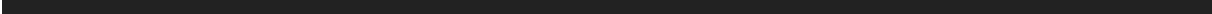


SAP NetWeaver Master Data Management 7.1  
Document Version: 2.0 – December 2016

# MDM Checklists

## Project Preparation and Business Blueprint





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# Document History

Before starting the installation, make sure you have the latest version of the *MDM 7.1 Checklists* by checking on the SAP Help Portal at [help.sap.com/nwmdm71](http://help.sap.com/nwmdm71).

Table 1:

Version / Date	Important Changes
2.0 / December 2014	<ul style="list-style-type: none"><li>• Minor updates to MDM 7.1 Business Blueprint Checklist section</li><li>• Format of the document has been updated</li></ul>
1.21 / May 2013	<ul style="list-style-type: none"><li>• Revised and updated links to more information</li><li>• Added Configuration Assistant tool to Supportability Setup</li></ul>
1.2 / April 2013	<ul style="list-style-type: none"><li>• Updated for MDM 7.1 SP10</li><li>• Additions made to sections 3.3 and 3.5</li></ul>
1.1	As of MDM 7.1 SP08 if the text length is longer than 500 characters, use Large Text fields.
1.0	First official release of this document

# 1 Introduction

The purpose of this document is to provide SAP NetWeaver Master Data Management 7.1 (MDM 7.1) customers with a solid foundation for executing an optimal and effective MDM implementation. The objective is to ensure the future successful operation of MDM-based scenarios.

The document consists of two checklists that highlight the most critical product related considerations and actions required during the following two implementation phases:

- **Project Preparation**  
This phase focuses on the planning and preparation of the implementation by defining project goals and objectives, the scope of implementation, implementation strategy, the project schedule, and the implementation sequence. The project team is set up during this phase.
- **Business Blueprint**  
The purpose of this phase is to create the Business Blueprint document, which is a detailed description of business processes and objectives identified during the requirements-gathering workshops. During the Business Blueprint phase, the scope of the project is defined, the original goals and objectives are refined, and the project schedule is finalized.

It is essential that the MDM implementation owner and the project team reference these checklists and carry out all tasks described prior to the installation process and throughout the implementation phases. Working through these checklists allows potential project implementation problems to be identified and solved, increasing the chances of achieving the desired long term goals.

The checklists are not intended to replace MDM documentation and do not give a full explanation of each task. This information is already published in various forms of documentation; reference guides, SAP Notes, How-to Guides, and so on. Links to the various sources of documentation have been provided and will assist you in quickly referencing the relative document and completing the tasks.

## Target Audience

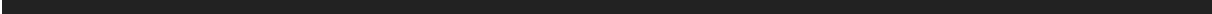
MDM project implementation owners

## How to Use the Checklists

### ➔ Recommendation

The project team should have the checklists with them during the entire course of the implementation. We recommend that the checklists be used in the early stages of the project planning to avoid having to make major changes in the later part of the implementation phases.

We highly recommend that all tasks relevant to the landscape and scenario be completed. Failure to do so will most likely result in an unsuccessful implementation – some issues may not be apparent until you actually begin working with real data.



We suggest using the checklists as follows:

- Use the PDF version of the document to enable quick linking to relevant documents for additional information. The links in the checklists are direct links. You can also access the documents as follows:
  - SAP Notes: [service.sap.com/notes](https://service.sap.com/notes)
  - MDM 7.1 Documentation Center Page: [help.sap.com/nwmdm71](https://help.sap.com/nwmdm71)
  - SAP Developer Network (SDN): [sdn.sap.com](https://sdn.sap.com)
- Print a copy of this document. As you implement the project, we recommend that you mark the status of each checklist item, for example:

Table 2:

Tasks completed successfully	V
Unable to complete task	X
Task not applicable	-

- If you have comments, enter them in the area provided next to each checklist item.

## 2 MDM 7.1 Project Preparation Checklist

This section provides checklists for preparing your MDM project.

### 2.1 Project Planning

#### **i** Note

MDM is highly flexible and configurable. Therefore comprehensive project planning can have a profound effect on the success of an MDM project.











To avoid discovering missing functionality at the last minute, it is important that you conduct early trials of the available functionality and check if functional and performance business requirements of the project are met. Prior to conducting these trials, it is important to define and document expected data volumes and performance KPIs to ensure that the implementation meets these requirements.

Table 3:

Status	Task	More Information	Customer Comments
	As early as possible in the business blueprint phase, allocate time for validating that the required functionality exists.		
	Define and document expected data volumes and performance KPIs.		
	Plan for a load and performance test as early as possible in your project.		
	Verify SAP's release plan for the next MDM support packages (SPs) and patches.  By taking this into consideration as part of the project plan, you can minimize the number and scope of upgrades required during project implementation and after Go Live (in case high priority product issues are encountered).	SAP Note <a href="#">1481741</a>	
	Plan for a SAP Go Live check.	SAP Note <a href="#">1251022</a>	

## 2.2 Landscape Considerations

Table 4:

Status	Task	More Information	Customer Comments
	Select platforms according to the MDM Product Availability Matrix.	<a href="#">Product Availability Matrix</a> 	
	If you intend to use SAP Standard Business Content, select hardware based on the <i>MDM Sizing Guide</i> .	<a href="#">MDM 7.1 Sizing Guide</a> 	
	If you intend to use modified standard business content or custom business content: <ul style="list-style-type: none"> <li>• Select the hardware only after the business blueprint phase.</li> <li>• Select the hardware based on sizing service results.</li> <li>• Verify your sizing by executing a performance and load test.</li> </ul>		
	If you have selected an AIX platform: <ul style="list-style-type: none"> <li>• Configure AIX according to the defined performance settings.</li> <li>• Install AIX with the correct C++ runtime libraries.</li> </ul>	SAP Note <a href="#">1282668</a>  SAP Note <a href="#">1430477</a> 	
	If you have selected a Solaris platform, configure Solaris according to the defined performance settings.	SAP Note <a href="#">1432292</a> 	
	If you have selected a Unix or Linux platform, set the resource limits according to the required minimum.	SAP Note <a href="#">1522123</a>  SAP Note <a href="#">1541213</a> 	
	Set up the development, QA, and production environments using the same operating system and database types.  Also ensure that patch levels and DBMS client and server versions are the same throughout the landscape.  This avoids discovering platform-specific issues at the last minute.	SAP Note <a href="#">1538595</a> 	
	If you are using Virtual Machine (VM) technology, take the defined restrictions into account.	SAP Note <a href="#">1070760</a> 	
	If you are using Cluster technology, take the defined restrictions into account.	SAP Note <a href="#">1363821</a> 	

Status	Task	More Information	Customer Comments
	Define the Oracle or DB2 database instance with a Unicode character set as defined in the MDM Installation Guide.	MDM 7.1 Installation Guides on SAP Help Portal at <a href="http://help.sap.com/nwmdm71">http://help.sap.com/nwmdm71</a> . Refer to the installation guide for your operating system.	
	If you plan to use MaxDB, ensure that each repository does not require more than 17 languages.	SAP Note <a href="#">1375403</a>	
	If you plan to use DB2, and if the repositories contain more than 14 languages, apply the required configuration.	SAP Note <a href="#">1277838</a>	
	Choose a unique SAP System ID for the MDM installation.	SAP Note <a href="#">1397260</a>	
	Install all MDM servers and DBMS servers on one LAN with a backbone of 1 Gbps.	SAP Note <a href="#">1278497</a>	
	Install MDM servers and MDM clients (for example, MDM Data Manager and MDM API) on the same LAN and set the network connection to at least 100 Mbps.	SAP Note <a href="#">1278497</a>	
	Ensure that the targeted MDM Data Manager users are data administrators and power users only (not more than 15 concurrent users).  Ensure that all other users are connected via Web-based clients.	SAP Note <a href="#">1512323</a>	
	Evaluate which workflow tool best fits your specific requirement. <ul style="list-style-type: none"> <li>• SAP NetWeaver Business Process Management</li> <li>• MDM Workflow</li> <li>• SAP Business Workflow</li> </ul>	<a href="#">Best Practices Workflow for Master Data Management Applicable</a>  <a href="#">How to Integrate Master Data Management and Business Process Management</a>	
	Use MDM Master-Slave architecture to receive the minimum response time possible for concurrent search and retrieve requests for read-only applications.	SAP Note <a href="#">1537158</a>	
	Ensure that source systems and destination systems are in Unicode format.  Otherwise include a non-Unicode/Unicode conversion solution in the project scope.	SAP Note <a href="#">1501810</a>	



Status	Task	More Information	Customer Comments
	<p>Verify that your source systems are capable of extracting delta information.</p> <p>Otherwise include using ETL for this purpose in the project scope.</p>	<p>For information about integrating SAP NetWeaver MDM and SAP BusinessObjects Data Services (DS) with its ETL capabilities, see <a href="#">SAP MDM and SAP Business Objects Data Services Integration Guide</a>.</p>	

## 3 MDM 7.1 Business Blueprint Checklist

Ensure that trials of the various functionality options are ongoing during the course of the business blueprint phase and that they are carried out in the early stages of project planning.

For more information, see [Project Planning \[page 6\]](#).



### 3.1 Data Modeling

Accurate data modeling is the foundation of a successful MDM project. Incorrect decisions made while designing an MDM repository can lead to performance problems, which, when discovered at a late stage of an implementation, can be very costly. The Business Blueprint checklist highlights the most important considerations to take into account and actions to carry out to optimize system performance.

For more information about the rationale behind the following checklist tasks, and a description of the best practices of data modeling, see [How to Avoid Problems with your Data Model in SAP NetWeaver MDM - Do's and Don'ts](#).

Table 5:




Status	Task	More Information	Customer Comments
	Define each master data object (for example, Product, Customer, Vendor) in a separate MDM repository unless at least one of the following conditions apply: <ul style="list-style-type: none"><li>• Cross references exist between these objects</li><li>• The objects share common lookup data</li></ul>		
	Include only master data in the data model; omit operational and transactional data.		
	Ensure that the MDM data model includes the minimum set of fields to serve the project scope by carrying out the following actions: <ul style="list-style-type: none"><li>• Trace the requirements for each table and field and relate them directly to the scope of the project. Omit surplus information that is simply a reflection of the source system.</li><li>• Avoid duplicate tables and fields</li></ul>		
	Define the majority of fields on Main tables rather than Lookup tables. Lookup tables should not include more than 15 fields.		

Status	Task	More Information	Customer Comments
	Ensure that the number of fields in each Main table does not exceed 100.		
	Ensure that MDM includes only the languages required for the current scope. Delete all other languages.	SAP Note <a href="#">1854202</a> 	
	Set the <code>multilingual</code> property to <code>No</code> for all fields that are not required as multilingual.	SAP Note <a href="#">1854202</a> 	
	Define justifiable fields for a Keyword search. We recommend that you do not define more than eight fields.  Set the <code>Keyword</code> property to <code>None</code> for all other fields.		
	Select display fields according to the minimum set of fields that can uniquely identify records in a table. Ensure that there are no more than three display fields in each table (except for Qualified tables for which the number can be higher).		
	Only define unique fields and combinations of unique fields for fields that have 100% fill-rate.  When unique constraint violations are checked by the system, null values are not considered.		
	Define the sort index for the following fields: <ul style="list-style-type: none"> <li>• Display fields</li> <li>• Fields that are frequently used in a Free Form search</li> <li>• Fields that serve as a matching key during import</li> <li>• Fields that are used for sorting result sets on the UI</li> <li>• Fields included in matching rules</li> </ul> Set the <code>Sort Index</code> property of all other fields to <code>None</code> .		
	As of MDM 7.1 SP08, use Large Text fields only when the expected text length is longer than 500 characters.  For versions prior to MDM 7.1 SP08, if the text length is longer than 333 characters, use Large Text fields.		
	Avoid Lookup tables (including non-qualifiers in Qualified Lookup tables, Hierarchy tables, Masks, and Named searches) with a potential of having more than several thousand values. This applies to all Lookup tables whether they are referenced from another table or not.		

Status	Task	More Information	Customer Comments
	Use key mapping to store master data keys rather than transactional keys.  For example, invoice numbers are transactional keys and should not serve as remote keys.		
	Use Lookup or Free Form searches as a base for Named searches that serve as role constraints, rather than use expression-based searches.		
	Ensure that the number of attributes in the Taxonomy table does not exceed several thousand.		
	Ensure that the number of values in each text attribute in the Taxonomy table does not exceed several hundred.  Define text attributes with the potential of having more than several hundred values as fields rather than attributes.		
	Use a Lookup [Main] field to link two different Main tables, rather than create a third Main table that acts as a link table.		

## 3.2 Master Data Server (MDS) Configuration

Table 6:

Status	Task	More Information	Customer Comments
	Starting from MDM 7.1 SP06, the <code>Extra DBConnection Validation</code> parameter in <code>mds.ini</code> will be ignored.  For versions prior to MDM 7.1 SP06, set the <code>Extra DBConnection Validation</code> parameter in <code>mds.ini</code> to <code>False</code> .	SAP Note <a href="#">1407940</a> 	
	Set the <code>Skip Unchanged Records</code> parameter in <code>mds.ini</code> to <code>True</code> .	SAP Note <a href="#">1345234</a> 	
	Ensure that the <code>Stemmer Install Dir</code> setting in <code>mds.ini</code> remains empty unless there is a specific requirement for stemmer usage.	SAP Note <a href="#">1522782</a> 	

### 3.3 Import and Syndication Setup

Table 7:

Status	Task	More Information	Customer Comments
	Configure MDS for required availability during mass updates.  <div style="background-color: #fff9c4; padding: 5px;"> <p><b>i Note</b></p> <p>In MDM 7.1 SPO6 and higher, additional parameters are available for slicing mass updates to improve performance in multi-user environments.</p> </div>	SAP Note <a href="#">1376342</a> <a href="#">MDM Console Reference Guide: MDS Administration - Optimizing Performance During Updates</a>	
	Define file aggregation for Master Data Import Server (MDIS) ports, if the source system extracted data is in the form of multiple small files (for example, a single record file).	SAP Note <a href="#">1347733</a>	
	Carry out the procedure in SAP Note 1288622 if syndication of Relationships is required.	SAP Note <a href="#">1288622</a>	
	Carry out the procedure in SAP Note 1491326 if syndication of Hierarchy tables is required.	SAP Note <a href="#">1491326</a>	
	Ensure that matching fields in all import maps are enabled with Sort index.	SAP Note <a href="#">1818124</a>	
..	Minimize the rate of syndication tasks.	SAP Note <a href="#">1810026</a>	

### 3.4 Data Manager Setup

Table 8:

Status	Task	More Information	Customer Comments
	Set the maximum multi-record value display in the <i>Record Detail</i> pane to less than 100 in all MDM Data Manager clients.	SAP Note <a href="#">1536218</a>	
	Set the Retrieve Modifications Delay Seconds parameter to 30 if mass updates are planned in parallel to MDM Data Manager activities.	SAP Note <a href="#">1376342</a>	

## 3.5 Matching Setup

Table 9:

Status	Task	More Information	Customer Comments
	Define matching rules and strategies according to the provided guidelines.	SAP Note <a href="#">1294643</a> <a href="#">How to Optimize an MDM Matching Process</a>	
	When using MDM 7.1 SPO6 or higher, define <i>Required Fields</i> whenever possible to optimize matching performance.	<a href="#">MDM Data Manager Reference Guide: Matching Mode: Improving Match Speed with Required Rules</a>	
	Free the objects allocated by MDS during Java API matching command execution.	SAP Note <a href="#">1766818</a>	


## 3.6 MDM API-Based Applications

Table 10:

Status	Task	More Information	Customer Comments
	Ensure that Session Management in applications using Java API is carried out according to the provided guidelines.	SAP Note <a href="#">1508762</a>	
	Use Event Notification Filtering when using Java or .NET API with MDM 7.1 SPO6 and higher.	<a href="#">MDM 7.1 Java and .NET API Guide: Concepts : Events</a>	
	Map all read-only Web users (Portal iViews and UWL users) to a single MDM user. Only those users, whose updates require auditing tracking, should be mapped to a distinct MDM user.	SAP Note <a href="#">1509199</a>	
	Configure the MIN_CONN parameter that specifies the minimum number of connections to the SAP Gateway when using the ABAP API with MDM 7.1 SPO6 and higher.  This prevents RFC bottlenecks when there is a high concurrent load on MDM.	<a href="#">MDM 7.1 ABAP Guide: Configuring the MDM ABAP API : Configuring the MDM Server</a>	





## 3.7 Transport Setup

Table 11:

Status	Task	More Information	Customer Comments
	<p>Do not include value mapping in the maps when transporting import maps.</p> <p>To avoid value mapping, define <i>Automap</i> based on key mapping, or alternatively, make sure that lookup and attribute values in the source systems are identical to those in MDM.</p>	SAP Note <a href="#">1328938</a> 	






## 3.8 Essential Cleanups

Table 12:

Status	Task	More Information	Customer Comments
	Include the standard procedure for cleaning up repository folders (for example, distribution folders, reports folder) in the project scope.	SAP Note <a href="#">1496235</a> 	
	<p>Include the standard procedure for cleaning up completed workflows in the project scope.</p> <p>In MDM 7.1 SP06 and higher, use the CLIX command when carrying out the cleanup.</p>	<p>SAP Note <a href="#">1240587</a> </p> <p><a href="#">MDM CLIX Commands</a></p>	
	Include the standard procedure for cleaning up the Change Tracking table in the project scope.	SAP Note <a href="#">1343132</a> 	
	If mass changes have been made to the data, or new remote systems have been defined in MDM, advise your database administrator to recalculate the statistics for DBMS tables.	SAP Note <a href="#">1242204</a> 	

## 3.9 Supportability Setup

Table 13:

Status	Task	More Information	Customer Comments
	Install the MDM Configuration Assistant tool to assist in the correct configuration of <code>mds.ini</code> parameters.	SAP Note <a href="#">1543650</a> 	
	Install the MDM Info Collector to enable offline analysis of product errors by SAP Support.	SAP Note <a href="#">1522125</a> 	
	Install the MDM Log Viewer to facilitate reading, sorting, filtering, and searching MDM logs.	SAP Note <a href="#">1539549</a> 	
	Prepare your landscape for remote support by setting up the required network connections.	SAP Note <a href="#">1251022</a> 	
	Enable end to end diagnostics for MDM using SAP Solution Manager.	SAP Note <a href="#">1268326</a> 	

### Note

Contact SAP Support to learn about additional services to maximally safeguard your project.



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# Important Disclaimers and Legal Information

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