



# Retiring the Swivel Chair with Procurement Gateway

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SAPinsider  
Las Vegas

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**2023**

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## In This Session

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We found many mid-market companies are still reliant on manual processes to manage procurement, including paper, email and excel.

Our vision is to elevate end-user productivity and ease-of-use to solve manual procurement problems.

We saw considerable market demand for a consumer-grade experience coupled with a low-tech maturity threshold.

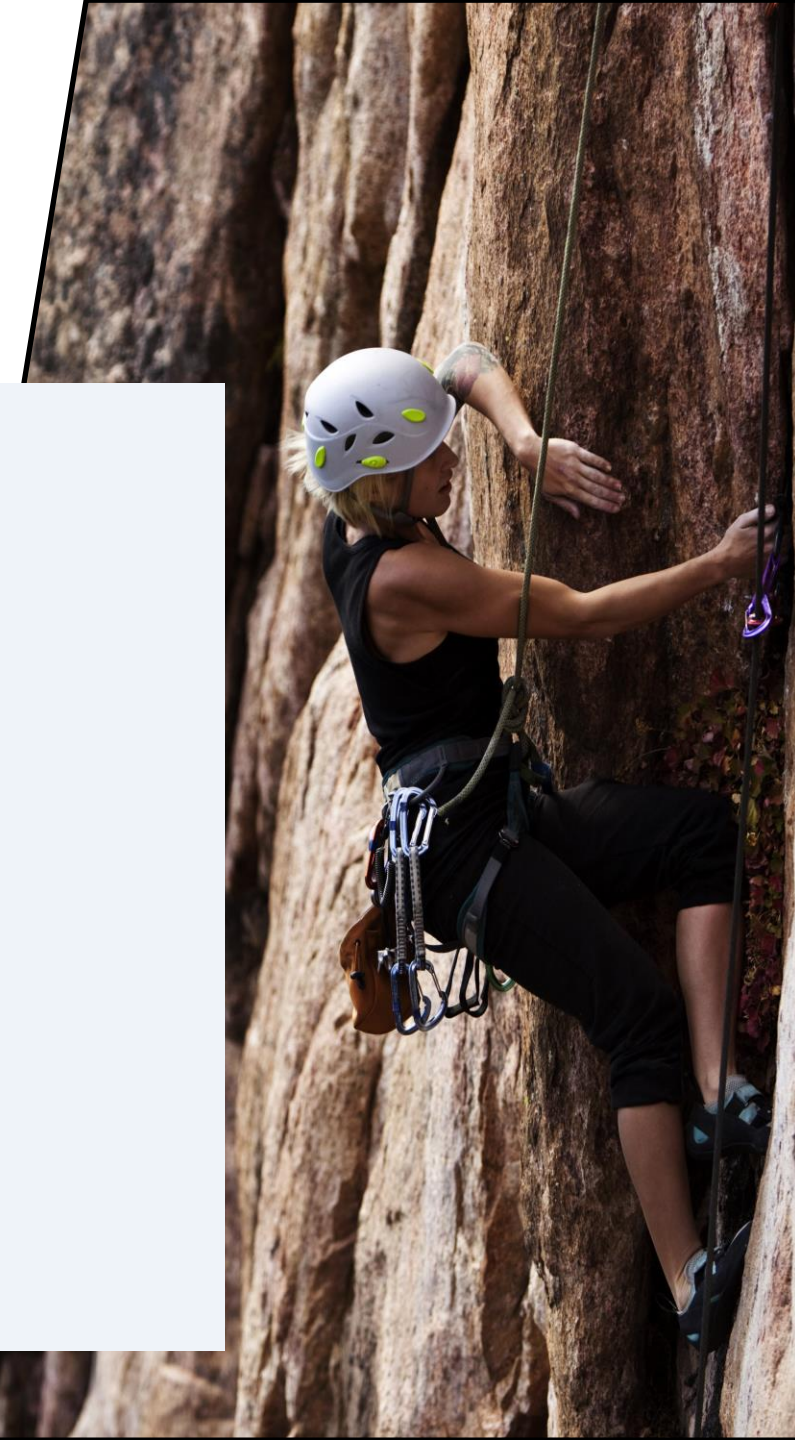
Our **Procurement Gateway** solution integrates our proprietary technology with SAP software, including SAP BTP, SAP Build Work Zone, and SAP Systems (SAP S/4HANA, SAP Ariba, and more).



## What We'll Cover

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- Customer Example
- Solution: ConvergentIS Rapid Vendor Portal
- Demo Scenario
- About ConvergentIS
- Wrap-Up



# Important notice

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# PetroChina Canada

## Procurement Gateway

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# PetroChina Canada: Who are they?

PetroChina Canada is a wholly owned subsidiary of PetroChina Company Limited (PetroChina). CNPC is China's largest oil company and the world's third largest oil company, operating 91 energy-related projects in over 35 countries and regions.

It's our job to deliver reliable, sustainable, and cost-effective power, especially through Saskatchewan's brutal winters, when demand for electricity is at its highest. As one of Canada's Best Diversity Employers, we employ more than 3,000 people and support hundreds of local businesses.

HQ:	Calgary, Alberta, Canada
Industry:	Utilities
Employees:	3000+
Revenue:	\$3.2T Globally
BTP Value Drivers:	Automation





# PetroChina Canada: Problem

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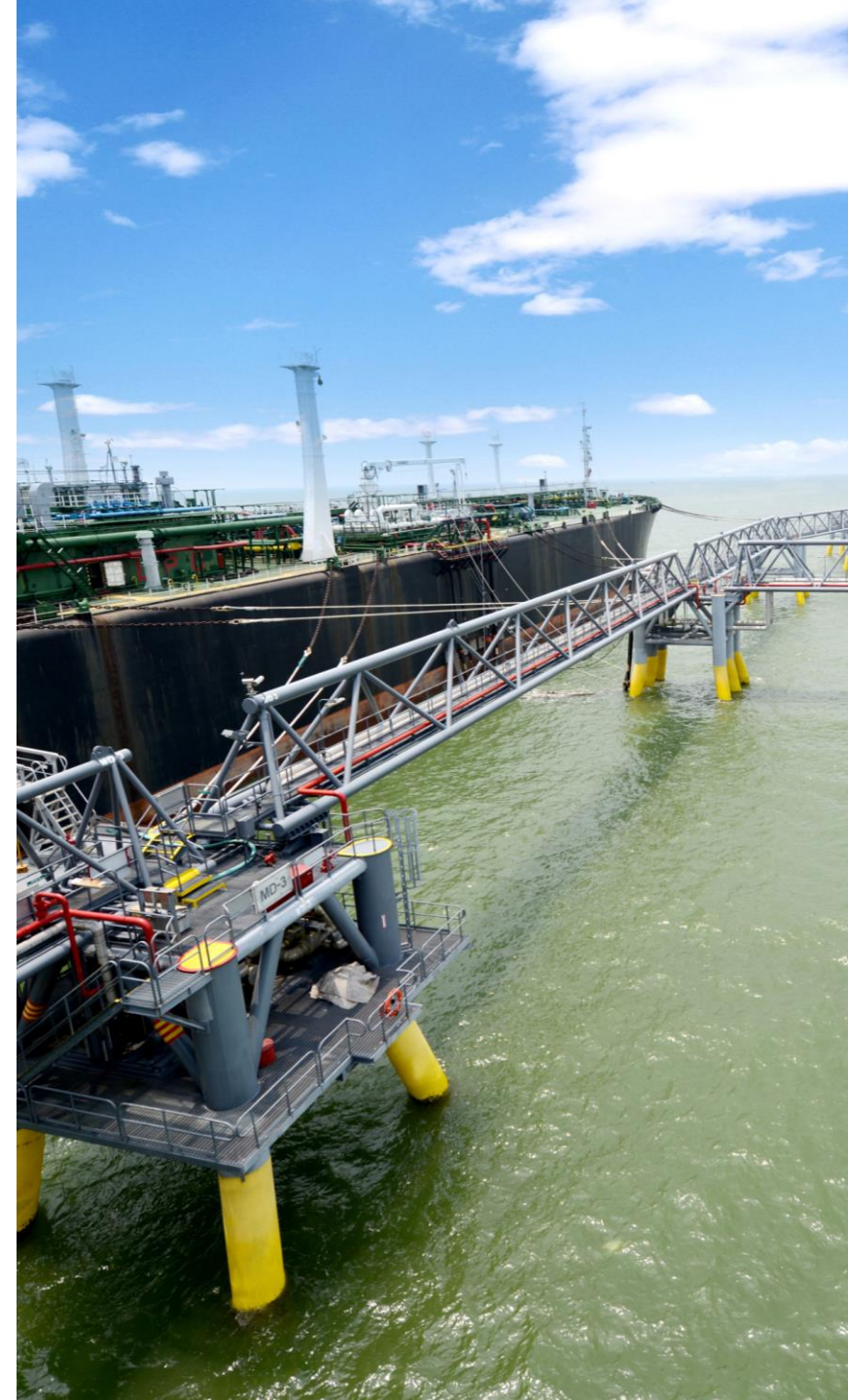
- Employees and suppliers were spending hours on mundane, repetitive work
- Manually writing or entering invoices and checking reports for status
- Their goal was to have these employees focus on business-critical initiatives
- They were looking for a tool to improve efficiency in transactions with vendors





# PetroChina Canada: Solution

- Because of our Industry Cloud solution with deep automation and intuitive user experience, they selected ConvergentIS. The purchase was justified on a business process efficiency gain with a short ROI.
- ConvergentIS Procurement Gateway eliminates manual tasks and the “swivel chair” effect using SAP BTP technology. There is now a single pane of glass for all necessary procurement data, processes, and applications.
- Workers can now easily create invoices, snap pictures, and submit in the field in real time, which reduces errors.
- Invoices automatically flow through the system for approvals and status updates.
- The portal provides transparency to suppliers and employees for all procurement processes, while its dashboard and metrics help everyone easily get the data needed to make well-informed business decisions.





**PetroChina Canada**

*“We are realizing even greater value from a pull in the business and from vendors who are eagerly adopting this easy-to-use solution. The accelerated and more transparent process improves process metrics and vendor relationships at the same time.*

*Along the way, by using the out-of-the-box solution from ConvergentIS we uncovered further opportunities to streamline our procure to pay processes.”*

**Jan Poetsch**  
**Executive Vice President**  
**PetroChina Canada**



# PetroChina Canada: Key Results

- The plan was to push this to business and vendors, however this quickly turned into a pull
- Vendors can submit service entries directly, and approvers now find all tasks and related information in one place
- This leads to front-end loaded approval processes and higher transaction speed, with more empowered employees
- For example, within the first few weeks, 74 POs were confirmed, 489 Service Entry Sheets were created, and 222 Invoices were created







# Rapid Vendor Portal

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Powered by Work Zone on BTP

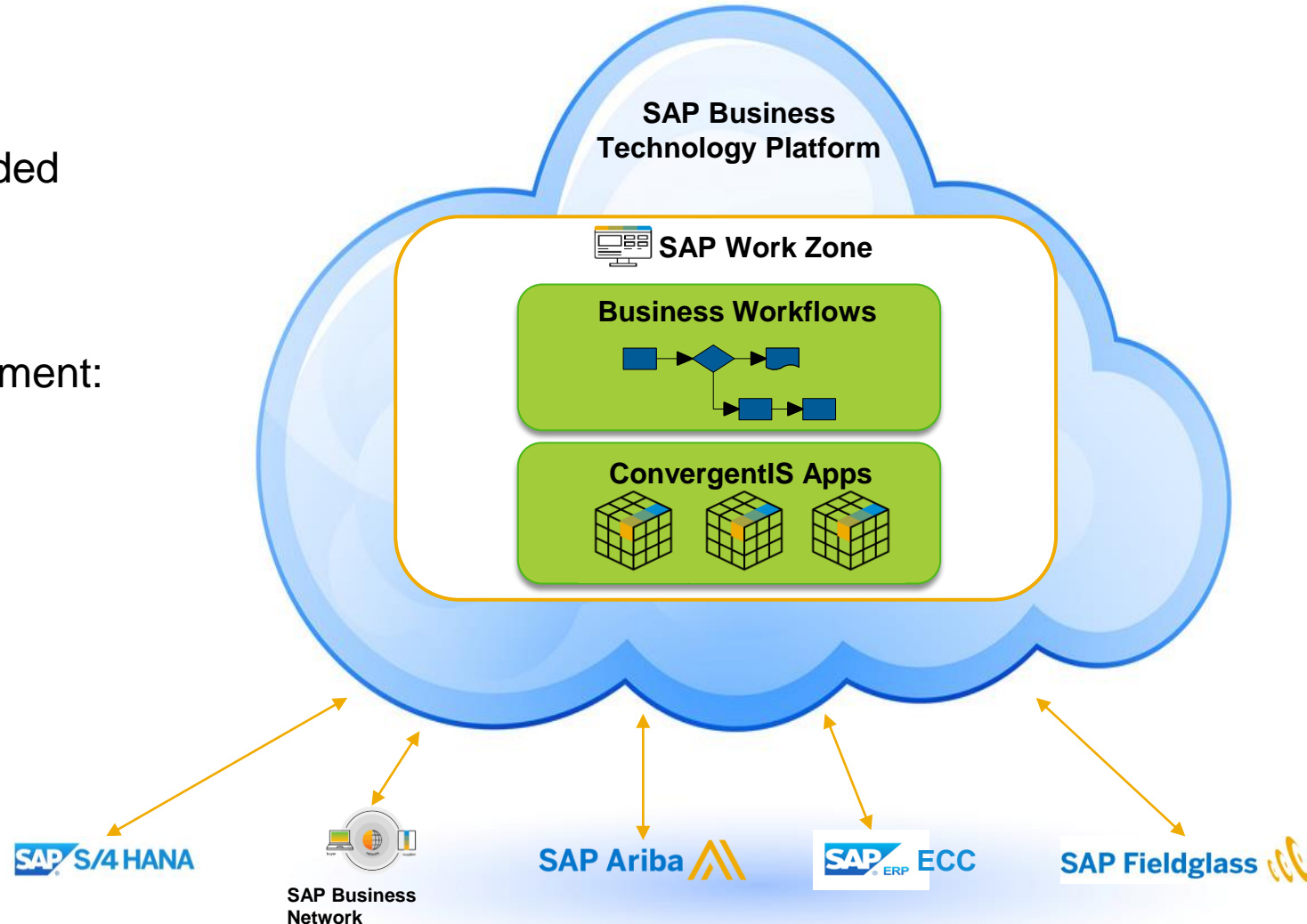
# Procurement Gateway Solution

*Easy to Buy...*

*Easy to Deploy...*

*Fast ROI...*

- Cloud solution based on:
  - Business Technology Platform
  - Work Zone
- Drive efficiencies and savings with embedded ConvergentIS functionality
  - Extends SAP ERP and ISBN functionality
- Single pane of glass for all of your procurement:
  - Data
  - Processes
  - Applications
- Real-time collaboration with:
  - Employees
  - Embedded contractors
  - External Vendors

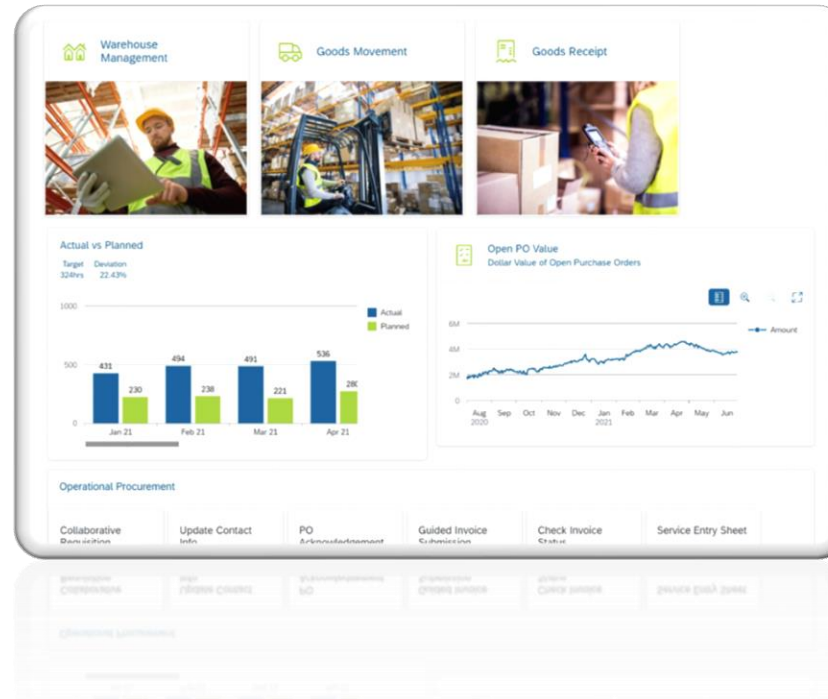


# ConvergentIS + SAP Portfolio

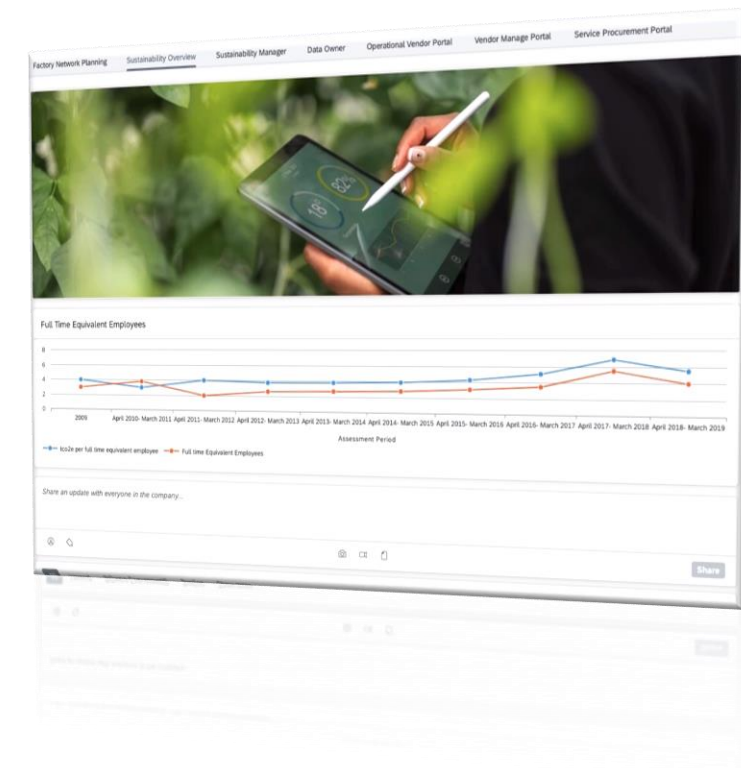
## Procurement Analytics



## Operational Procurement



## Sustainability







# Operational Procurement

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# Operational Procurement & Supply Chain

Out-of-the-box applications that provide rapid and secure access to businesses and their suppliers so that they can collaborate on core procurement and supply chain processes in real-time and view their data in an aggregated and user-friendly environment

## Governance

- Abide by and enforce the contracts reached with preferred suppliers
- Guide employees to purchase from:
  - Preferred suppliers
  - Select approved items or services
  - Buy at approved prices or rates.
- Customers have saved \$Millions through enforcement of preferred vendors, items and prices
- Ex: Lam Research saved \$8.1M on sheet metal purchases



## Efficiency

- End-to-end processes will be as automated and touchless as possible
- Employees will manage by exception
- Recommend the use of Evaluated Receipt Settlement
- Customers can experience 6X+ improvements in process efficiencies
- Ex: Calian achieved 7X reduction in paperwork through automation, electronic submissions and approvals



## Adoption

- Employees directed through the procurement processes using a guided approach
- Utilizes simple questions to gently steer them one step at a time
- Customers have migrated hundreds of employees onto new processes and software in weeks not months and with little to no training
- Ex: Region of Halton migrated 500+ employees in 3-4 weeks with little to no retraining



## Business Goals: Reduce Total Costs and Processes

Paper Invoices	Invoice Capture (Non-PO Invoices)	Advanced Invoice Processing (PO-based Invoices)	Invoice Elimination
	Scan-based	Touchless Invoice Automation	Evaluated Receipt Settlement (ERS)
		Design Thinking	
		Fiori & Mobile	
		Guided Processes (low-code / no-code)	

Processing Cost

6X

4X

2X

1X

Invoices per AP FTE

6,892

9,586

20,299

20,299

AP Cost per Invoice

\$6.39

\$3.93

\$2.13

\$1.15

Rapid Vendor Portal from ConvergentIS helps customers drive costs down and efficiency up



# Highly User Friendly – Single Pane of Glass



Procurement Apps

Analytics

Procurement Apps

Ariba & Fieldglass Integration

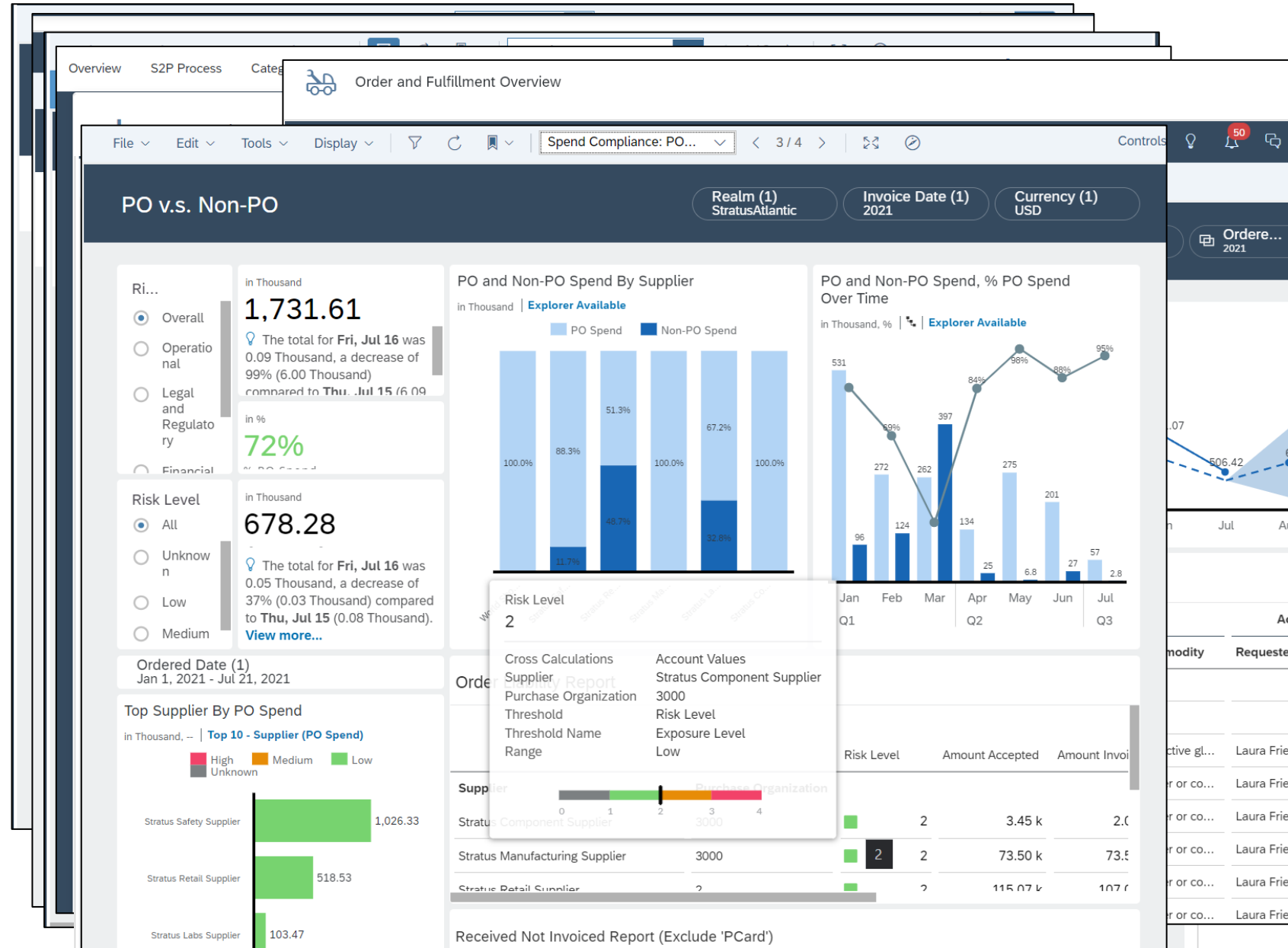
A photograph of a person standing in a server room, looking at a rack of servers. The room is dimly lit with blue and orange lights. The person is wearing a plaid shirt and dark pants. The server racks are filled with equipment and have blue lights. The background shows a glass door and a hallway.

# Procurement Analytics

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# Procurement Analytics Integration with NexGen UX

- Prebuilt and interactive graphs that display information from all of SAP's procurement portfolio:
  - Ariba
  - Fieldglass
  - S/4HANA
  - IBP
- Immediate value for customers
- Organized into seven categories:
  - Procurement Overview
  - Supplier Category Management
  - Contract Management
  - Commodity Buyer
  - Payables Management
  - Trading Partner
  - Contingent Workforce
- Partnership with Dan Pouliot, GVP ISBN Presales (NexGen UX)





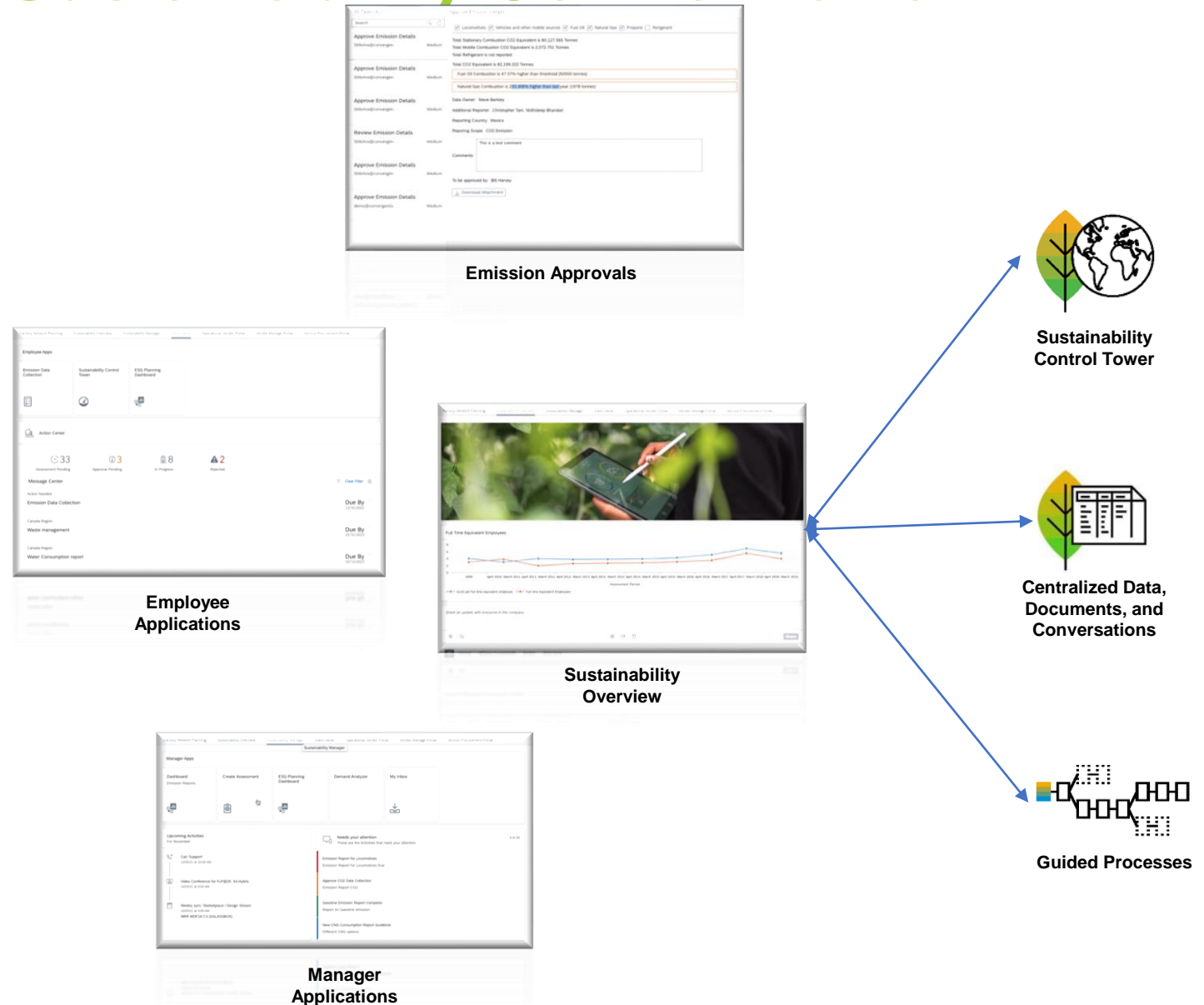


# Sustainability

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# Sustainability with Sustainability Control Tower

- Brings together information from across your company and from your suppliers
- Integrates with SAP's Sustainability Control Tower to deliver prebuilt reports on a company's:
  - Environmental metrics
  - Sustainability metrics
  - Government mandate performance
- Guided processes are used to assist employees in the reporting of environmental and sustainability data
- Partnership with Sharon Om, VP BTP Sustainability







# Demo

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# Demo Background – Energy Company

- Oil & Gas pipeline company
- Procurement processes either too complex or non-existent – either way, few employees follow the procurement rules
  - Lots of maverick spend
  - Cost overruns are common because of the lack of budgetary controls
- Oftentimes, a service or part is ordered without a PO and an invoice simply arrives
  - Only then is the approver for the invoice found, the invoice approved, and a PO created
  - Too often, the price is above market rate
  - Lack of budgeting and record-keeping means that double-payments or fraud happen
- Too many suppliers are being used to deliver almost identical services or parts
  - Service rates vary significantly
  - Part prices vary significantly



# Demo Background – VP Procurement

- Jane the VP of Procurement has promised her CEO to create 20% savings in pipeline maintenance procurement
  - Her end-of-year bonus depends on delivering those 20% in savings
- She has already reduced the number of suppliers and negotiated volume discounts with:
  - Pipeline Services – 20% rate savings for pipeline repair
  - Pump Manufacturer – 20% savings on each Pipeline Pump
- Both the Pipeline Services and the Pump Manufacturer are entered into the SAP ERP Vendor Master
  - The negotiated Pipeline Services rates are entered into the Services Master
  - The SAP ERP is configured to punch-out to the Pump Manufacturer's catalog
- Now Jane needs to ensure the following:
  - Stay up-to-date on her progress using analytics for procurement and sustainability
  - Make sure employees follow the procurement process and only purchase from preferred vendors and services
  - Integrate with budgets (funds availability check)
  - Improve approval times
  - Allow mobile approvals
- So she turns to ConvergentIS Rapid Vendor Portal



# Analytics & Sustainability

- First, Jane will check on the status and performance of all aspects of procurement and supply chain across
  - Ariba
  - Fieldglass
  - S/4HANA
  - IBP
- She will also check the status of the company's sustainability initiative
  - Across the company
  - Across the suppliers

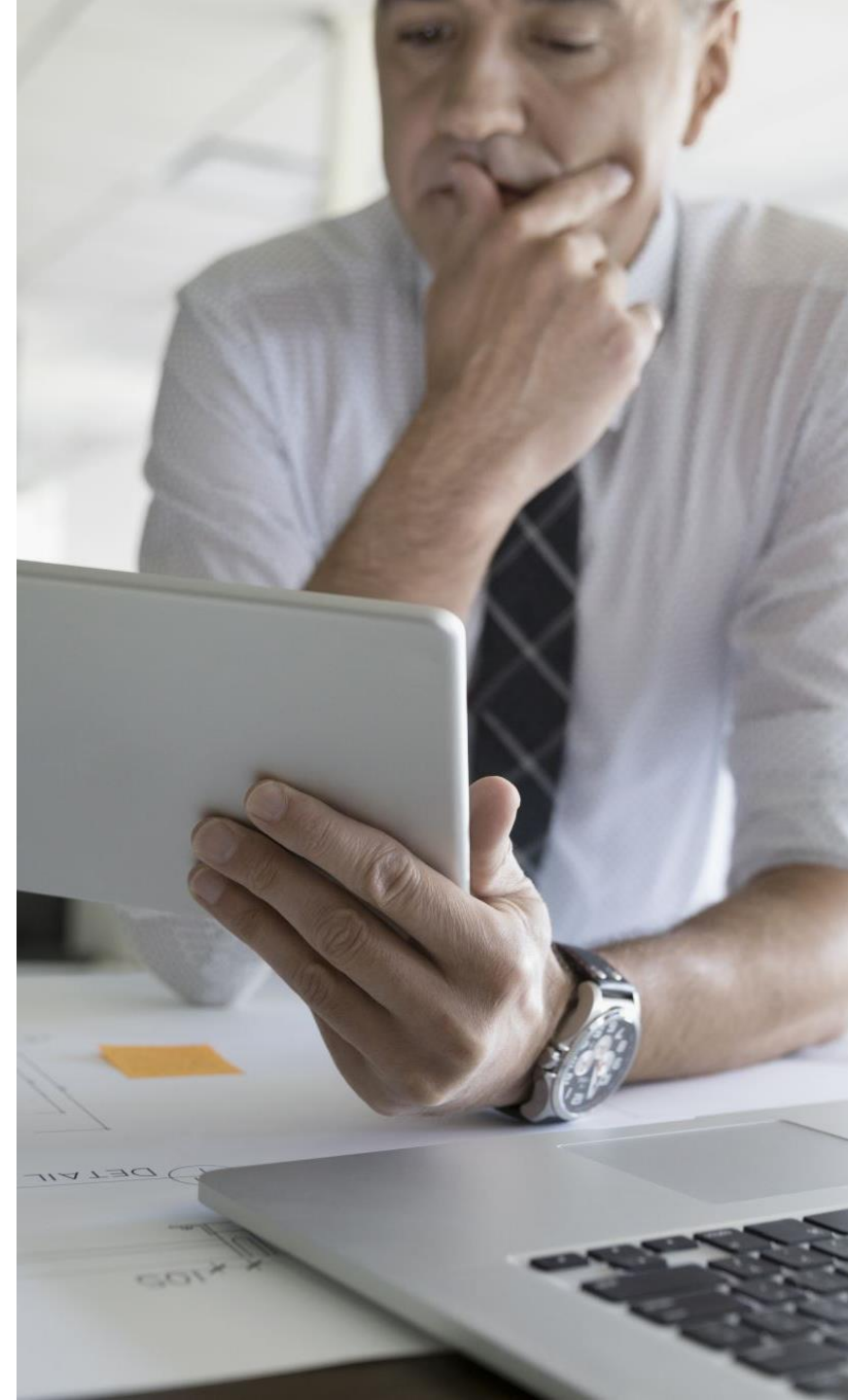






# Follow the procurement process...

- Starting with the ConvergentIS Simplified Requisitioning
- Enforce governance by guiding employees through the purchase requisition process
- Pick the right material
  - Show picking the right pump supplier from the vendor master
  - Show picking the right Pipeline Pump part from punch-out catalog
- Pick the right service
  - Show picking the right pipeline service supplier from the vendor master
  - Show picking the right service and rate from the services master

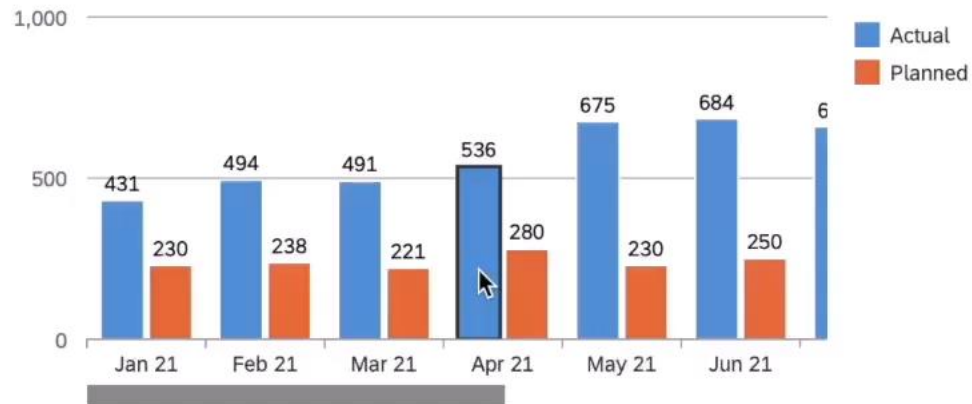


# Welcome, partner.

**Convergentis**  
**VENDOR PORTAL**

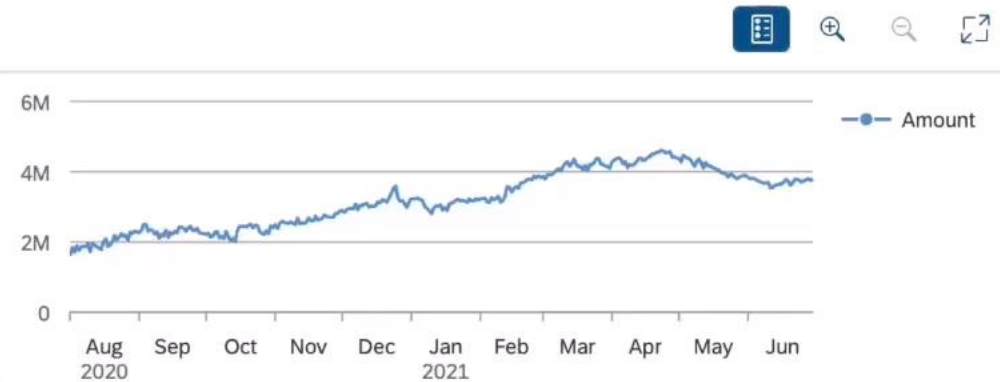
## Actual vs Planned hours

Target    Deviation  
324hrs    22.43%



## Open PO Value

Dollar Value of Open Purchase Orders





# Fast mobile approvals...

- Show PR approval arriving in MyInbox
- Approve the PR from a mobile device
- Next: In the background, a PO is created



# PO Management and Confirmation

- A PO is sent to the suppliers
- Using the ConvergentIS PO Confirmation app, the suppliers acknowledge and confirm the PO
  - Show how individual line items can be confirmed, denied, or changed
- Next: In the background, the pump is shipped and the pipeline service is started

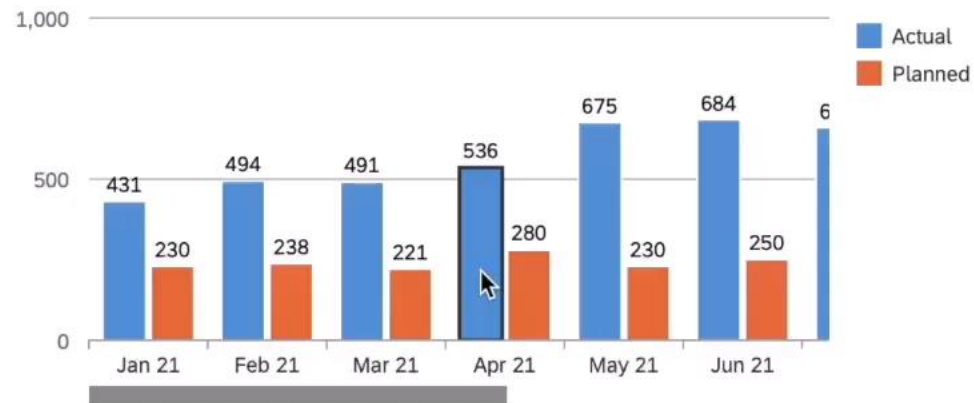


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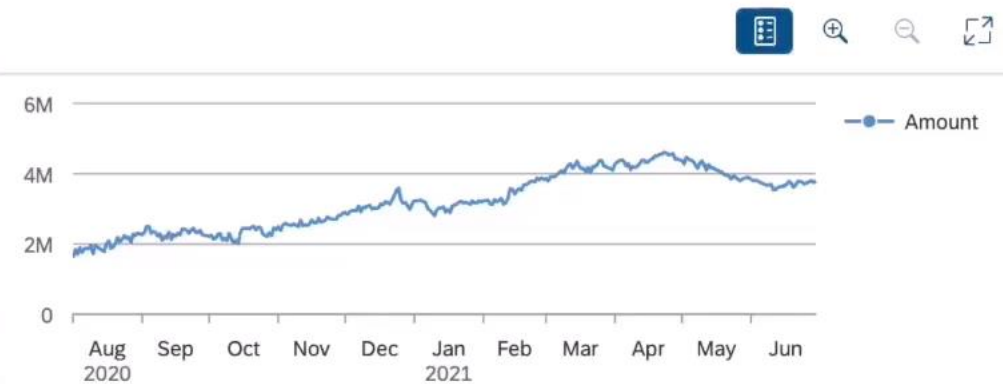
## Actual vs Planned hours

Target Deviation  
324hrs 22.43%



## Open PO Value

Dollar Value of Open Purchase Orders





# Create SES in real-time...

- Pipeline service worker completes service
- Normally, he would need to go back to the office for 1-2 hours at the end of the day to input the service details into the computer
- Now he can create the SES directly into his laptop or mobile device when and where he does the work
- The CIS SES app makes sure that he stays within budget at the negotiated rate





[Navigate to Home Page](#)

# Welcome, partner.

Convergentis  
VENDOR PORTAL



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## Vendor Collaboration Documents



SCT\_installation\_instructions.pdf

Nidhideep Bhandari · about 3 months ago

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Receipt for VM Portal.jpg

Nidhideep Bhandari · about 4 months ago

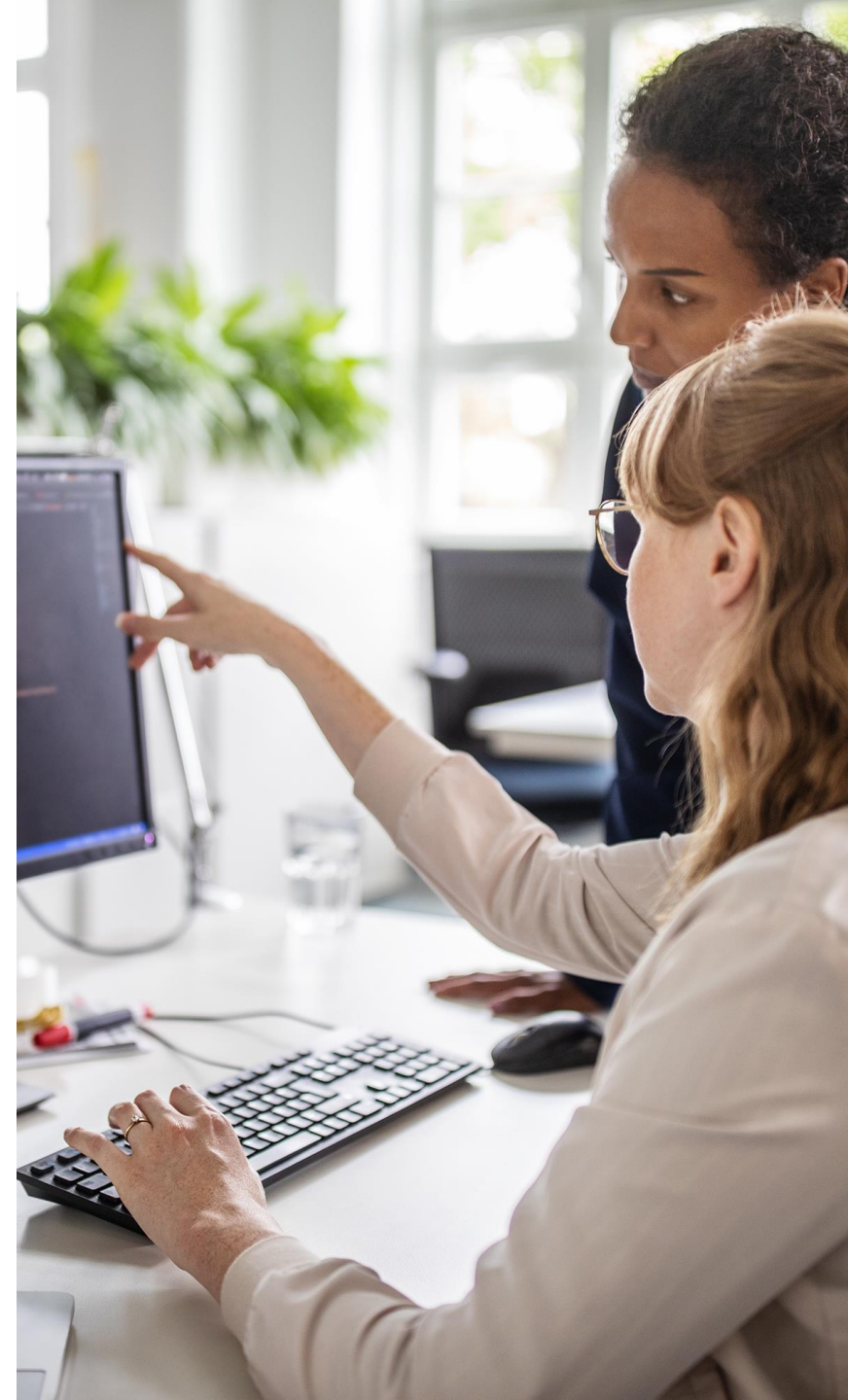


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# Efficient Invoice Management...

- The Pipeline Service SES arrives at the company
- The SES is within budget, uses the correct rate, and delivers the agreed-upon service – It is approved
- The supplier insists on using the full invoice process
  - Using the CIS Invoice Management app, the supplier flips the SES into an invoice and sends it to the buyer
- The buyer receives the invoice
  - It matches the SES and the PO – A three-way match!
  - A payment is automatically scheduled on the payment terms to the supplier for the service



# Welcome, partner.

Convergentis  
VENDOR PORTAL



Placeholder for name and title



Placeholder for name and title

## Vendor Collaboration Documents



SCT\_installation\_instructions.pdf

Nidhideep Bhandari · about 3 months ago

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Receipt for VM Portal.jpg

Nidhideep Bhandari · about 4 months ago



Placeholder for name and title



# Buy, Receive, Pay off of your own records...

- The Pipeline Pump arrives at the company
- A warehouse worker scans the pump as it arrives and automatically updates the SAP ERP
  - The received pump matches the pipeline part that was purchased using the original PR and PO - A two-way match!
- The supplier has agreed to use Evaluated Receipt Settlement
  - A payment is automatically scheduled on the payment terms to the supplier for the pump
- As a result, the company saves even more money by avoiding the duplicative invoicing process





# Welcome, partner.

Convergentis  
VENDOR PORTAL



Placeholder for a name or title



Placeholder for a name or title

## Vendor Collaboration Documents



SCT\_installation\_instructions.pdf

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Receipt for VM Portal.jpg

Nidhideep Bhandari · about 4 months ago



Placeholder for a name or title

# End of the year...

- Jane the VP of Procurement has achieved her 20% savings in pipeline maintenance procurement
  - She receives her end-of-year bonus!
- The Rapid Vendor Portal from ConvergentIS has:
  - Help Jane to convince hundreds of employees to use the procurement process
    - As a result, budgets are actually being kept!
  - Enforced selection of the right vendors, services, and parts – as a result:
    - Instead of paying above-market-rate prices, the company is now paying below-market-rate
    - Double-payments and fraudulent payments have disappeared
  - Made the procurement process so efficient that:
    - She can retarget several procurement and accounts payable employees to more strategic tasks
    - Suppliers are always getting paid on time and the number of disputes has dropped dramatically







# Wrap up

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About ConvergentIS



# About ConvergentIS

Headquartered in Calgary, Alberta

SAP Design, Build, Sell, and Service Partner

Specializing in Procurement, Supply Chain and ERP Transformations

Extensive Business Strategy and Execution Consulting experience and capability

We have:

- Completed 220+ Projects to date,
- 20+ Packaged App Solutions, 8 of which are available on the [SAP Store](#),
- 50,000+ Users on our apps and growing



Spotlight Status



# SAP AppHaus Innovation Award



## AppHaus Network Innovation Awards 2021 Winner – Best Scaling

### Project Description

ConvergentIS crafted a solution to combat FortisAlberta's current combination of end-of-life third-party technology and paper pick lists.

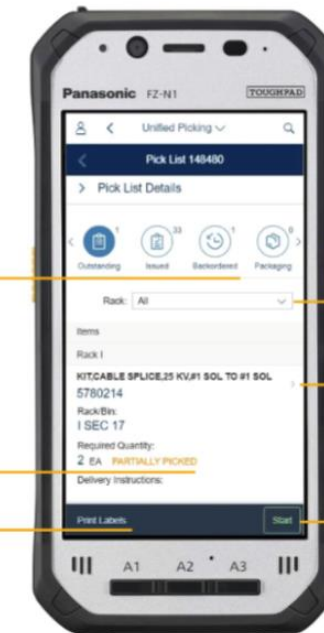
They replaced paper pick lists with mobile applications accessed through handheld devices. An application was also created for admins to support the new paperless process, and manual administrative tasks replaced with automated business rules.

Lastly, paper manifests were replaced with self-serve applications for field operators. The solution enables warehouse operators to issue, backorder, and final issue directly from handhelds and to see real-time stock levels and picking progress.

Keep track of picking progress within a pick list

Temporarily save partial picks without issuing

Print shipping labels



Filter items by picking location

Click on an item to see more details

Assign yourself to pick list to show others where you are working

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15

# Where to Find More Information



Available on  
**SAP Store**

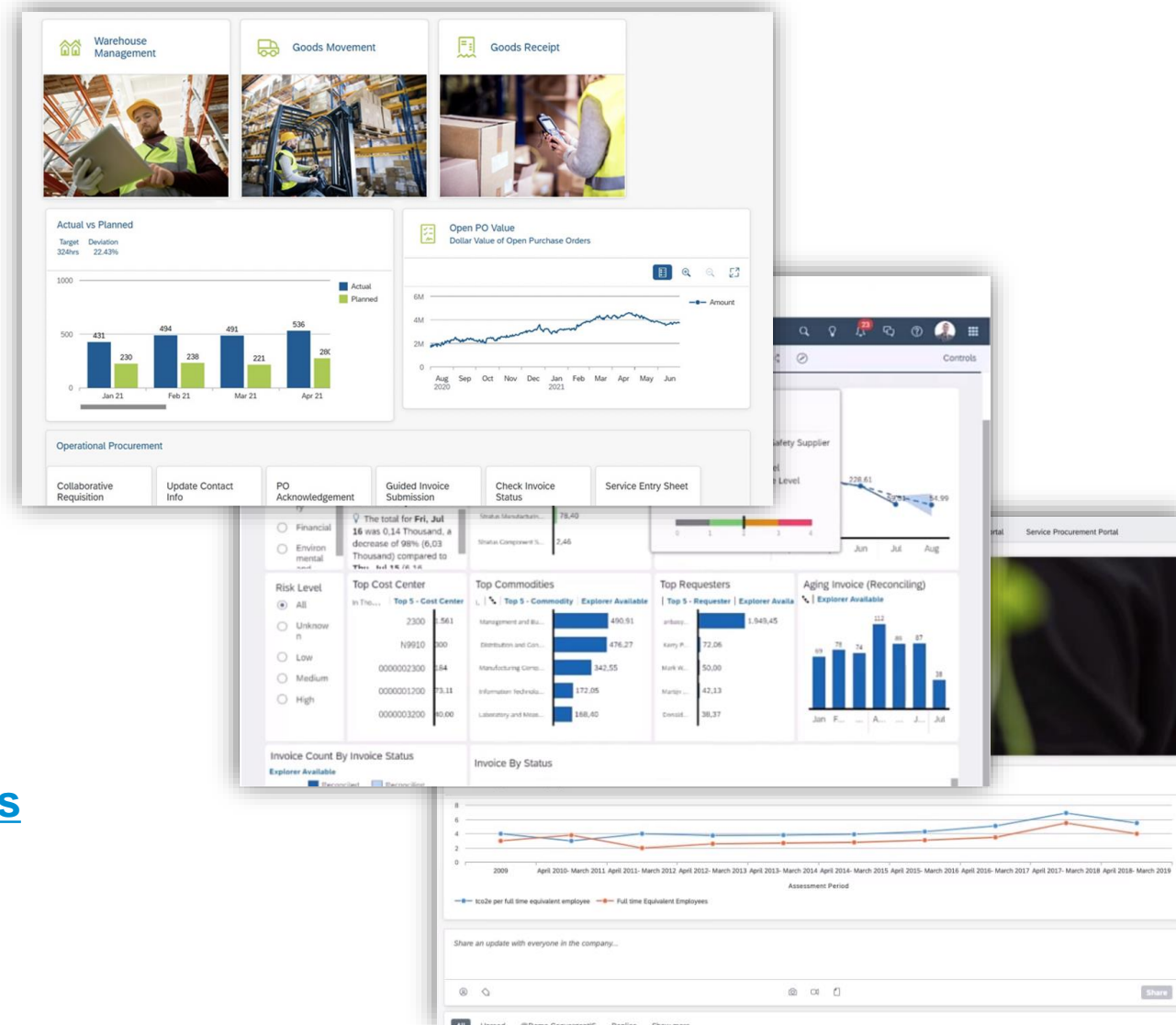
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[Available as part of Industry Cloud](#)

See additional information on:

- [www.convergentis.com](http://www.convergentis.com)
- [linkedin.com/company/convergentis](https://linkedin.com/company/convergentis)





## Key Points to Take Home

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- Beautifully Simple Solutions
- Guided processes key to Adoption – hundred migrated in weeks not months
- Simple questions help enforce governance – enforcing supplier contracts helped to save millions
- End-to-end efficiency – manage by exception for 6X efficiency and savings gains
- Procurement Analytics to keep track of your status and efficiency gains
- Simple Sustainability to make achieving goals straightforward



# Thank you.

## More questions? Contact us!

Contact information:

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