

Strategy for Product Allocation Master Data Management



Applies to:

SAP R/3, ECC 6.0. For more information, visit the [Master Data Management homepage](#).

Summary

Master Data management strategy forms an important factor for a successful implementation of Product Allocation Solution. We discuss some data management strategies that support business requirements and environmental factors to effectively execute Product Allocation.

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Business case for Product Allocation Master Data Management

Product Allocation¹ is a complex business function² to implement and some of its complexity stems from the complexity to manage the Product Allocation Master Data. Hence, an effective Master Data management strategy becomes important factor for a successful implementation of Product Allocation. In the following section we will look at some of the ways to successfully manage Product Allocation Master-data requirements. Strategies can be devised using some of these ideas that suit ones business requirements and environmental factors.

Product Allocation Master-Data

Master-data is very important factor for Product Allocation as it is for other SAP transactions. There are various business phases with different master-data requirements. In our discussion we outline a strategy to manage Product Allocation by considering some typical conditions arising during different business phases and the associated Product Allocation master-data requirements that result due to these business needs.

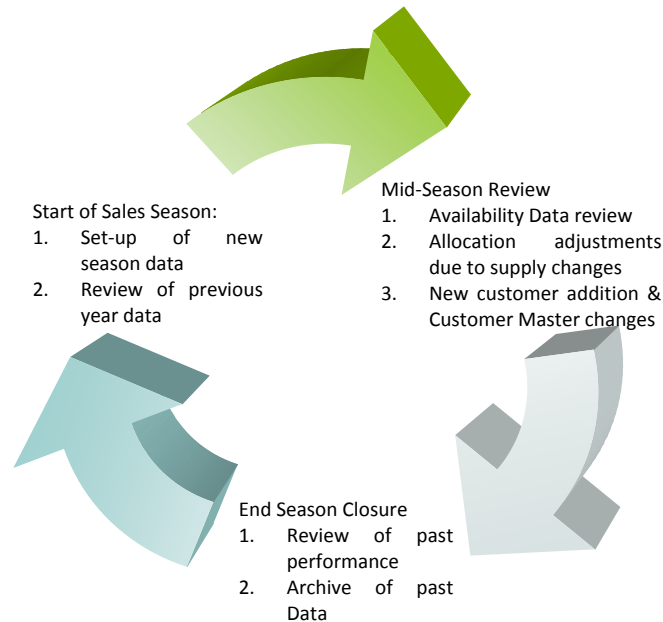


Diagram: Product Allocation master-data requirements at various phases of business

It is also important to discuss here the actual master-data components that form part of Product Allocation in SAP.

The first of this is the Product Allocation data in Info-Structure (like data in S140).

The second is the associated Planning Hierarchy that supports this data maintenance (that exists in S140E).

The data in both these places needs to be managed in order that the Product Allocations works perfects in a Business Scenario.

Strategy for managing Product Allocation Master-Data

Now we discuss the Strategy to manage the Product Allocation Master-data requirements depicted in the scenario above and see how some SAP tools can be utilized, in each of these phases, to manage these:

1. Start of Sales Campaign – Initial Data setup for new Season

The start of Campaign will require clearing/Archive of previous season data in the Product Allocation Info-structure under version 000 (like S140). Archiving should generally be carried out as part of Close of Sales Season and we will discuss regarding the same in the following document part.

Normally the start of campaign will require a huge volume of data to be setup as part of allocation set-up. Doing the same manually via standard transactions (like MC61/MC62- create/change planning Hierarchy; MC93/MC94- create/change plan in flexible planning) in SAP will be ineffective and time consuming. An effective and fast way is to develop a Custom tool to update this data directly in mass. A suggested tool for this is *Tool A*, discussed later in this section.

Once the data has been uploaded in the info-structure, standard transaction MC9A (- setup planning hierarchy master data based on Planned/Actual version) can then be used to create the hierarchy part of data automatically (data in S140E). This not only ensures that the data is consistent in the system but immensely reduces data setup effort in the system. The entire hierarchy is build automatically against time consuming single transactions of MC61/MC62.

For the upload of data as discussed earlier a simple custom program can be developed in SAP utilizing some of the standard functionality provided by SAP. The steps required for set-up of *Tool A* are as follows:

- a) Create a Structure with technical team's help (similar to Allocation Info-structure) to pass data into Allocation Structure (transaction SE11)
- b) Create custom update event (transaction MCZ1) for the info-structure with reference of the above communication structure, to generate a set of function modules for update
- c) Create update event for the above (MC24) to update data into info-structure
- d) Use the function module generated in step b in an ABAP program, to update data in mass into info-structure

2. Mid-Season Review of Data – Change of Data to adjust business requirements

There are lot scenarios where mid-season, or some appropriate time period, when changes are required to the product allocation data. Some of these scenarios are discussed as follows:

- a) Sales Department starts sales season with specific quota defined for each of their customers. When they have managed to 80% of the products they wish to move from a more specific allocation (eg. sold-to-party level in S140) to a more generic level above, (eg customer group level in S140). This is done to manage the residual 20% sales effectively.
- b) Customer Service carried out changes to Customer's sales areas or acquires new customers during the season. These will require update of Product Allocation master data in order to maintain business operations.
- c) Supply Manager updates supply figures and correspondingly the overall product availability needs to be changed.

All the above scenarios can be managed via some standard SAP transactions supported by few custom developed data transformation routines.

LIS Copy Management: MCSZ is a very effective transaction present in Standard SAP to manage some of the data transformation mentioned in scenarios (points a to c) above. It already incorporates many useful data transformation capabilities to copy data from one version to another (or among info-structures of similar nature). In addition, MCSZ also provides some key ideas in developing custom data transformation routines. Any advanced data transformation can be programmed via creating a custom copy method with help from technical ABAP team.

Standard SAP transaction like OLIX (Copy Delete versions of info-structure) can be used to manage data in the info-structure like archiving the current data to another version (say 901) before the actual data in version 000 is changed.

The Strategy here is to manage large changes like revision of product allocation set-up via mass processing programs (like the Tool A) in addition to the copy routines created in MCSZ. Small changes to data, like addition of a new customer, should be handled via standard SAP transactions like MC62 (change planning Hierarchy) and MC94 (change plan in flexible planning).

3. End-of Season Archive – Review & Archive of previous season Data

The end of a sales season brings up a lot opportunity to review the performance of the past sales season and reconcile the learning from the past season. The data from the past season can at this point be archived, by removing it from the actual version 000 to some other version (or info-structure). The archived data can be utilized for analysis and reporting. The same data can also act as a starting point for the preparation of next year Product Allocation Master Data. This is useful as a starting point rather than starting from scratch.

The standard SAP tool like OLIX (Copy Delete versions of info-structure) is again an effective tool to manage this business requirement. In addition, custom applications can be built to download the previous year data into a template directly that the Allocation manager can use to work on the next year numbers.

Other Success factors

There are some other ergonomic aspects that can be incorporated in the design strategy that prove effective when working in such scenarios. These are not specific to Product Allocation Data management but can be applied to any scenario equally. These small points will make work easier and improve efficiency.

1. Always develop adequate reporting on Product Allocation master data and have proper error handling for the custom objects created.
2. As the data being handled for product allocation can be humongous it always benefits to have background execution option in most of the custom reports being developed.
3. When working with background mode of execution plan for interface with attached UNIX system to enable working even when you are not online.

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2. <https://www.sdn.sap.com/irj/scn/index?rid=/library/uuid/d0c0b890-ac75-2b10-d8ad-b8cecdea8d3f>
3. For more information, visit the [Master Data Management homepage](#).

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