



Z Energy Pumping with ApprovalPlus



Key Benefits...

- Fast implementation
- Integrated seamlessly with JD Edwards ERP
- Streamlines Procure to Pay processes across multiple business units
- Intuitive to use, leading to fast staff uptake
- Connect from anywhere
- Delegated list of approvers within ApprovalPlus
- Scanned invoices makes it easy to retrieve past copies
- Trusted relationship with Fusion5

In 2010 Infratil and the New Zealand Superannuation Fund purchased Shell New Zealand's downstream business. The operating company was renamed Greenstone Energy. In 2011 after surveying 17,000 New Zealanders, the company decided to rename itself Z Energy and brand its service stations simply as Z.

Z Energy owns and manages:

- a 17.1 per cent stake in the New Zealand Refining Company
- a 25 per cent stake in Loyalty New Zealand who run Fly Buys
- over 220 service stations
- about 100 truck stops
- pipelines, terminals and bulk storage terminal infrastructure around the country.

Opportunity for Change

Z Energy took the opportunity to review its processes when it took over Shell. A major area of focus was around the Procure to Pay process and Purchase Order generation in particular. After a full review of the current processes, a number of key areas of improvement were identified.

Purchase Order (PO) procedures were different across all teams with business units choosing to adopt their 'own way of doing things'. For some units this meant using a combination of Access databases and physical POs to send to suppliers. For other teams it was a manual PO book and for the rest there was no such thing as a PO.

When the invoice was received there was no consistency as to whether the PO was revisited and matched to the invoice. The use of different systems compromised the audit trail and there was never an overview of the purchase commitments.

Utilising Fusion5's Range of Solutions

Fusion5 had an existing relationship with Z Energy through the 're-implementation' of their JD Edwards ERP software. During one of the meetings around the re-implementation project the Purchase process was raised. Bevan Wright, Sales

About Fusion5

Fusion5 is a professional services organisation specialising in the implementation and support of business application software across Enterprise Resource Planning, Customer Relationship Management, Human Capital Management, Enterprise Project Management and IT Service Management.

Our large team of highly qualified project managers and consultants means our track record for delivering on time, on budget projects is second to none. And our ability to support a wide range of business applications means our customers can enjoy the benefits of consolidated support through a highly committed business partnership.

www.fusion5.co.nz
www.approval-plus.com

Executive at Fusion5, demonstrated the New Zealand created and owned system ApprovalPlus as a potential solution. Z Energy's philosophy is to use out of the box solutions where possible and to select the simplest solution to meet defined business needs. ApprovalPlus fitted well with this philosophy. Nicola Hivon, Contract and Procurement Manager at Z Energy, explains the ease from implementation to uptake.

"The implementation of ApprovalPlus was very smooth; I was surprised at the ease and simplicity of the whole project. ApprovalPlus seamlessly integrated into our ERP system, JD Edwards. We were really impressed with the way that ApprovalPlus fits our Procure to Pay process."

"The uptake has been amazing, we have had numerous comments from our staff about how easy it is to use. The process is so intuitive that we didn't do any training for the approvers, we just gave them a simple cheat sheet and left them to it. Staff who prepare invoices and raise purchase orders were trained in about an hour and are able to pass on that knowledge to others."

The Results

Z Energy is a very diverse business with numerous areas including Corporate functions, Retail, Commercial and Chemicals. "ApprovalPlus works across all areas of our business. It gave us the consistency we were needing," said Nicola.

Z Energy currently has 230 employees throughout the major centres and smaller regions of New Zealand. While most staff work from the office there are a number who work from home as well as territory managers who are often on the road. ApprovalPlus is an online process that enables all of Z Energy's staff access, no matter where they are.

Another key benefit of the software was the management of delegated authorities. A list of delegated approvers can be set up in ApprovalPlus to ensure controls around purchase order and invoice approval.

"The authority is very clear; it is set up with a delegated list of approvers right in the system. There is no need to look up who the appropriate approver is as it is all there. The tracking ability is great, at any point we can see where in the process the Purchase Order or invoice is. Additionally we can trace an invoice back through the process and see who has done what" Nicola goes on to explain.

"A feature that has saved us a lot of time is that all invoices are scanned into the system. This makes it quick and easy to look up past invoices. Before we would have to hunt through folders of paper invoices to find the right one," comments Nicola. When an invoice is received at Z Energy it is scanned into ApprovalPlus. Accounts Payable then attempts to match the invoice to a PO; if successful, it is batched to JD Edwards for payment. If a match cannot be made then it is sent off to a preparer to code."

"It's been great to see how a manual process can be streamlined and automated so smoothly," concludes Nicola.