



AUTOCENE

A NEW ERA IN AUTOMATION

Autocene Use Case Series

Customer:
Fortune 150 Pharmaceutical Firm



Vendor Onboarding with Integration to SAP

August 2020

Summary

This multinational pharmaceutical company had grown through acquisition and acquired various companies along with their maze of different systems and processes. One thing was standardized across the board, SAP was the ERP system of choice.

Each division, and often each department, selected their own vendors to work with. The checks and balances were just not there. The process to get a new vendor onboard was cumbersome and onerous for the business user. The process took 3 to 4 weeks from when the new vendor was identified until a purchase order was able to be placed with them. The business users were unhappy with how long the process took, the purchasing department was unhappy the numbers of new requests that had to be processed, and management was unhappy at that it was affecting productivity.

The Autocene Customer Success team worked with various stakeholders to reengineer and automate the process. Several unnecessary steps were eliminated to reduce the time needed for the process from an average of 16 business days to just three days.

One area of significant time savings came by using Autocene Passport to provide an integration with SAP where (after vendor approval), the profile information was loaded directly into the ERP system. This case study will provide additional information on the process before and after the implementation of the Autocene solution.

The Vendor Onboarding Challenge

How many vendors are required to keep a global pharmaceutical corporation running? Thousands!

Understandably, those selected vendors are required to go through a very stringent vetting and approval process before joining the ranks of suppliers to a Fortune 150 company.

The original process started something like this:

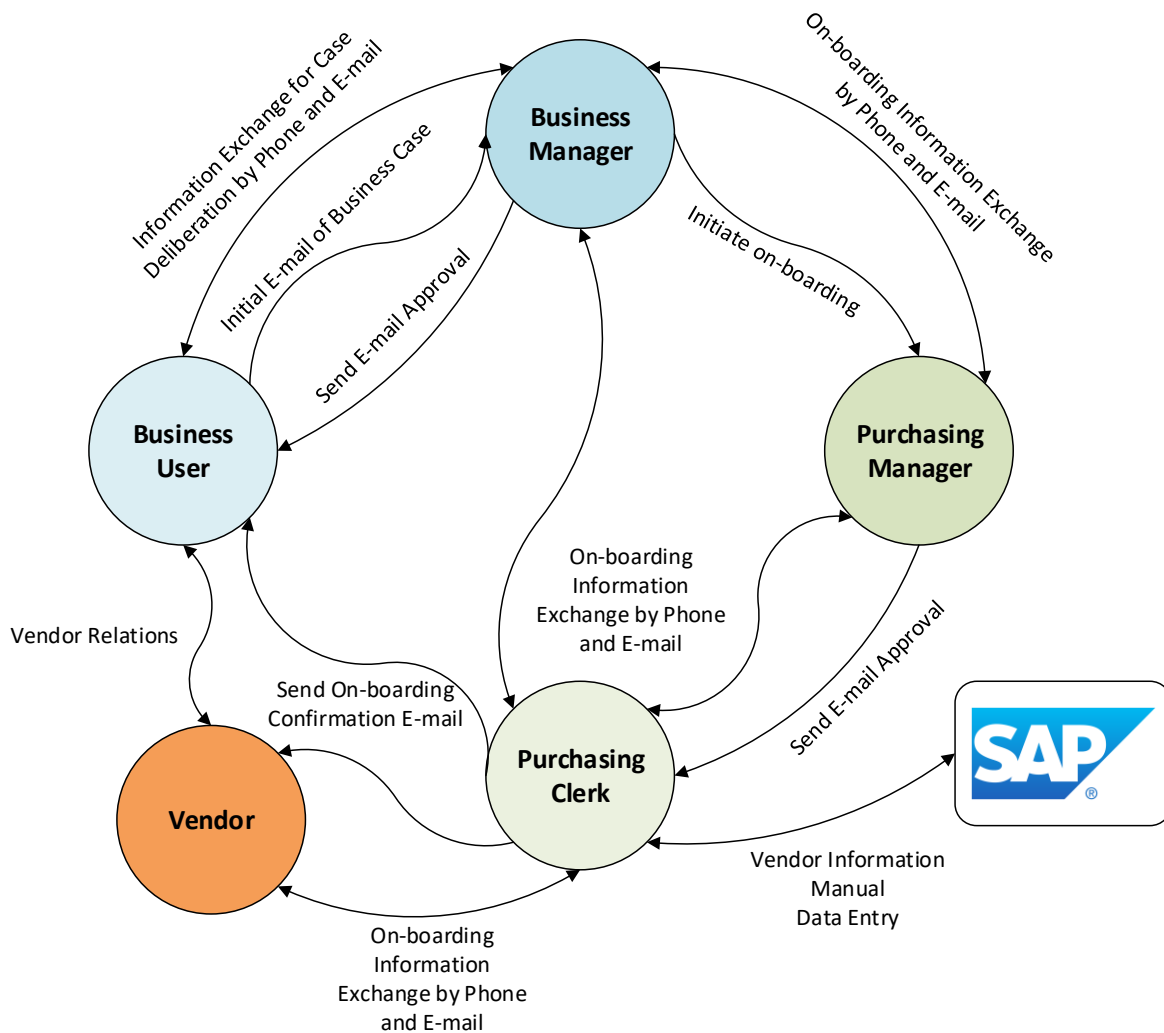
1. It begins with a business user identifying a new potential vendor.
2. That business user provides their departmental manager with some basic information and a business case of why adding this vendor makes sense.
3. The department manager either:
 - a. Approves the business case,
 - b. Rejects the business case & the vendor, or
 - c. Requests additional information
4. If that step is successful, the department manager approves the process to proceed by asking the purchasing department to start their review process.
5. The purchasing department assigns a clerk to collect all of the background information required
 - a. Tax jurisdictions,
 - b. Bank information,
 - c. Payment terms,
 - d. Etc.
6. The Purchasing clerk then returns with a complete profile of the vendor
 - a. Depending on the type of vendor, and types of goods, there are different paths of approval. So, the appropriate purchasing manager then reviews the information and can:
 - i. Approve the vendor
 - ii. Ask for additional information, or
 - iii. Reject the vendor

If all of those steps are successful and the purchasing manager approves, eventually the purchasing department gives the OK. However, before any orders can start flowing, the new vendor needs to be set up in SAP. This is no small task as a purchasing employee now has to reenter all of that information that has been collected into the none too friendly purchasing module of SAP.

Not a simple process for sure.

Now imagine the process happening using paper forms, email, spreadsheets, and phone calls. Painful does not begin to describe the process! But if there are no significant problems, the new vendor will be ready to start providing supplies or services within **3 to 4 weeks**.

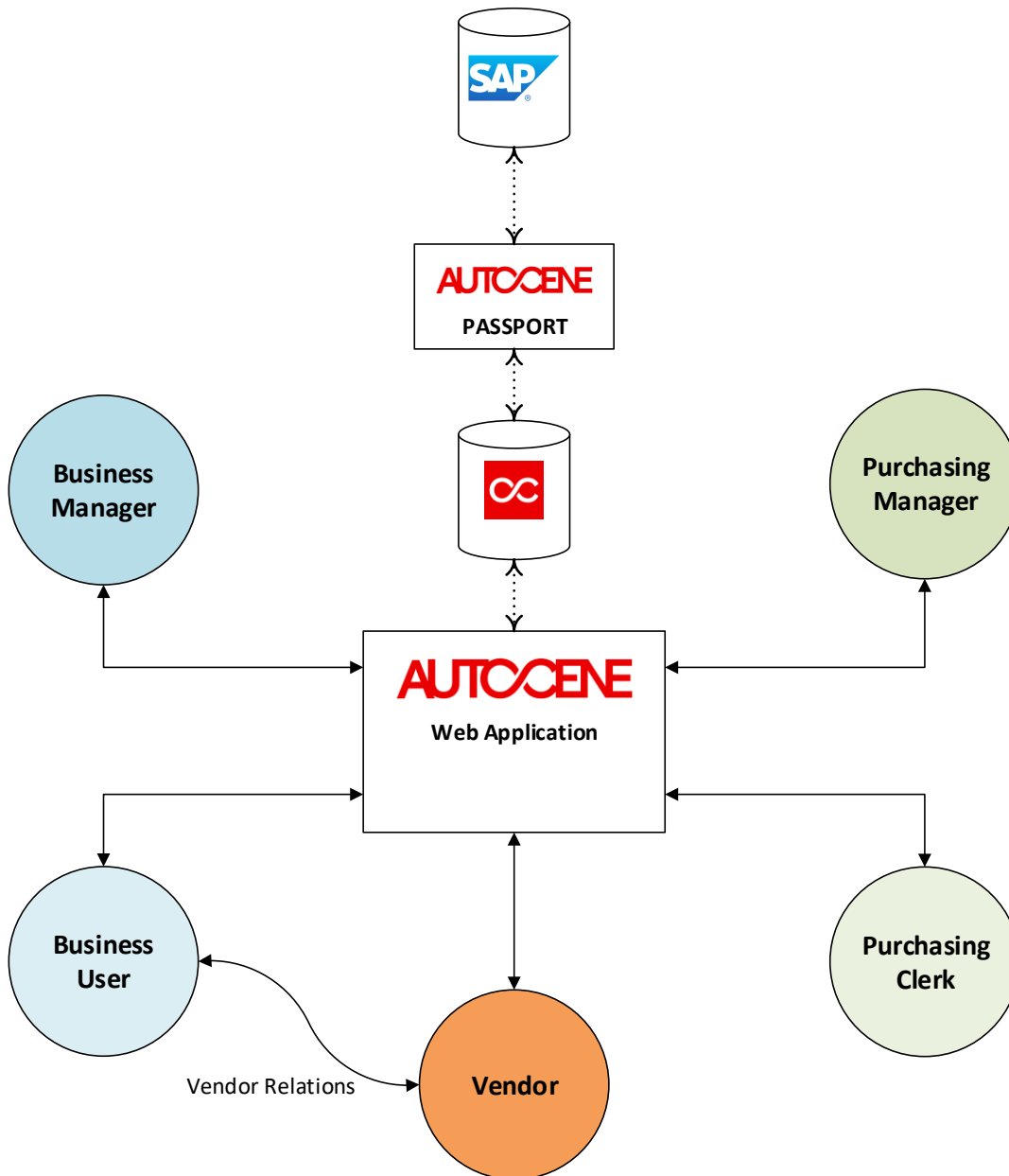
Process Before Implementation of Autocene



- Several communications interface
 - Can result to buried e-mails, missing records of information exchange
- Routing of information is not automatic
 - Can lead to information getting to the incorrect person
- No structured template for information collection
 - Can lead to a lot of back and forth between different parties to collect all the necessary information

Reengineering the Vendor Onboarding Process with Autocene

Automating the process using Autocene allows eliminating several steps in the process and exponentially reduces the time required to get the new vendor live in the system. Let's see how the process works with Autocene.



- One interface
- All communications and metadata are automatically saved in the Autocene database for reporting and integration with other systems
- Records of communication are always available and easy to find through the web application
 - No more buried e-mails
- Routing of information exchange is automated
- Validations on information exchange are implemented to minimize the amount of back and forth between interested parties
- Notifications to interested parties are automatically sent out as part of the workflow

After identifying the potential new vendor, the business user opens the Autocene application, selects the vendor's region and enters some basic vendor information along with attaching business case document of the reasons this new vendor is needed by the department.

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Automation: New Vendor Creation (SAP)

New Vendor Request

Select Country
United States

Vendor Information

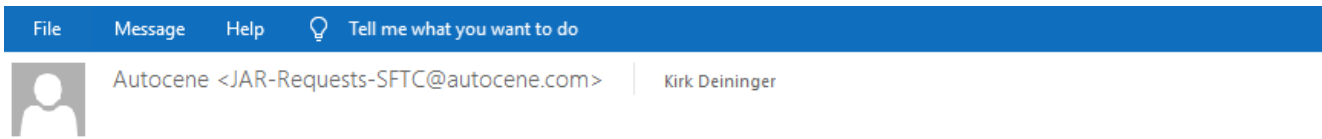
Name SUPPLIER XYZ, INC.	Email Sales@xyz.com	Phone Number 1234
Fax Number	Address W Main Street Chicago IL 61006	Account Group VEN1
Company Code 0020	Purchasing Organization CENT	Goods Or Services Goods Services

Submit Save as draft Cancel

Add attachment

+ Add attachment

The request is then automatically forwarded to the department's manager who receives an email notification that contains the basic information and attached business case document. The manager follows the link that takes them to their personalized dashboard where they can take action.



[Click here to take action](#)

Workflow state: Initial state

New Vendor Request

Select Country

United States ▼

Vendor Information

Name <input type="text" value="SUPPLIER XYZ, INC."/>	Email <input type="text" value="Sales@xyz.com"/>	Phone Number <input type="text" value="1234"/>
Fax Number <input type="text"/>	Address <input type="text" value="W Main Street"/> <input type="text" value="Chicago"/> <input type="text" value="IL"/> <input type="text" value="61006"/>	Account Group <input type="text" value="VEN1"/> ▼
Company Code <input type="text" value="0020"/> ▼	Purchasing Organization <input type="text" value="CENT"/> ▼	Goods Or Services <input type="text" value="Goods"/> ▼

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⚡ **Actions**

New Vendor Creation (SAP)

General Info

Additional Info

Take Action

Sent by
kdeininger@autocene.com

Automation Subject

Pending for
less than 1 hour

New Vendor Creation (SAP)

General Info

Additional Info

Take Action

Sent by
kdeininger@autocene.com

Automation Subject

Pending for
less than 1 hour

New Vendor Creation (SAP)

General Info

Additional Info

Take Action

Sent by
kdeininger@autocene.com

Automation Subject

Pending for
19 hours

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If approved by the department's manager, the vendor then receives an email with a link to complete the additional information needed by the purchasing department.

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Vendor Information

Material Groups

Primary Mat Group Secondary Mat Group

Tax Documentation

Tax Number SIN TIN Tax Withholding Code

Payment Information

Payment Terms Payment Methods Order Currency

Inco Terms Additional Inco Terms Recon Account

R-FB1 R 510050

Sort Key Cash Management Group Account Memo

R - 001 R - 01

Prev Account Number (Eclipse Row ID)

Clerk's Name Clerk's E-mail Address Clerk's Fax Number Clerk's Phone Number

Bank Information

(Domestic/Beneficiary)

Name Branch Region

Address Street or PO Box Country Bank Key

City State Zip or Postal

Bank Account Reference Data Collection Authorization in SAP (Autodebit Auth) Bank Type

1

Insert Bank Record

Once that part is complete, a notification is sent via email to the appropriate purchasing manager who can review the information. The purchasing manager will vary based on the type of goods and services to be acquired and/or geographic region.

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Automation: New Vendor Creation (SAP)

New Vendor Request

Approved

Comments

This vendor has been approved for entry into SAP.

Samuel Lincoln 2020-08-11

Signing Authority Date

Select Country

United States

Vendor Information

Material Groups

Primary Mat Group Secondary Mat Group

Primary Secondary

Tax Documentation

Tax Number SIN TIN Tax Withholding Code

CH 846151 5676766

Payment Information

Payment Terms Payment Methods Order Currency

45 days

Inco Terms Additional Inco Terms Recon Account

R-FB1 R 510050

Sort Key Cash Management Group Account Memo

R - 001 R - 01 Packaging

Here's where the real time savings happens! Using Autocene Passport, the data collected in this vendor onboarding application automatically flows into SAP where a new vendor profile is initiated in the customer's SAP ERP system.

The screenshot displays the SAP ShipERP: Create Shipment interface. At the top, there is a menu bar with 'Shipment', 'Edit', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main title is 'ShipERP: Create Shipment'. Below the title is a navigation bar with buttons for 'Execute', 'Track Shipment', 'Cancel Shipment', 'Reports', 'Change HU', 'Manual Shipment', and 'Trailer Management'. The interface is divided into several sections:

- External HU:** 4561
- Shop Rates:** A button to view shipping rates.
- HuCnt:** 1, **Pkg:** 1 of 1
- Auto Rate Shop:** **Auto Ship:**
- Sold To:** ATLANTA COMPANY
- Ship From:** ATLANTA, GA
- Ship To:** 2345 GLENLAKE PKWY, ATLANTA, GA 30328-3447, US
- Phone/Fax:** 999-999-9999 / 999-999-9999
- Customer #:** 0000003250
- Address Validation:** A button to validate the shipping address.
- Shipment:** Carrier: FedEx, Service: FedEx Ground, Ship Date: 11/15/2010
- Payment:** Pre Paid, 3P/COLL Acct: [blank], 3P/COLL Zip: [blank], 3P/COLL Country: [blank]
- Packaging:** Customer Package, 1 of 1, Weight: via HU, 0.50 LB
- Carrier Service Rates:** A table showing rates for FedEx Ground and FedEx Express Saver.

Carrier Code	Carrier Name	Carrier Service ID	Carrier Service	Carr Rate	Currency	Transit Tm	Delivery Date	Priority
FDXG	FedEx Ground	FEDEX_GROUND	FedEx Ground	6.12	USD	5.00	11/20/2010	1
FDXE	FedEx Express	FEDEX_EXPRESS_SAVER	FedEx Express Saver	14.74	USD	3.00	11/18/2010	1

All of the data and metadata (timestamps, participants, etc.) regarding the process are captured in the Autocene database for reporting & audit purposes.

A process that took 3-4 weeks is now completed in a few days, and has drastically increased the efficiency of this customers' purchasing staff!

Benefits of the Platform

Discover Autocene

Autocene provides a no-code automation platform that accelerates the creation of high-impact business applications. Many of the world's largest organizations use Autocene applications to achieve operational excellence, and streamline risk management and compliance.

Autocene gives customers the flexibility of a **No-Code** Application Development Platform, combined with the power of an Intelligent Process Automation solution. It gives enterprises the ability to rapidly deploy fully configurable applications that are capable of automating even the most complicated business processes.

Autocene applications improve productivity by automating both high value, mission critical processes and eliminating time consuming repetitive tasks. **Autocene** makes both Attended, Semi-Attended & Unattended automations easy, freeing end users and adding value to your organization's critical processes & bottom line. All with no developers needed!

Autocene Passport bidirectionally integrates data with any of your existing Enterprise applications & databases (On-Premise or Cloud Hosted). Data can seamlessly travel to and from multiple disparate systems and/or **Autocene applications**, monitoring databases and automating integrations, centralizing data for end users & eliminating time-consuming manual data entry.

Autocene Atlas is our patented AI-based Natural Language processing solution. Atlas provides content processing, context matching & role assignment capabilities. **Autocene Atlas** takes unstructured text from emails, text messages, documents & voice messages, transforming it into structured data used to initiate your business processes. This eliminates time-consuming manual entry and reduces human error.