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Streamlining Material Master Data Authoring: How A Global Company Improved Data Quality and Drove Efficiencies with Precisely

The Background

To manage a global supply chain network, such companies must work across various business units and plant locations, all the while seeking to maintain visibility into their operations and contend with the added complexity of numerous acquisitions and expansions.

For such global businesses to effectively scale and maintain operations, data-driven decision-making is crucial; and for most, enterprise resource planning (ERP) platform analytics hold the key to extracting actionable insights from business data.

At one such company, which needed to accurately and effectively manage material master data — detailing the specific attributes and characteristics of these resources in fields such as description, classification, dimension, unit of measure and pricing — had long been the foundation of both its inventory management system and its broader supply chain operations. The business experienced challenges with material master data management.
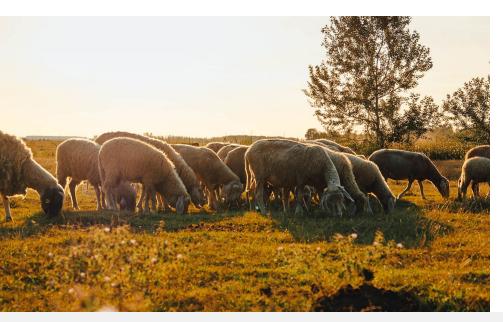
The Initiative

Within the company's challenges with material master data maintenance, leaders saw a significant opportunity for business transformation. Streamlining systems, applications, and processes could allow the business to improve visibility into the inner workings of its global manufacturers and plants and simplify the forms required for material master data authoring, also engaging automation and enhancing security.

"We knew we wanted the process to be user-friendly," said one employee. This employee and their team wanted new forms and systems to be as automated as possible and end-users to feel confident using technology solutions for master data authoring.

The data team identified Precisely, a software company specializing in data integrity tools, as a partner who could empower their business to reimagine the material master data authoring process and achieve additional business transformation goals. The data team then set about identifying every detail of material attributes and workflows, working alongside internal stakeholders and Precisely.

The Solution

The business had previously leveraged Winshuttle's SAP process automation platform Evolve, designed to digitize and automate strategic data processes. After Precisely acquired Winshuttle in 2021, the platform became Automate Evolve, the only platform designed to digitize and automate complex SAP data processes across SAP landscapes, including materials, vendor and customer processes. Automate Evolve ultimately provided the company with the support it required to build flexible workflows, steward its material master data, improve automation, and deepen its SAP integration.

Entering a new material required over a hundred fields and 18 separate screens, requiring the team to learn all rules around SAP configuration. Additionally, the process requirements needed to be approved by the business.

The design phase of the project involved documenting the current state workflows, interviewing the SAP functional analysts to explain the specifications and limitations of the ERP system, understanding the regulatory requirements, and collaborating with the development team to assess what was technically possible to achieve within the forms. Together, these stakeholders reimagined the forms necessary to achieve a more robust and efficient material master data authoring process.

Process workflows and business roles determined different dependencies; the Automate Evolve platform then administered which stakeholders could fill out specific fields in the form, enhancing field-level and role-level security. Only the appropriate business roles were granted access to edit specific fields, reducing the potential of errors, increasing data quality, and simplifying workflows.

Precisely also worked together to limit the number of values visible to end-users within these material master data management forms. For example, the ERP system displayed 63 material types, but with the form, they reduced the options to the 9 in use.

The flexibility and extensibility of the Automate Evolve platform established a solution architecture that allowed the comapany to digitize and strategize its data processes, according to a senior data engineer within the company.. Today, the data team even has access to web development capabilities within the form, making it similar to using an application for the end user, he said.

The Results

Powered by SAP and Precisely, the company's streamlined material master data management process enables business users to create or update multiple related material fields in a single form while benefiting from increased data stewardship capabilities such as required fields, smart form logic, role-based web views, and field standardization.

Today, the company enjoys greater visibility of its business data and processes, and the experience of adding and tracking material master data has never been simpler. All of these efforts resulted in a more user-friendly experience that reduced complexity in completing forms; the role-based web views mean that business users once tasked with navigating 150-plus fields could instead look through 34, for example.

"You're only looking at the data fields that matter, specifically for your role."

Previously, the company's system, directly connected to SAP, tasked business users with navigating 18 views; through transformation with Precisely, business users only have one view for creating or updating multiple related material fields, and the time spent **completing this single form has dropped from an average 30 minutes to just five**.

"The best form is one that users aren't complaining about," said the company's data governance lead.. To that end, the new form has received great feedback from its 30-plus users, who've called it "intuitive, straightforward, and easy." One user noted their job has become easier now that the rote memorization of codes and fields previously required is a thing of the past.

"Success for this project looked like a complete material record that business users could add to a purchasing order and use in their operations day to day," She explained. Mission: accomplished. "The vision that we had in mind is now in practice," the senior data engineer added.

By leveraging Precisely's [Automate Studio solution](#), **organizations can create material 89% faster and change material 77% faster**. With these time savings, efficiencies improve, order fulfillment can be streamlined, and companies can view more reliable, comprehensive data around business performance, making stronger data-driven decisions as a result.

Lessons Learned

At the outset, the data team didn't have a complete understanding of how all the SAP fields functioned or their dependencies. "We started to realize what we needed and started tightening down business rules," the senior data engineer said. "It was an iterative process."

As a result, upfront work was fairly extensive, because the team didn't know what they didn't know, multiple individuals on the company's data team agreed. What advice do they have for other teams at the outset of such a transformation? "Invest in the development process, because the development process and the requirements gathering process are very critical," said one employee. While this proved time-consuming, it ultimately saved time and money down the road.

As the data team gains experience and rolls out similar forms to other lines of business across the company, project stakeholders expect the process to improve, and they'll meet all the stakeholder needs that they encounter along the way. Often, one employee noted, lines of business within the company will be able to overcome historical data challenges by building data quality into the Automate Studio authoring forms design, so long as those challenges are identified upfront.

The data team will also continue to focus on training end users, both to prioritize internal upskilling and to ensure that end-users become stakeholders, buying into the process improvements and ensuring the larger success of material master data management.
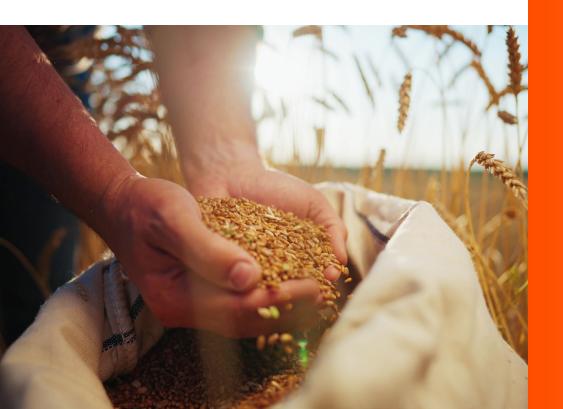
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Precisely is the global leader in data integrity with a remarkable 50-year heritage, empowering businesses to make more confident decisions based on trusted data with maximum accuracy, consistency, and context through a unique blend of software, data, and strategic services.

Precisely Automate, a key part of the portfolio, enables business users to automate complex, data-intensive SAP business processes and make mass data changes quickly and easily. What exactly will those successes look like? Think swifter SAP processes, improved governance, reduced costs, and better data integrity – overall, a more efficient, powerful new approach to your SAP master data management.

For more information, visit www.precisely.com/sap

ASUG

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