SER GROUP

BEST PRACTICE

> *„It was important for us to be able to depict well structured and ad hoc processes with only one technology. Doxis4 BPM provides us the right hybrid solution."*
>
> Ralf Everding, Application Specialist, IT, Raffinerie Heide



COMPANY	Raffinerie Heide GmbH
TOPIC	Project approval workflow with Doxis4 BPM
INDUSTRY	Power generation, oil refinery
EMPLOYEES	500
REVENUE	2.7bn euros (2014)
HEADQUARTERS IN	Hemmingstedt, Germany
INTEGRATION	SAP budget planning tool
PROJECT ROOM	Germany

RAFFINERIE HEIDE

CHALLENGES

- Many different project-related approval processes, e.g. for rebuilding production plants, building plans, software projects in the IT department
- Various decision-making levels, dependent on the order sum
- Long process times, successively processed paper-based proposals

TARGETS

- Securely manage project approval processes
- Ensure electronic availability of all proposals and documents of an approval process
- Accelerate the approval process through parallel processing
- Create transparency in every process step

SOLUTIONS

- Electronic project approval workflow for all types of projects with Doxis4
- Integrated solution connected to budget planning system and SAP (via ArchiveLink and RFC)
- Workflow-managed invoice auditing

PROJECT OVERVIEW

STARTING POINT

In 2013, Raffinerie Heide GmbH began to build an IT system landscape with an SAP system and an ECM solution as a platform to manage document-supported business processes and electronic records. With this landscape in place, the company started in 2015 to design a more secure and effective project approval process. The project approval workflow was supposed to create, edit and grant approval of proposals. The project documents, e.g. cost estimates, offers, etc., were to be electronically attached to the proposal and made accessible for every project participant. The goal was to create an integrated solution based on Doxis4 iECM, on the newly developed budget planning tool, and on SAP solutions for project planning, approval and processing.

WHY SER

- On one platform, Doxis4 BPM enables hybrid solutions for both structured and ad hoc processes.
- SER follows the "design-by-doing" approach to quickly implement new solutions

SOLUTIONS

Doxis4 BPM project approval workflow based on the Doxis4 iECM suite, eRecords, archive

INTEGRATION

SAP budget planning tool

DOCUMENT VOLUME

Transferring approx. 35,000 process instances (project approvals and invoice receipt audits) from the legacy system

USERS

50 employees work in the project approval workflow In total, all 300 Doxis4 users participate in the workflows

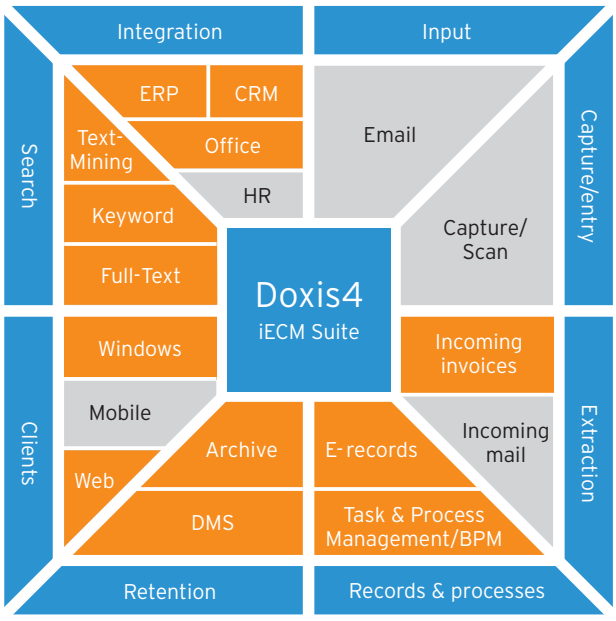
IMPLEMENTATION

- Q2/2015: Doxis4 project approval workflow launched
- Q4/2015: Project approval workflow migrated to new product generation Doxis4 BPM. The process was adopted without changes. All process instances migrated from the old workflow
- Q1/2016: Doxis4 project approval workflows integrated into the leading budget planning tool
- The workflow-steered invoice audit system switched to Doxis4 BPM
- Starting March 2016: Ad hoc workflows for depicting change management processes

BENEFIT

- Drastically reduced process times for project approval proposals
- The project manager always knows now who is currently working on a process instance
- All project documents can be viewed and accessed by every participant
- More flexibility in process modeling: With Doxis4 BPM, predefined processes can be supplemented with ad hoc tasks
- Doxis4 BPM manages the processes. No step is left out; every participant is notified per email (Outlook) when a task is waiting in their workbasket for them

Doxis4 MODULES



Doxis4 modules used by the Raffinerie Heide GmbH are highlighted in orange