. In case of rejection, the customer can either cancel or rework his request. In the latter, the process will continue with the coordinator of Master Data Management as described above.

This document includes the process diagram. For more information on how to create a process model with SAP NetWeaver Business Process Management, see Modeling Processes with Process Composer and Modeling Rules with Rules Composer in the SAP NetWeaver Composition Environment Library.

To make such a process executable, you need to define the business logic: Import and assign service interface definitions, create and assign tasks, create and integrate a Web Dynpro UI, and import and assign data types. Making this particular process workable will be explained in another document that will be published soon.

Process Model

This figure shows the process diagram modeled with the process composer, which is the design time of SAP NetWeaver Business Process Management.



Process Steps

This chapter gives a short description of each process step. Process steps are, for example, events, human and automated activities, or gateways.

Pool: Company Portal

This pool is for documentation purposes only and shows how the actual process “Create Master Data of Customer” is initiated.

Access Portal (Start Event)

The customer logs on to the corporate portal of the company that is externally accessible and uses a guest account for access.

Enter Customer Data (Human Activity)

The customer opens a request for a new account and fills out all the information required.

Submit Request (End Event)

The customer submits the data and initiates the process “Create Master Data of Customer”. To track the request, the customer gets an intermediate identifier that allows him to log on to the corporate portal and access his human interaction center.

Pool: Customer Data Management

This pool represents the executable process: It comprises all the steps necessary to create the customer's master data in the SAP NetWeaver Master Data Management.

Requested New Customer (Start Event)

The process starts with the data of a new customer that was entered in the previous phase.

Assign Group of MDM Specialists (Human Activity)

The customer request is forwarded to the MDM coordinator who checks whether the customer already exists in SAP NetWeaver Master Data Management. If the customer is already registered, the MDM coordinator dismisses the request. Otherwise the MDM coordinator decides which group of MDM specialists will process the customer request. The decision is based on the customer data entered.

Does the Customer Already Exist? (Exclusive-Choice Gateway)

Based on the decision of the MDM coordinator, the process flow continues with either a group of MDM specialists who will process the customer request or with the customer who will be notified that the master data already exists.

The default choice for this gateway is to forward the task to the MDM specialists.

Verify Customer Data (Human Activity)

One of the MDM expert group specialists picks the customer request and checks that the master data entered is complete. If all required fields have been filled out correctly, the MDM specialist approves the customer request. Otherwise the specialist rejects the customer request and adds comments about missing or incorrect data

Was the Customer Request Approved? (Exclusive-Choice Gateway)

Based on the MDM expert's decision, the process continues with either the creation of the master data (MDM expert approved the request) or with the reworking of the request by the customer (MDM expert rejected the request).

The default choice for this gateway is to create the master data.

Create Customer Data (Automated Activity)

After the customer's request has been approved by the MDM specialist it is created in SAP NetWeaver Master Data Management. Therefore to create the master data, this activity invokes an SOA-enabled service that is provided by SAP NetWeaver Master Data Management.

Precondition: The MDM specialist needs appropriate access rights to create the customer's master record in SAP NetWeaver Master Data Management.

Check Request Notification (Human Activity)

The customer receives a notification if the master data has been created successfully or if it has failed. The customer therefore gets information about either why the request was dismissed or the created master data and the user account.

Rework Master Data (Human Activity)

In case a MDM specialist has rejected the request, the customer is able to either update the data entered or decide to close the request. This is up to the customer as the reason for his request might have changed in the meantime.

Has the Customer Updated the Request? (Exclusive-Choice Gateway)

Based on the customer's decision, the process either goes straight to the end or continues with the updated master data about the customer. In the latter case the process flow continues with the "Assign Group of MDM specialists" human activity.

The default choice for this gateway is to continue with the MDM coordinator's task to assign the specialists to the request.

Process Roles

The following table lists the process roles, the human activities they are involved in.

Process Role	Human Activities/Tasks	Potential Owners	Comment
Registered Customer	<ul style="list-style-type: none"> • Rework Master Data • Check Request Notification 	Any customer who has access to the corporate portal of the company	
MDM coordinator	<ul style="list-style-type: none"> • Assign Group of MDM Specialists 	Any person who has deep knowledge in handling master data of different business entities. Furthermore, this role needs to be able to distinguish the different attributes of one business entity (identify the critical attributes)	
MDM data specialist	<ul style="list-style-type: none"> • Verify Customer Data 	Every person who has got detailed knowledge about the master data that is required for a particular business entity	This person might have the "MDM coordinator" process role as well

Automated Activities

The following table lists the automated activities and the systems where the activity is performed.

System	Automated Activity	Web Service Provider
SAP NetWeaver MDM	Create Customer Data	SAP NetWeaver MDM Web Service

Related Content

Links to Other Documents in SDN

[SAP NetWeaver Business Process Management – End-to-End Process Implementation Sample](#)

[Introducing SAP NetWeaver Business Process Management \(BPM\)](#)

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