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# Solution brochure

# d.velop procurement for SAP ERP

Purchase requisition workflow in SAP ERP

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# Purchase requisition for your SAP ERP

This solution, developed specifically for SAP, stream-lines the entire ordering process from the initial re-quirements determination and purchase requisition, through processing purchase orders and reporting. Automating the ordering process significantly cuts processing times providing both greater employee satisfaction and considerably lower costs per pur-chase order. The increased transparency allows orga-nisations to anticipate and proactively manage finan-cial liabilities.

## Is there a need in your company?

At the beginning of the ordering process, the require-ments determination provides a clear overview of products and goods needed by the organisation. At the next stage, the purchase requisitions are created in SAP according to the determined requirements. In order to create purchase requisitions, users can choose between a web interface and a transaction in the SAP GUI, both provided by the d.velop classifier platform. Creating the purchase order in SAP is the last step for organisa-tions using the SAP MM module.

Once the purchase requisition has been submitted using the d.velop classifier, an approval workflow based on the SAP Business Workflow is started in SAP. The next steps are the verification and approval followed by the option to complete the purchase requisition. The approval step can involve multiple sign-offs and can be subject to customisable approval limits. After the final approval, the purchase order can be created in SAP MM by the workflow (customisable option) or by user request. The process as well as the purchase requi-sition workflow are completed with the creation of the purchase order.

## Purchase requisition made easy

The user can create purchase requisitions either with the web interface or with a transaction in the SAP GUI. External web procurement catalogues provided by pre-ferred vendors can easily be integrated using the OCI interface in SAP. Users can select products and items from these catalogues and add them to the purchase requisition, as simple as everyday online shopping.



*The requirements determination is at the beginning of the ordering process.*

The workflow history automatically keeps track of all activities with the relevant time stamps, user IDs as well as user notes throughout the workflow. Custom fields are provided within the solution to capture additional information required for the purchase requisition process of the organisation. All information known by the user such as material or product data, buying group, company code, etc. can be added. Supporting documents can be uploaded and attached to the workflow either by drag & drop or by selecting a file from the PC. These documents are automatically and securely archived in the content repository using the SAP ArchiveLink interface.

## Verification made easy

The first workflow step after submitting the purchase requisition is the verification. During that step the purchase requisition can be reviewed, rejected, or the task can be delegated to another user. If further information is required, the verifier can send a query to any person involved in the process – such as the initiator of the requisition.

Users can flag a workflow task for (personal) later processing in case that a group of verifiers is responsible for the workflow step. The verifier can be prompted to add a comment if the purchase requisition is rejected, another setting that is part of the straightforward customising as well as the configuration of the amount of required approval levels (up to 9 levels possible).
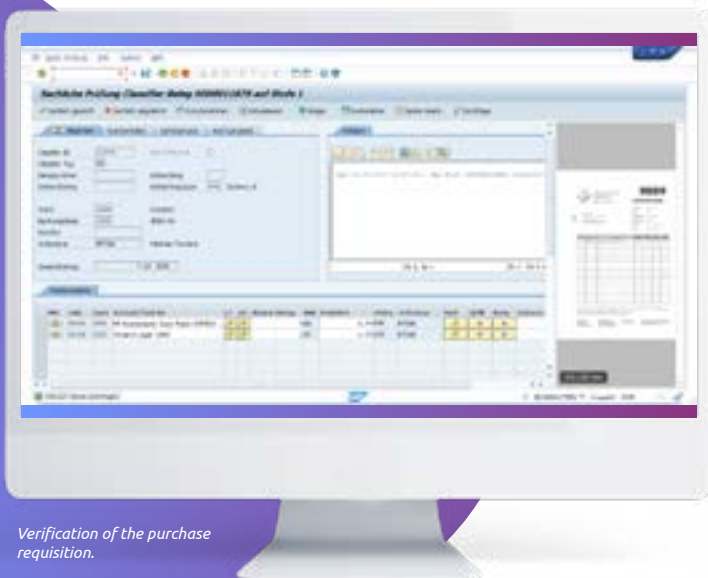


*Verification of the purchase requisition.*

## Approval made easy

Once the verification is complete, the purchase requisition workflow is sent to the person(s) responsible for approval. The automatic agent determination feature can be customised to assign the person(s) responsible for the approval workflow step based on information from SAP objects or from d.velop classifier objects.

The d.velop classifier cockpit provides a clear overview of all workflows for every user. Open workflow actions can be performed directly from the cockpit without switching to the SAP Business Workplace. Alternatively, the person responsible for approval may also sign-off the purchase requisition using the web interface. Email notifications can be activated and customised to help reducing workflow processing times.

Again supporting documents can be uploaded and attached to the workflow either by drag & drop or by selecting a file from the file system. These documents are automatically and securely archived in the content repository using the SAP ArchiveLink interface. This feature is available in both the web interface as well as the SAP GUI in the verification, approval and completion of the purchase requisition. A mobile app is available for iOS and Android for roaming users approving purchase requisitions on mobile devices such as smartphones or tablets.

After final approval, the purchase order will be created in SAP MM by the workflow, or as customisable alternative, the workflow is just finished without creating a purchase order.

## Creating the purchase order in SAP

If the purchase requisition is converted to a purchase order in SAP MM, the purchaser or other person responsible can complete the purchase order data through SAP transaction. Access to web catalogues is provided for easy selection of materials or products from preferred vendors using the SAP OCI interface standard. At this stage, the workflow task can be delegated, returned to the verification step, queries can be made, or the task can be finished by finalising the purchase order in SAP MM. The workflow history provides an overview of all activities and events throughout the workflow. The process is finished when all the required information for the purchase order is completed in SAP. The new purchase order can be accessed directly from the d.velop classifier cockpit and all supporting documents can be displayed through the generic object services of the purchase order. For even more convenience, the SAP MM document flow including all related ArchiveLink documents can be displayed in a clear overview using the d.velop smart folder for SAP ERP MM (available as an additional d.velop product).
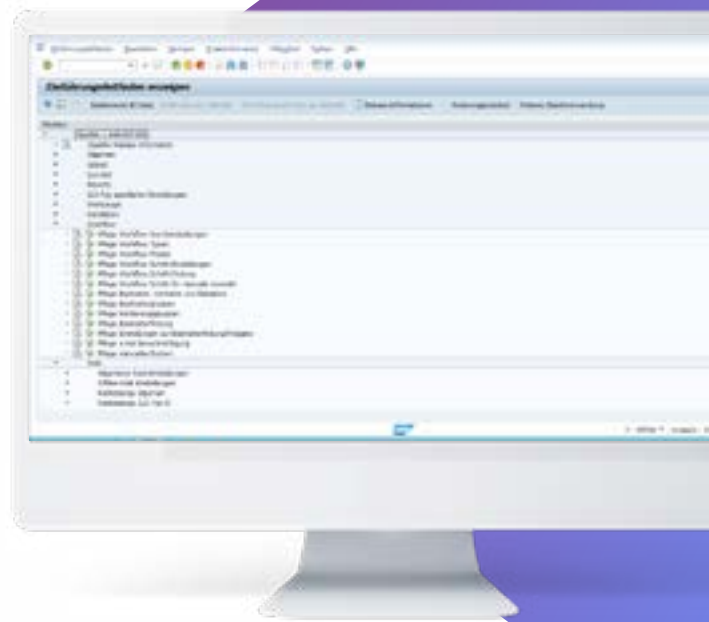
## Customising implementation guide

The d.velop classifier platform comes with a comprehensive customising implementation guide. It also includes pre-configured templates for the business process solutions such as purchase requisition, goods receipt and accounts payable automation. The d.velop classifier cockpit provides a complete overview of the entire purchase-to-pay process with access to all relevant information as well as SAP documents and transactions. The customising implementation guide allows comprehensive customer-specific changes by simply adjusting parameters and settings.

The following list shows some examples of possible customisation:.
- Email notification for new workflow tasks
- Email notification for workflow escalations
- Four-eyes-principle for approval and verification
- Amount of required levels for approval and verification
- Fundamental change of the workflow sequence logic
- etc.

### Easy to use

- ✔ Improved efficiencies due to the completely digitised process
- ✔ Complete transparency and lower costs per purchase order
- ✔ Purchase order data classified and captured automatically
- ✔ Automated provision of document templates
- ✔ High level of process automation through direct document parking in SAP
- ✔ Efficient processing and archiving of supporting documents (Attachments, Purchase orders, Proof of delivery, Audit trail, etc...)
- ✔ Advanced reporting and analytics
- ✔ Cross-location work
- ✔ Collaborate across multiple locations, companies, or SAP systems even with users without SAP access

Customising implementation guide overview

# d.velop AG's SAP expertise

Are you looking for a team of experts, who have operated successfully in the SAP ERP environment for years? Then you have come to the right place. d.velop AG currently has more than 7,900 installations of the ECM suite d.3ecm, who often have several thousand users.

More than 1,800,000 registered users use the solutions of d.velop AG. A focus of our projects is the system integration with SAP ERP systems. Currently over 700 customers use d.velop products in the SAP business environment. This environment includes prestigious companies, some with very complex system environments and several interlinked SAP systems. SAP solutions are strategically positioned in d.velop AG and tested and developed in our „state of the art" SAP centre.

We would be happy to answer any further questions or provide a no commitment presentation of our solutions. Working with d.velop AG you will receive a strong and practice-orientated consultation from our specialists. Contact us, our passion is helping you get more from your investment in SAP.
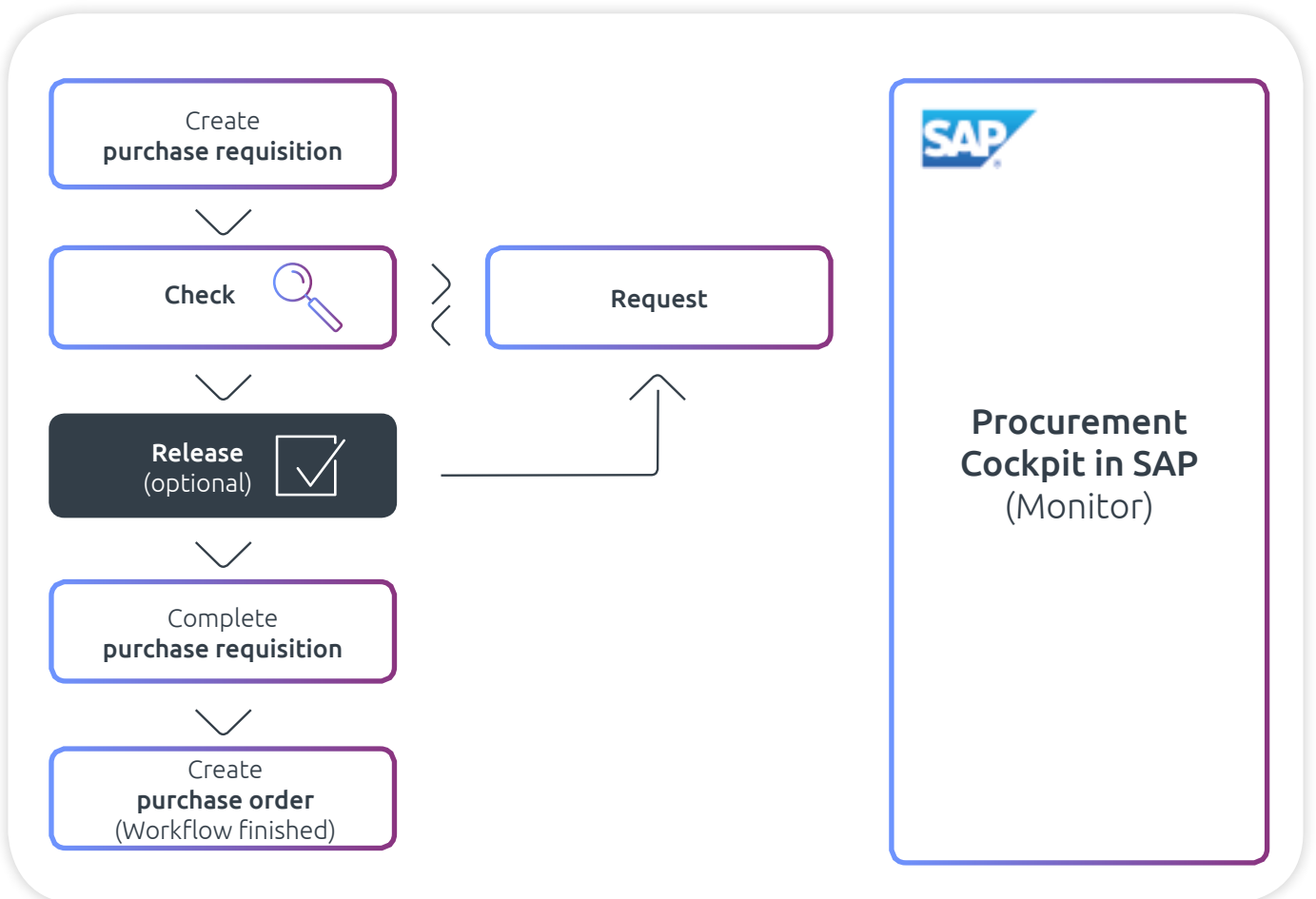


*Overview purchase requisition workflow*

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# d.velop procurement for SAP ERP - „step-by-step"

## Step 1: Create

- Create purchase requisitions easily with the web inter-face or with SAP GUI.
- Add items conveniently to the purchase requisition using integrated web catalogues provided by prefer-red vendors.

**Optional:**

Notes and supporting documents can be added to the purchase requisition.

## Step 2: Verify & Approve

- Verify and approve, reject or delegate purchase requi-sition workflows.
- Flag group tasks for (personal) later processing.
- Automatic agent determination feature. Cockpit pro-vides clear overview of all workflows.

**Optional:**

Completion of the purchase requisition data.

## Step 3: Order

- Conversion of purchase requisition to purchase order in SAP MM.
- Access and display all related documents through the generic object services in SAP GUI.
- Access purchase order directly from the cockpit.

**Optional:**

access documents with the d.velop d.3ecm smart ex-plorer or d.3one from within SAP ERP.

### Do you have some ideas for a Purchase-to-Pay project?

We are happy to advise you. Let's discuss concrete options for implementing a digitalized P2P process at your company.

**Stephanus Schürmann, Head of New Business**

**CONTACT US**

# d.velop

## About d.velop AG

d.velop AG, founded in 1992 and based in Gescher, Germany, develops and markets software for the complete digitization of business processes and industry-specific procedures. In addition to its established ECM portfolio of services relating to document management, archiving and workflows on mobile apps as well as standardized and custom SaaS solutions, the software manufacturer has also expanded to offer managed services. These services include sophisticated compliance management to provide legal certainty and ensure compliance with all statutory regulations.

d.velop helps businesses and organizations reach their full potential by offering digital services that connect people to each other and that simplify and retool procedures and processes.

A strong, global network of around 250 specialized partners ensures that d.velop Enterprise Content Services are available worldwide.

d.velop products — whether on premises, in the cloud or in a hybrid form — are now used by more than 7,900 customers across multiple industries with over 1.8 million users; these customers include Tupperware Germany, eismann Tiefkühl-Heimservice GmbH, Parker Hannifin GmbH, Nobilia, Schmitz Cargobull, FingerHaus GmbH, the city of Wuppertal, Basler Versicherungen, DZ Bank AG, Saarland University Medical Center and Greifswald University Hospital.

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