

W

Advanced SharePoint & Winshuttle Usage to Effectively Manage the Master Data Process in SAP

Blake Abbott & Dan Hunt | HollyFrontier

A stylized illustration of a tropical landscape. The foreground is a dark blue silhouette of a hillside. Several palm trees of varying heights and orientations are scattered across the hillside. The background is a light blue gradient, suggesting a clear sky. The overall aesthetic is clean and modern.

WINSHUTTLE
USER
GROUP
SAN DIEGO | 2013

Agenda

- Company Profile
- Master Data Statistics
- Where We've Been
- Where We Are Now
- Advanced Usage
- Lessons Learned
- Demo and Questions



Company Profile

HollyFrontier Corporation (NYSE: HFC)

- Independent refining and marketing company founded in 1947 and headquartered in Dallas, TX
- Own and operate five complex refineries with a total crude oil processing capacity of 443,000 bpd
- Produce gasoline, diesel fuel, jet fuel, and specialty products
- Operate in Mid-Continent, Southwest and Rocky Mountain regions
- Own 40% interest in Holly Energy Partners and 75% in UNEV Pipeline
- Ranked 143 on the Fortune 500



Master Data Statistics

- Process 80,000+ Truck and Railcar movements each month
- 300 Profit Centers
- 1,100 Cost Centers
- 5,800 Materials
- 300 Plants and Terminals
- 21,000 Vendors
- 12,000 Customers
- 3,500 Contracts

**Data Integrity Group (DIG)
has to maintain 66 tables
and transactions in order to
process all types of BOLs**

Where We've Been

Up to 2009	2011 – 2012	2013
<ul style="list-style-type: none">▶ E-mail-based with forms and documents attached▶ Inefficient and error prone▶ Multiple entry of same information▶ Unable to report metrics or turn around time▶ Evident there was no process<ul style="list-style-type: none">▪ Visibility▪ Timing▪ Priority▪ Tracking	<ul style="list-style-type: none">▶ DealPoint 1.0▶ SharePoint-based system▶ Defined processes▶ Pushed initial deal entry directly to Marketing Reps<ul style="list-style-type: none">▪ Create system buy-in▪ Eliminate errors up front	<ul style="list-style-type: none">▶ DealPoint 2.0▶ Winshuttle Usage<ul style="list-style-type: none">▪ Transaction▪ Designer▪ Query▪ MS InfoPath▶ Used for FI,CO,MM,SD▶ Use workflow for non SAP transactions also▶ Increased visibility▶ Enhanced Reporting & Error Tracking

Driving Efficiencies for Master Data Process

Where We Are Now

- Full Winshuttle utilization
- Integrated additional forms to augment Deal Capture
 - Crude Purchase
 - AR Billing Inquiry
 - Capital Project Request
- Master Data Creation (Vendors, Customers, Plants)
- Efficient Processes with Visibility and Tracking
- Significantly decreased BOL Processing Error Rate

Monthly Statistics

70,000 BOLs → 1,300 DealPoint Tickets → 3.5% Error Rate

InfoPath Forms

- Can be accessed by any user with Internet access
- Drag and drop visual layout and creation tool
- Drive consistent and efficient data at FIRST point of entry
- Significant customization possible with rules and formatting

The screenshot shows a DerbyPoint logo at the top center. Below it are several input fields and dropdown menus. On the left side, there are fields for 'Request Number', 'Sales Office' (set to 'El Dorado - ZELD'), 'Type' (set to 'Rack Sale'), and 'Our Reference'. On the right side, there are dropdowns for 'Line of Business' (set to 'PRODUCT'), 'Marketing Representative' (set to 'Mitchell, Tom'), 'Sales Group' (set to 'Product Marketing El Dorado - PME'), and 'Priority' (set to 'Normal'). A 'Due Date' field is located below the priority dropdown. At the bottom, there is a section titled 'Type of Request:' with a grid of checkboxes for 'Sales Contract Create or Δ', 'Sales Price Create or Δ', 'Loading Number/Ship-to Setup', 'Material Create or Δ', 'Purchase Contract Create', 'Purchase Price Create', and 'Other'.

The screenshot shows a 'Sales Contract Line Item Info' form with a table-like structure. The columns are: 'Crude Delivery Month', 'Year', 'Qty', 'UoM', 'BBL/Month', 'MoT', 'Plant', 'Material', and 'TSW Details'. The data entered is: February, 2013, 100, BPD, 2,800.00, PL, L100, 100198, and 1020 TRADE. Below the table, there are fields for 'Plant' (HFC STA 126 HEP ART), 'Material' (WEST TEXAS INTERMEDI), and 'TSW Details' (CHEV GS). On the right side, there are radio buttons for 'Fixed' (selected), 'Repository / Formula', and 'Formula Builder', and a 'Price' field set to 105.

Reporting

- Custom SharePoint Views
- Increased Visibility and Monitoring
- Use of Promoted Fields and Task Status

Deal Capture													
	Title	Marketing Rep	LOB	Task Status	Our Reference	Sold To Customer Name	Due Date	Sales Group	Priority	CP Rep	Link To Form	DIG Rep	DIGReviewer
Task Status : (4)													
Task Status : C&P Review (6)													
LOB : LUBES (30) (1)													
LOB : PROCESS CHEMICAL (40) (2)													
LOB : PRODUCT (15) (3)													
Task Status : DIG Review (38)													
Task Status : DIG-Update SAP (24)													
Task Status : Rejected by DIG Reviewer (3)													
Task Status : Rejected to MKTG/C&P (15)													
Task Status : Saved & Not Routed (8)													
Task Status : Tax Rejected to DIG (2)													
Task Status : Tax Review (7)													
CreateGL													
	Title	Created	Modified	Created By	Priority	Requestor	Process Status	Task Status	Link To Form				
Task Status : DIG Review (1)													
	013804	9/11/2013 4:57 PM	9/13/2013 8:59 AM	Godfrey, Josh	High	Godfrey, Josh	Active	DIG Review	http://ws.hollycorp.com/dp/_layouts/fr.sv.aspx?rid=675e2e0e-a6a1-4511-87ac-e88d0bf7bf5;81				
VendorCRE													
	Title	Created	Our Reference	Task Status	Link To Form	Created By	Sales Office	Sales Group	Priority				
Task Status : DIG Review (21)													
Task Status : DIG-Update SAP (22)													
Task Status : Rejected to Originator (4)													
Task Status : Vendor Approver Review (16)													

Reporting

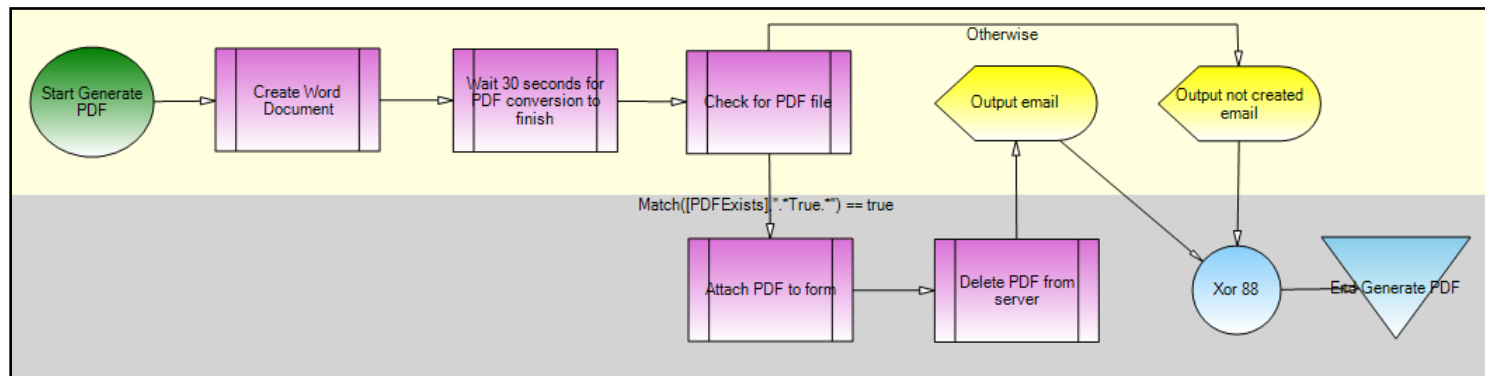
- Custom SharePoint Views
- Increased Visibility and Monitoring
- Use of Promoted Fields and Task Status

DealPoint Stats										
DealPoint 2.0 Requests										
Line of Business	Closed							Open	Avg. Turnaround (Days)	
	Jan	Feb	March	April	May	June	July		Creation to Completion	DIG Time to Complete
Crude:	82	60	52	65	73	59	56	7	49.0	N/A
Products:	704	524	616	705	716	626	639	9	2.8	1.7
Asphalt:			114	145	160	146	142	8	2.7	1.9
Lubes:					48	119	120	2	2.1	1.8
Total	786	584	782	915	997	950	957	26	2.7	

DIG Requests in DealPoint 1.0 & 2.0										
DIG Requests (1.0 & 2.0)										
Line of Business	Closed							Open	Avg. Turnaround (Days)	
	Jan	Feb	March	April	May	June	July		Creation to Completion	
Acct	186	249	225	174	193	130	136	3	2.2	
Asphalt	86	14	26	16	0	0	0	0	N/A	
Crude	8	8	1	8	2	1	2	0	0.8	
HEP	22	23	25	19	27	47	41	3	0.7	
Lubes	86	127	107	79	8	8	8	0	2	
MRO	275	210	217	235	314	315	297	0	4.2	
Other	1	27	15	7	2	3	7	0	7.6	
Total	664	658	616	538	546	504	491	6	3.4	

Form Output to PDF

- Designer Plug-In
- Creates PDF Document from InfoPath Form
- Used for Contract Creation
- Eliminates multiple manual steps



Connection to Legacy Systems

- Unix System is current Crude system of record
- Write to SQL and then TRAFXS with Designer Plug-In
- Eliminates duplicate entry
- Enables visibility and reporting


A screenshot of a legacy system interface. The top section includes a 'Lookup' button and fields for Lease (00043124), Amend (006), G/L Co (66), Div (65), and Approvals (Dept: 03/02/711). The Name field contains 'HANCOCK 19 STATE COM #3'. Below this is a 'Pricing' section with 'Price at Lease' and 'PLANSF/MD/EDQ/3.5/' fields, with a value of 76.4763. The 'Entry Date' is 10/18/12 and 'Effective Date From' is 10/01/12. There are also fields for 'Allocate' (N), 'Status' (A - Approved), and 'Pay Meth' (100% Gross Pay). The bottom section contains address and location information: Oper (026874), Trans (350501), Shpr, State (NM), County (005 - CHAVES), UL (E), Sec (19), Town (T55), Range (31E), Station (176 - HRMC TRK NORTH LOOD HILLS (CENT)), Gath, Prod (OIL), Oil Type (I), Sulphur Content (0.0000), Field (ABO), and Pool (WILDCAT).



A screenshot of a new system interface. It features a 'Lease Number' field with a search icon and a red asterisk. Below it is the 'Lease Name' field, also with a red asterisk. The 'Sub Number' is 000, 'Amend' is 000, and 'BPD' is empty. The 'Allocated' field has a dropdown menu and a red asterisk. The 'Pay Method' field has a dropdown menu and a red asterisk. The 'Transporter' field has a dropdown menu and a red asterisk. The 'County' field has a dropdown menu and a 'County #' field. The 'UL' field has a dropdown menu, and 'Sec', 'Rng', and 'Tshp' fields are also present. The 'Station' field has a dropdown menu and a 'Station #' field. The 'Product Description' field has a dropdown menu. The 'Product' field has a dropdown menu and an 'Oil type' field. The 'Field Name' field has a dropdown menu and a 'Field' field. The 'Pool Name' field has a dropdown menu and a 'Pool' field.

Questions

DealPoint 2.0



<u>DEAL CAPTURE FORMS</u>	<u>GENERAL MASTER DATA FORMS</u>	<u>OTHER MASTER DATA REQUESTS</u>	<u>AR BILLING FORMS</u>
Deal Capture	Cost Center Request	Block Ship-To	AR Billing Inquiry
Crude Deal Capture	General Ledger Request	Partner Ship-To	
Lease Data Form	Profit Center Request		
New Plant Request			
Vendor Request			Other DIG Request

Contact Information

Blake Abbott

Senior Manager, Business Process Management
Blake.Abbott@HollyFrontier.com

Dan Hunt

Business Process Project Lead
Daniel.Hunt@HollyFrontier.com

