Best Practices – Purchasing

David Kramer

8/27/2024

Presented by

ABS WAVESIGHT™

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David Kramer

Senior Technical Advisor

David has been with ABS since 2018. He has worked in Ship Management for more than 25 years.

David's experience is Technical and Operational Ship Management.

He is a Naval Architect, Mechanical Engineer, Business Manager, and was a Chief Engineer.

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Agenda

- Changing Environment
- Continuous Improvement
- Best Practice
- Features
- Poll, Question & Answer

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Nautical System Enterprise (NSE)

Changing Environment

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Industry Influence

- Environmental aspects
- Hazardous Material, identification, and control
- Digitization
- Use one software
- How is purchasing changing?
- How do we stay current in PURCHASING?
  - Has NSE moved
  - Do we move
  - Contracts
  - Digitization
- Continuous cost pressure

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Has PURCHASING evolved over the past decade?

- Digital Transformation
  - eProc
  - Automation
- Data driven decision making
- Sustainability, Ethical Sourcing
- Environment
- Social Responsibility
- Supply Chain Resilience
- Customer centric approaches

- Objective
  - More efficient
  - Visibility
  - Inventory control
  - Cost-effective
    - Cost reduction

Continuous Improvement

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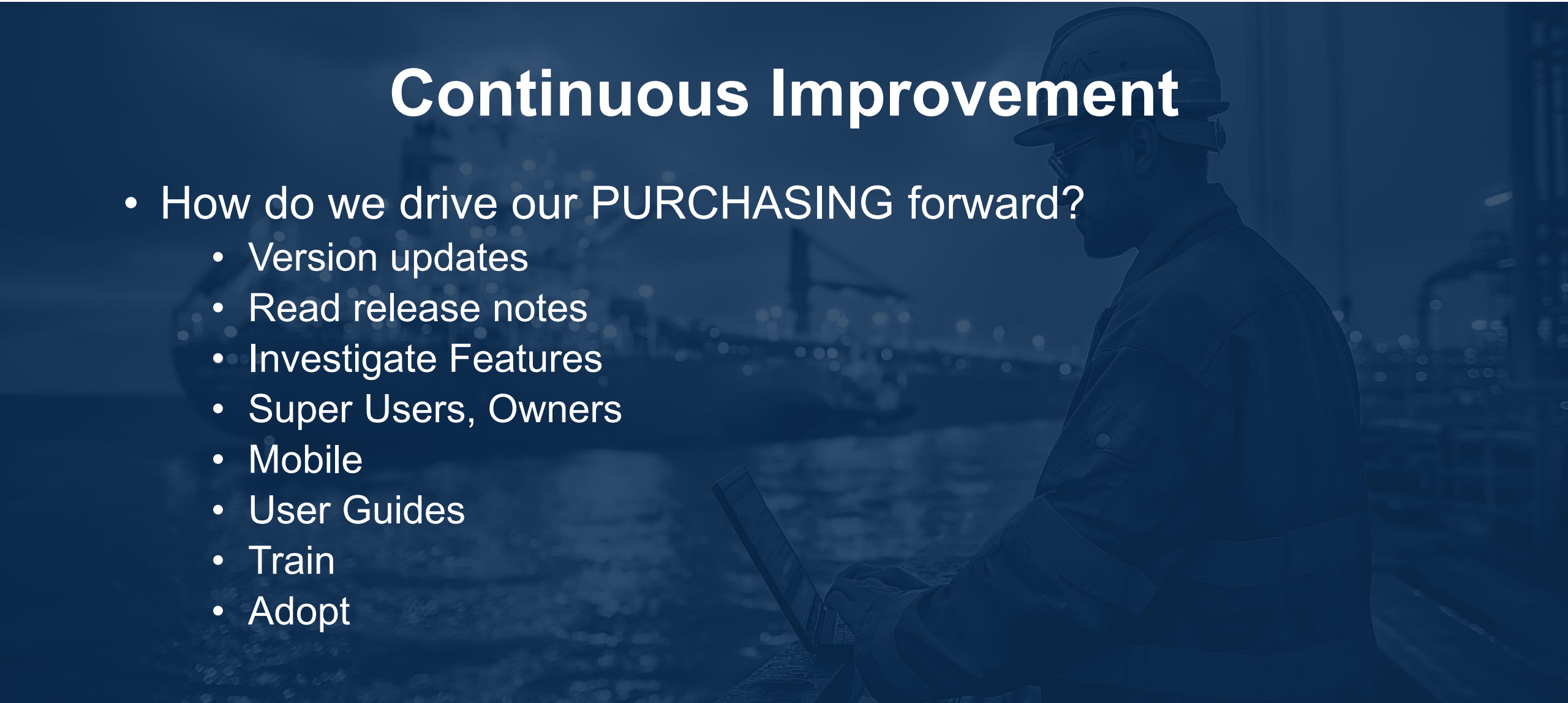
Continuous Improvement

Has NSE evolved over the past year / years?

Continuous Improvement

- How do we drive our PURCHASING forward?
  - Version updates
  - Read release notes
  - Investigate Features
  - Super Users, Owners
  - Mobile
  - User Guides
  - Train
  - Adopt



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AMERICA'S CUP SAILING

Features

- Materials Purchasing
- Service Purchasing
- Approval Plans
- Transfer Order
- Landing Orders
- Shipping Instructions
- Shipping Manifest
- Add Parts to Hierarchy
- Inventory
- Accounts
- Budgets

- Enhanced
  - Accounts
  - eProcurement
  - Inventory of Hazardous Materials (IHM)
  - Requisition
    - Required fields
  - Approval Plans
  - Revision views
- New
  - Service Contracts

Workspaces / Dashboards / Graphics

- Concept
- Underutilized
- Not set up by Users

- New
  - I am the Approver
  - Budget vs Committed
  - PO by Classification
  - Parts Below Policy Level

Best Practice

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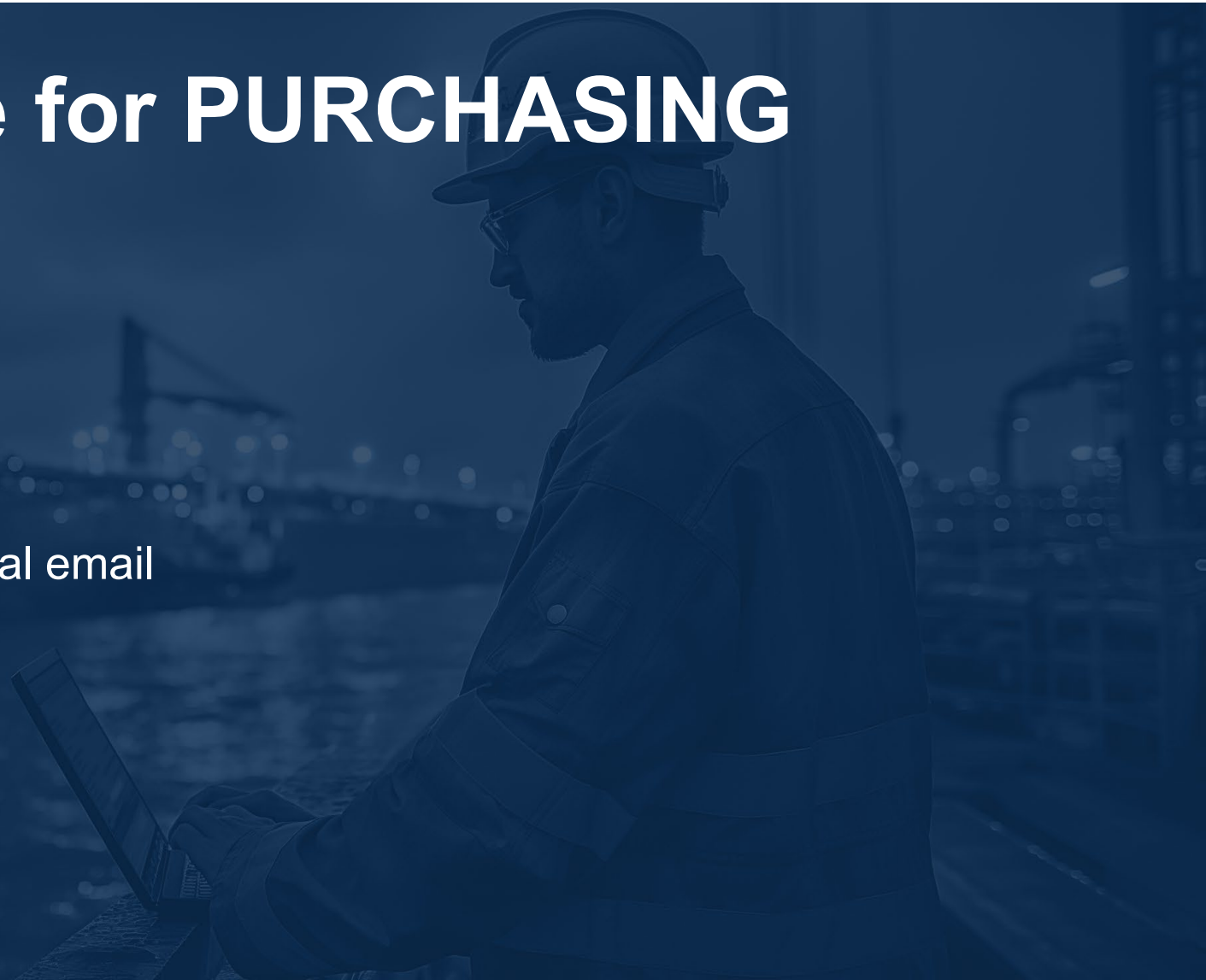
Best Practice for PURCHASING

- Contracts
- Data within the application
- Data control & quality
- Approval Control
- Work within the application, no external email
- eProcurement
- Rotatable Parts / Serialized Items
- One application



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Using NSE, Best Practice for PURCHASING

- Data quality & integrity
- Using the features
- Growing the use of features
- Holistic consideration
- Workshops / Training
- User Guides

- Workspaces
- Dashboards
- Gadgets / Graphics

Features

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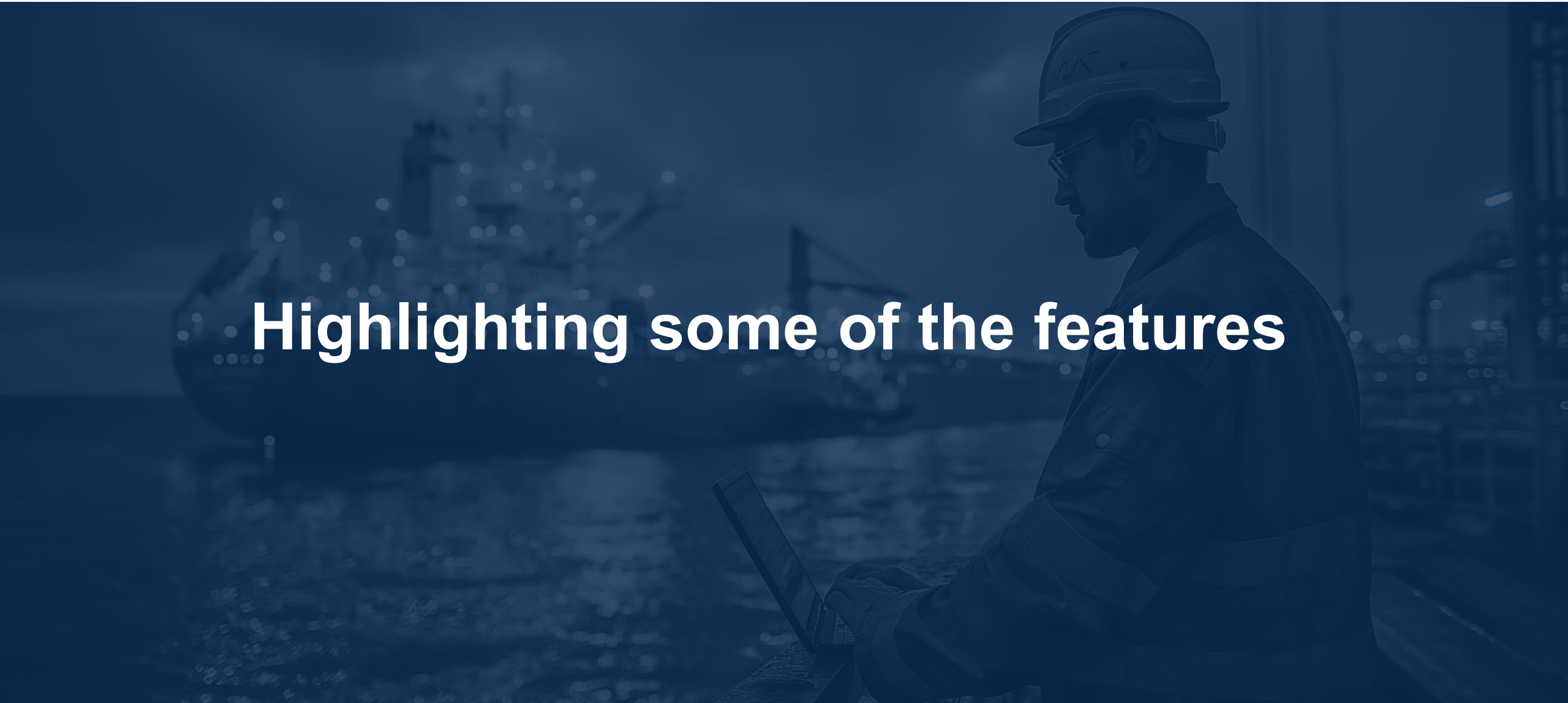

Highlighting some of the features

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Workspace, Dashboards Gadgets / Graphics

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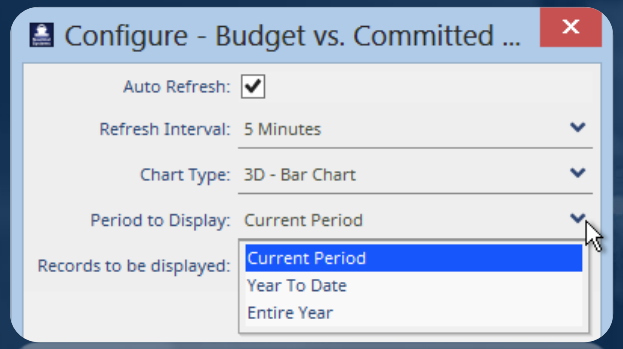
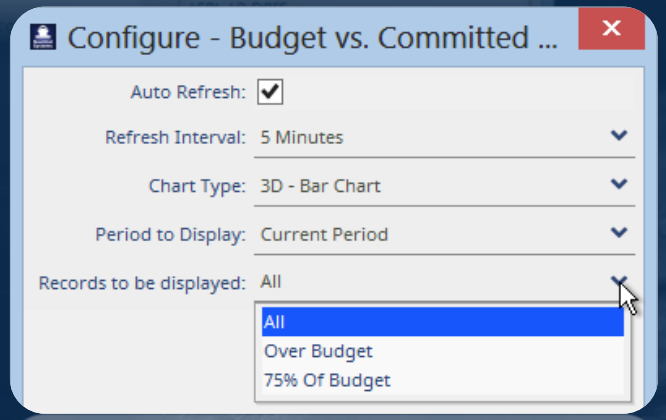
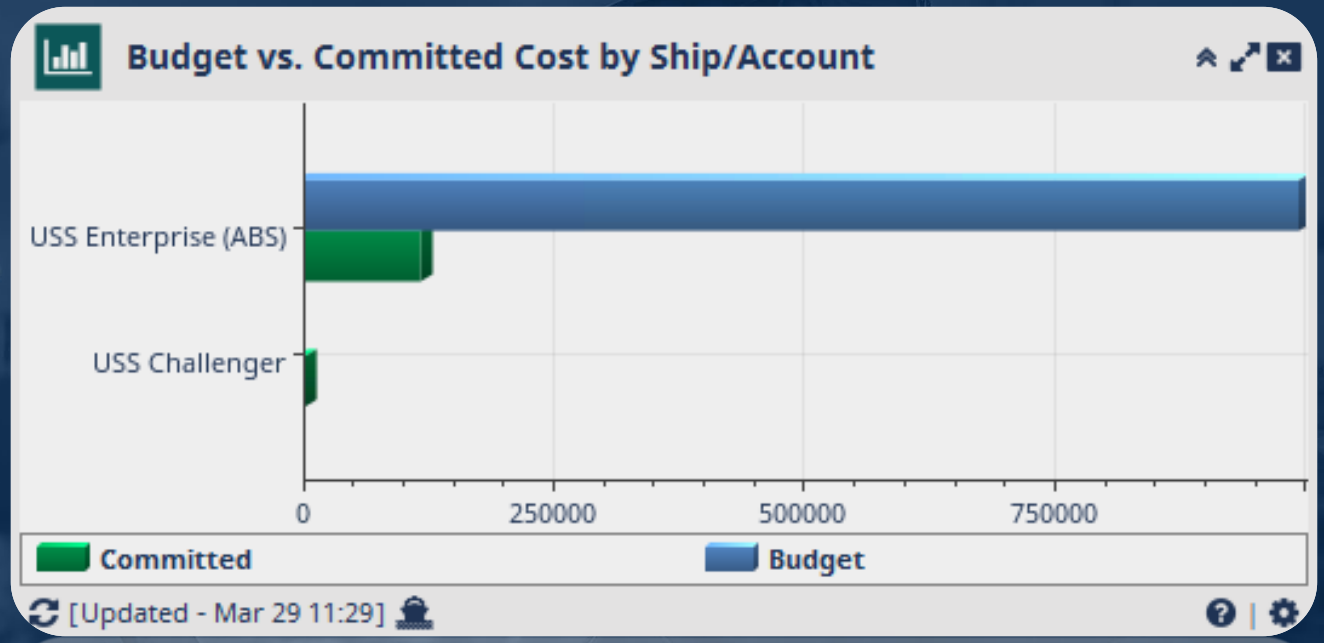
Budget vs Committed Cost





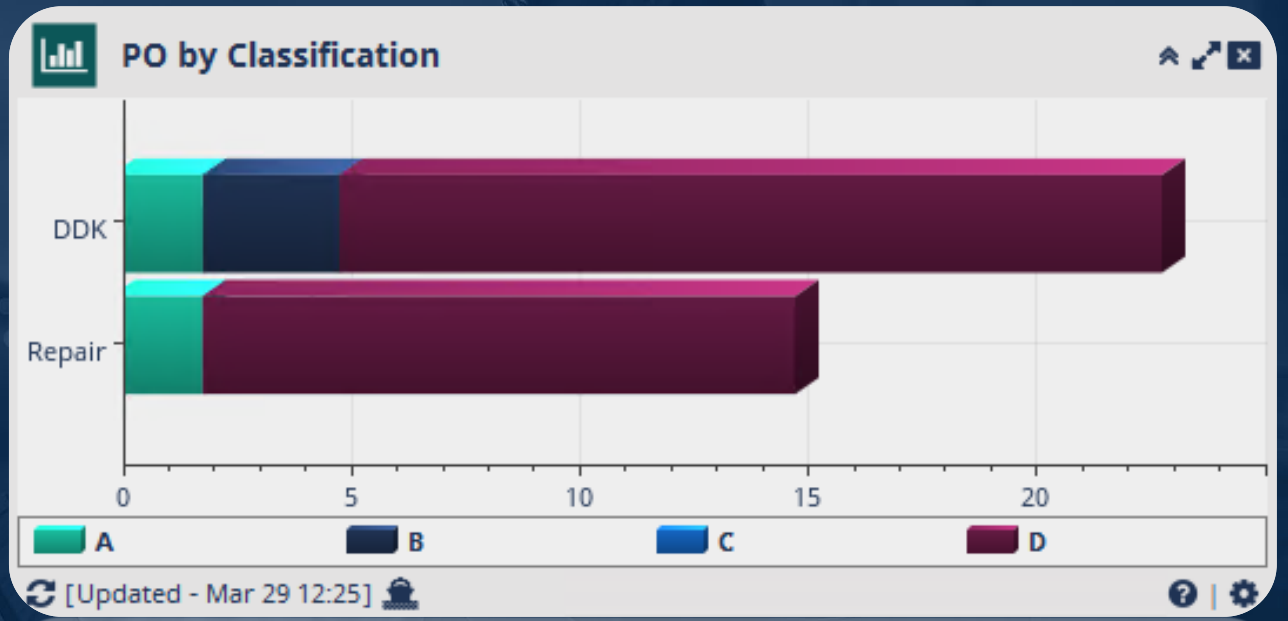


Budget vs. Committed Cost by Ship/Account

This dashboard shows Committed Cost and Budget.This dashboard is available at Fleet and Ship level.
The Fleet level view shows only those ships that the user is authorized to view, with the Committed Cost and Budget grouped by Vessel.
The Ship Level view shows the Committed Cost and Budget grouped by Account.

PO by Classification

- Classification setup of accounts
  - As defined by User
- Account classified by defined names
- Gadget will display the PO Account classification
- Gadget stacks by stacked by priority

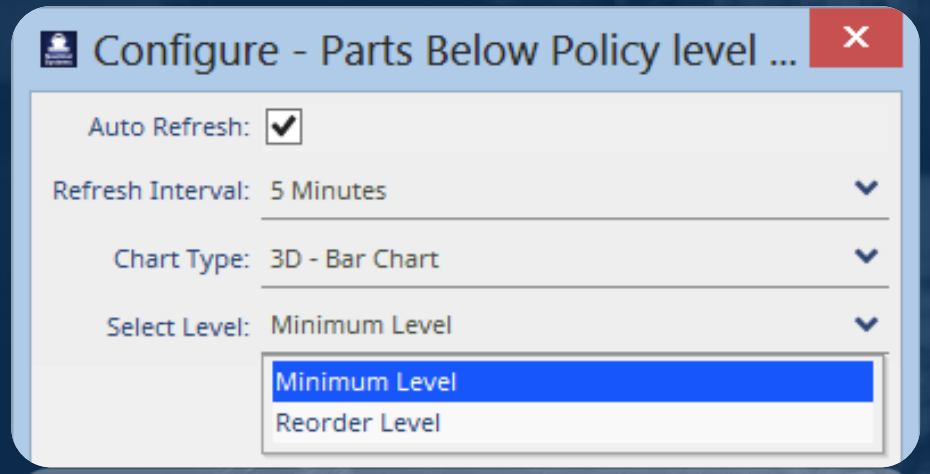


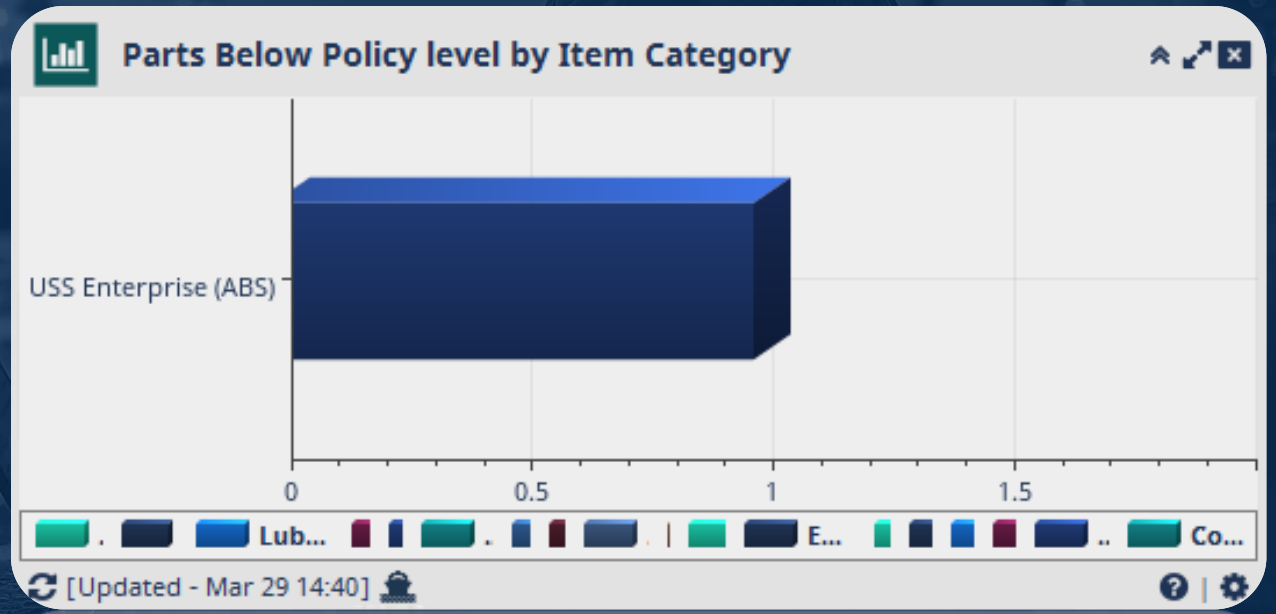
I am Approver

- I am Approver by User and Role
  - RFQs, POs, Material Contracts, Service Contracts
  - Also
    - JSAs, PTWs, MOCs
    - Deferrals

Parts Below Policy Level

- Parts Below Policy level by Item Category
  - Total number of Spares that are below a policy level (Minimum or Reorder) as selected by the user.





Saved Searches

Type here to filter

- Requisition Search
  - Outstanding Requisitions
  - Requisitions for Contract Release
  - Requisitions for Materials Transfer
  - Requisitions to be Authorized
  - Requisitions to be Reviewed

Tasks

Assigned To Me

Monday, August 26, 2024

- [UP] [Technical Defect] Test defect (#2000008)
- [UJ] [Technical Defect] ytrtret (#2000015)
- [UP] [Technical Defect] Nonconformity (#2000016)
- [UAS] [Technical Defect] Deck Crane No. 2 100 hourly (#2000017)

Updated - Aug 26 08:16

I am Approver

I am Approver

Monday, August 26, 2024

- [UAS] [Permit to Work] test revalidation (#2000003)
- [UAS] [Technical Defect] test WO with TDand forced fields (#20000

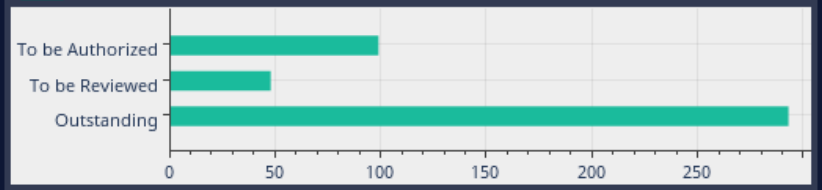
Updated - Aug 26 08:16

Message - Inbox

From	Subject	Send Date
SYSTEM GENERATED	Unsatisfactory Condition reported for Equipme...	Mon, 26 Aug...
SYSTEM GENERATED	Unsatisfactory Condition reported for Equipme...	Mon, 26 Aug...
SYSTEM GENERATED	Unsatisfactory Condition reported for Equipme...	Sun, 25 Aug ...
SYSTEM GENERATED	Unsatisfactory Condition reported for Equipme...	Sun, 25 Aug ...
SYSTEM GENERATED	Unsatisfactory Condition reported for Equipme...	Fri, 23 Aug 2...

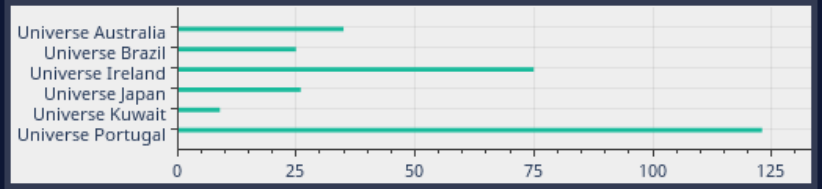
Updated - Aug 26 08:16

Requisitions by Status



Updated - Aug 26 09:10

Requisitions Outstanding by Ship

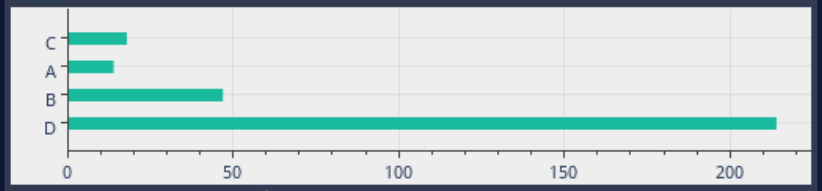


Updated - Aug 26 09:10

Request For Quotation by Status

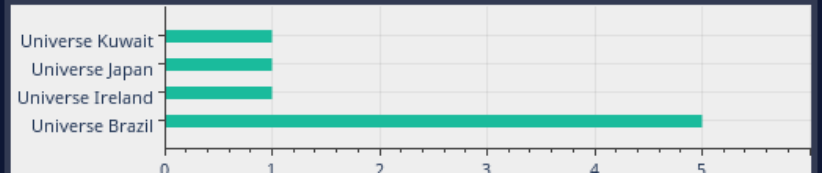
Updated - Aug 26 09:10

Requisitions Outstanding by Priority

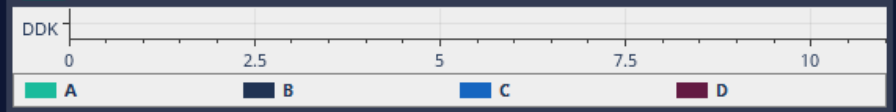


Updated - Aug 26 09:10

Critical Spare Parts Below Policy Level

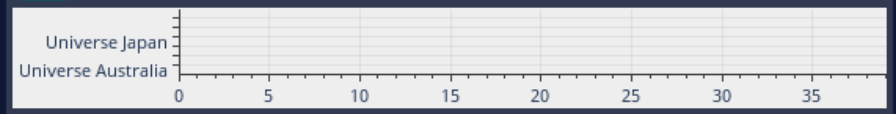


PO by Classification



Updated - Aug 26 09:10

Overdue Purchase Order Deliveries

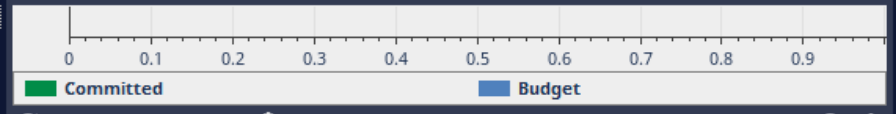


Updated - Aug 26 09:10

Transfer Orders by Status

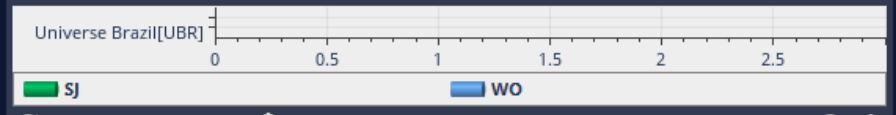
Updated - Aug 26 09:10

Budget vs. Committed Cost by Ship/Account



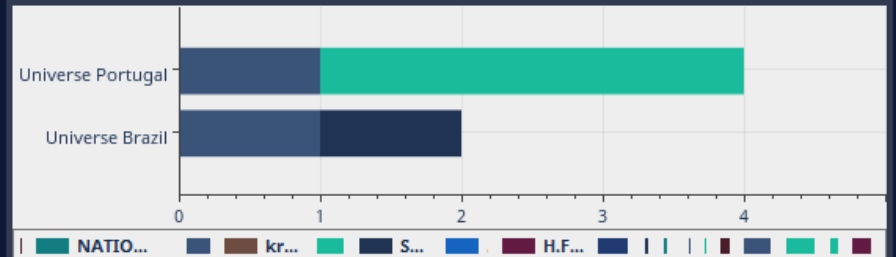
Updated - Aug 26 09:10

Materials Shortages



Updated - Aug 26 09:10

Parts Below Policy level by Item Category



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Accounts / Budget Setup

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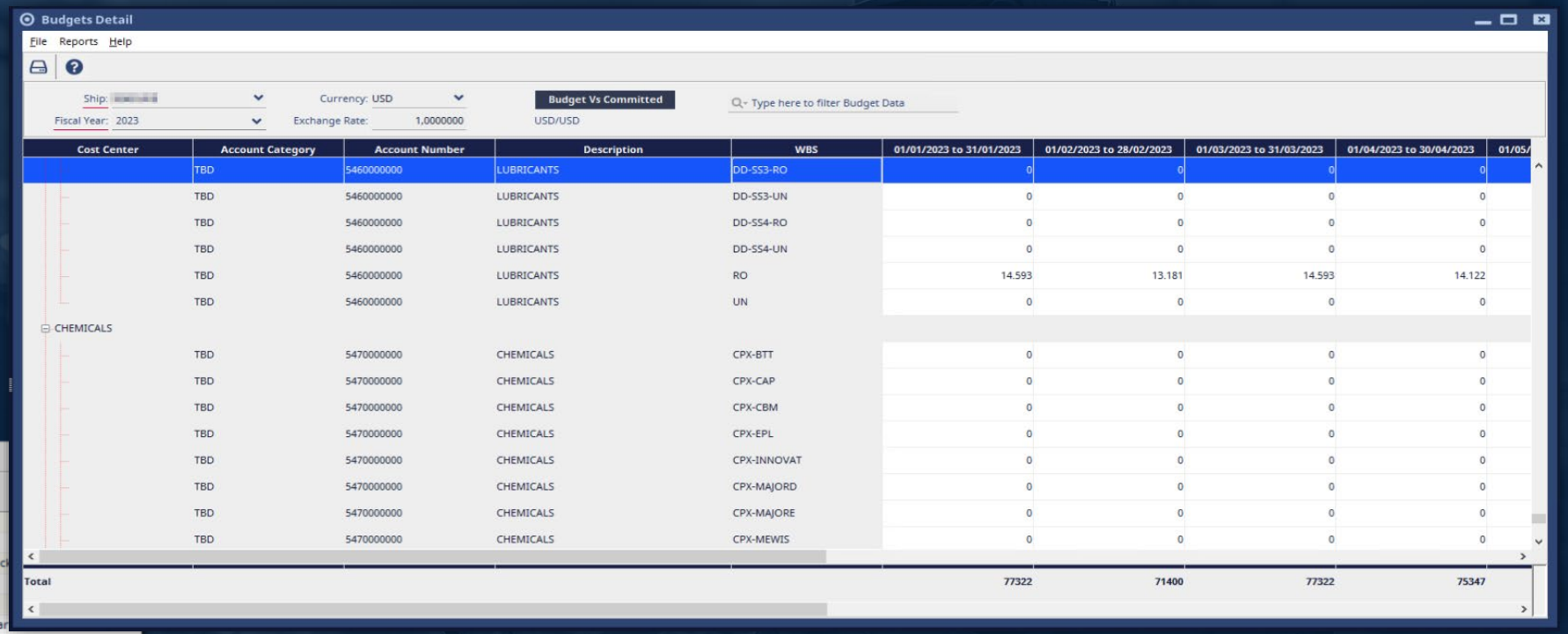
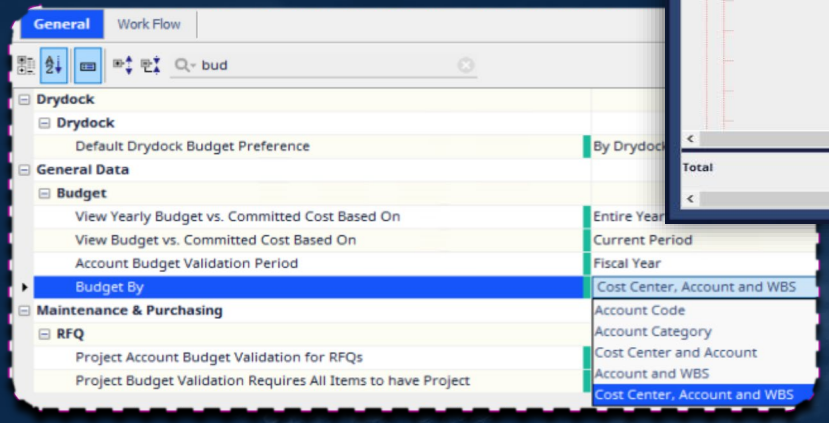
Accounts / Budget





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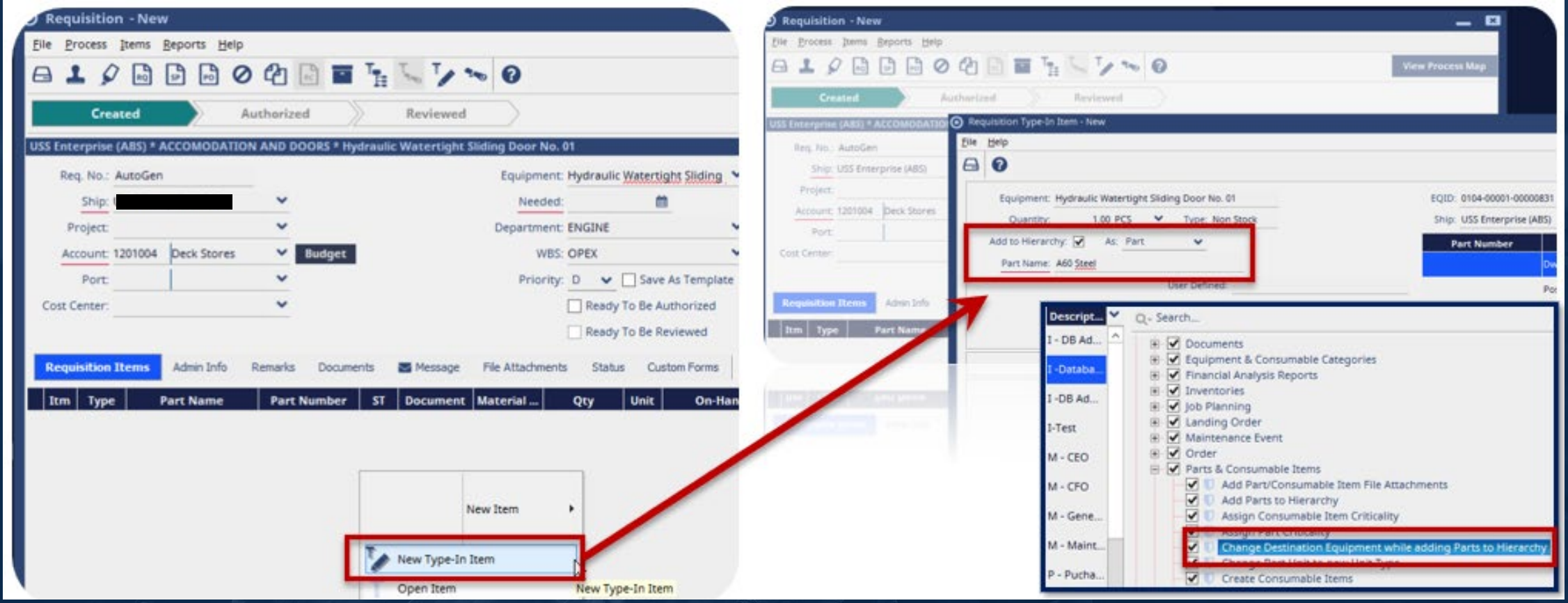
Add Parts to Hierarchy

Add Parts to Hierarchy

- Available to Ships personnel
- Office can flag and drive a part/item that was ship created
- Data Team Reviews



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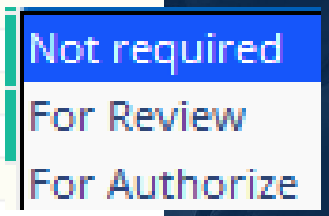
Requisition Workflow

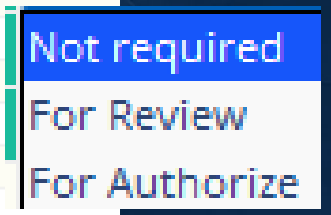
Requisition Workflow Control

- Workflow
- Drives the quality of data at source
- User forced to input data to assist / drive the purchase flow
- Editable
- Company decision of roles to play by Users, ship's personnel, office personnel

Requisition Workflow Control

Requisition	
Account Codes at Requisition Item level	Yes
Prevent additional review of already-exported Requisitions	Additional reviews prevented
Needed Date is required	For Review
Item Category required	Not required
Vendor required	Not required
Vendor Type required	Not required
Charge-To Company required for Requisition review	Not required
Account Code required	For Review
Auto Review Requisition	No
Requisition Review Account Budget Validation	Restricted to Authorized User
Items must have Estimated Cost	Not required
Enable Material Contract Release Item Status	Yes
Prevent Type-In Items on REQs	No
Prevent Cancellation of Processed Requisition	Yes
RFQ/PO/TO can be created from Reviewed Requisitions Only	No
Project required	Not required
Cost Center is required in line items	Not required
WBS is required in line items	Not required
Disable Requisition after export	No
Department is required for Requisition	No





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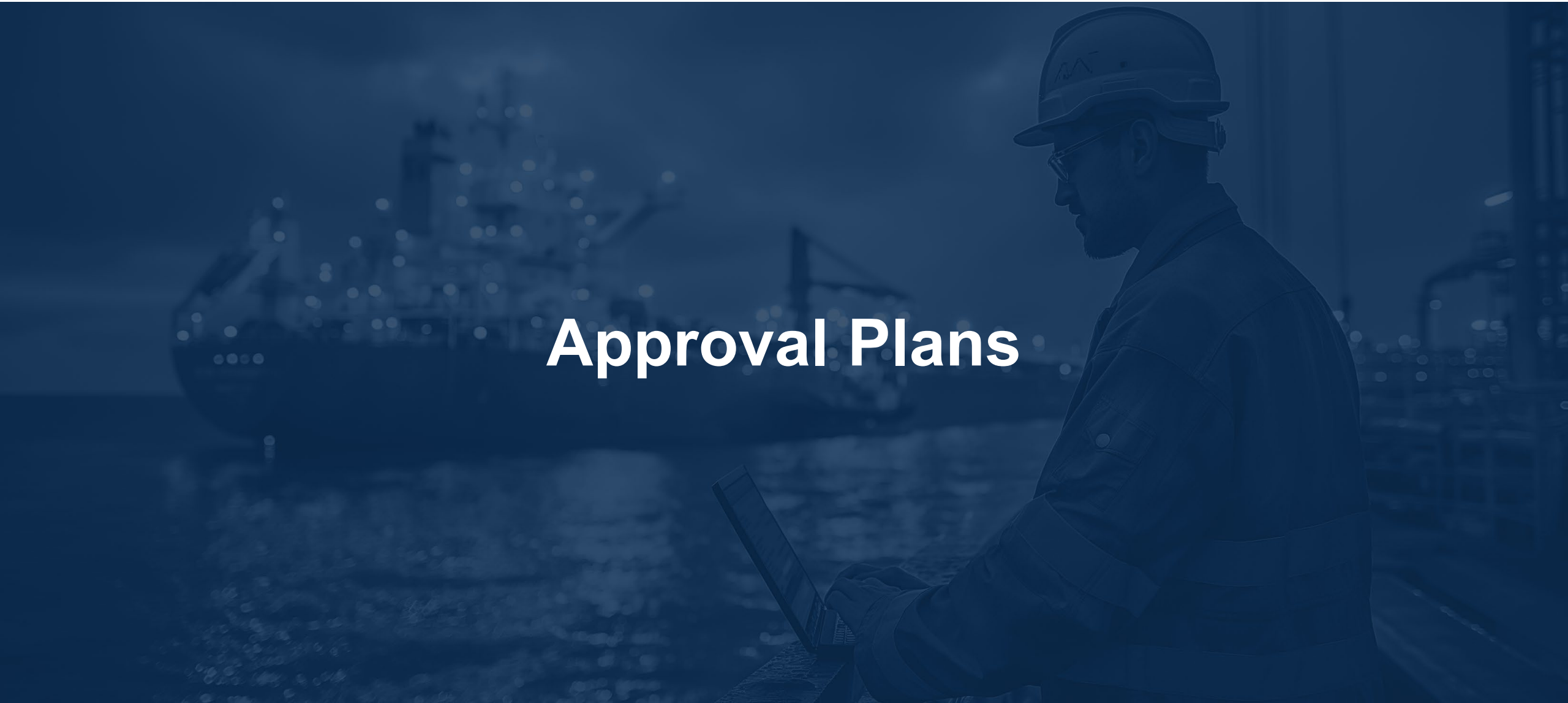

Approval Plans

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Approval Plans

Document Approval Set (DAS)

- Available for 16 types of NSE documents
- Same format
  - Request For Quotation (RFQ)
  - Purchase Order
- Apply to
  - Ships, Accounts, Projects
- Applicable to
  - Material
  - Spare
  - Services
  - All

- Accounts
- Work Break Down Structure
- Cost Centre
- Departments
- Validity
- History of changes

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Document Approval Setup

File Process Reports Help

Document: Purchase Order

Identifier: OIL

Ship: ○ PO Company ○ LOB Company ○ Fleet ● Ships

Universe Portugal

WBS:

Account: ○ Account Category ● Account

Cost Center:

Project:

Department:

Material: ○ Spare ○ Store ● Both

Service: ● All ○ Selected

Notifications: Primary Only

Setup: ● User based ○ Role based

Approve By: 7 days ☐ Hide

Effective From Date: 01-01-1970 ☐ Retire Change Log

Sequence No.	Min [USD]	Max [USD]	Primary	Backup
1	0.00	5,000.00	Hobbes, Thomas	
2	5,000.01	25,000.00	ADMIN, Database	
3	25,000.01	999,999,999.00	Descartes, Rene	
4	999,999,999.01	0.00		

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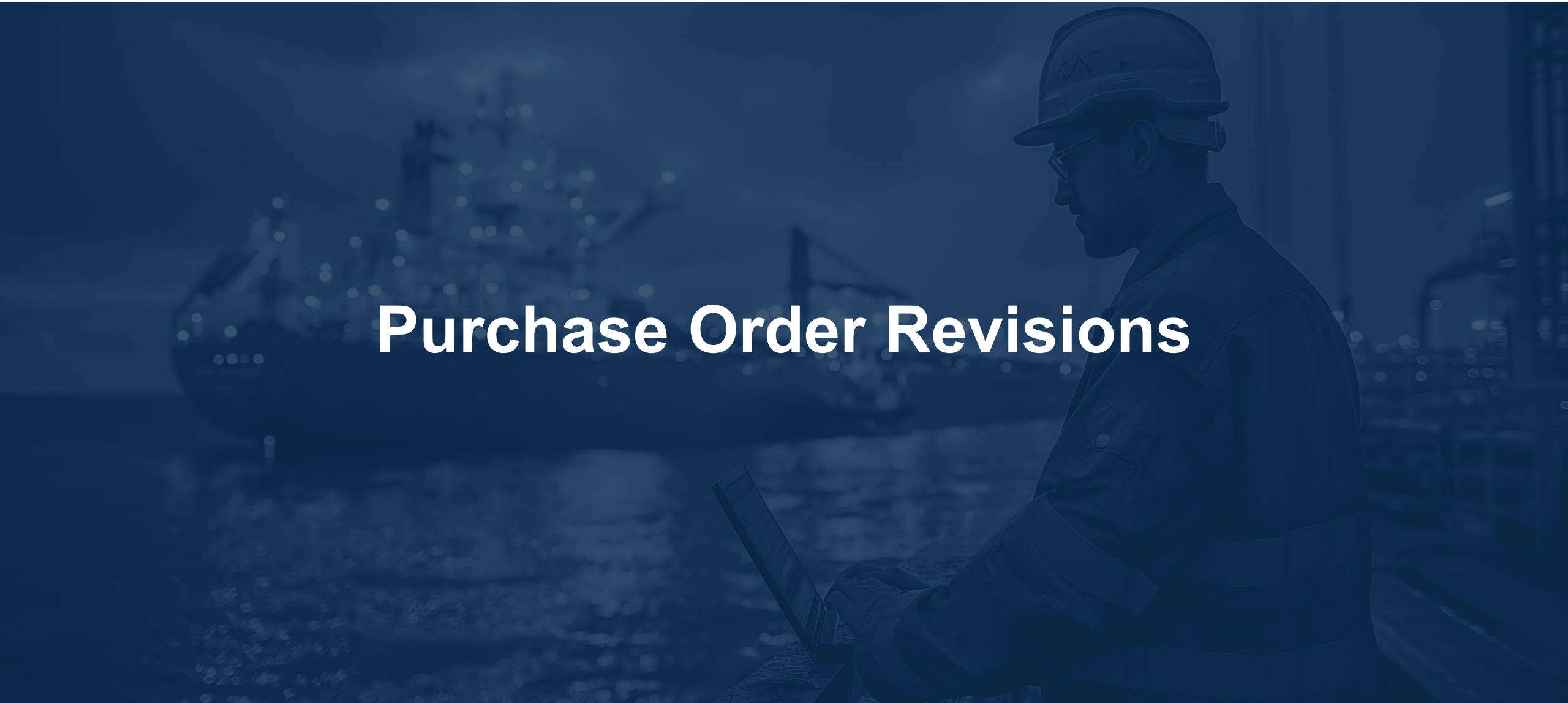

Purchase Order Revisions

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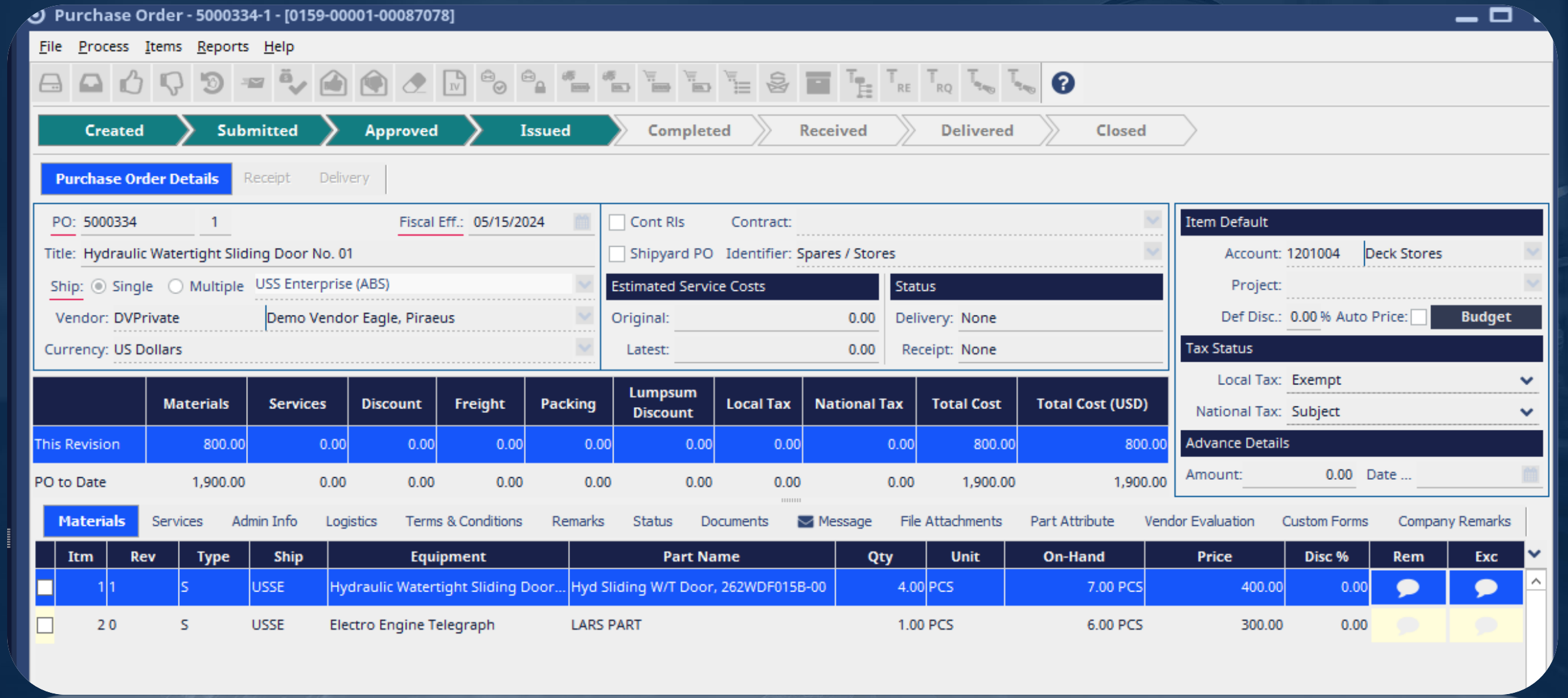

	Materials	Services	Discount	Freight	Packing	Lumpsum Discount	Local Tax	National Tax	Total Cost	Total Cost (USD)
This Revision	800.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	800.00	800.00
PO to Date	1,900.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,900.00	1,900.00

	Itm	Rev	Type	Ship	Equipment	Part Name	Qty	Unit	On-Hand	Price	Disc %	Rem	Exc
☐	1	1	S	USSE	Hydraulic Watertight Sliding Door...	Hyd Sliding W/T Door, 262WDF015B-00	4.00	PCS	7.00 PCS	400.00	0.00		
☐	2	0	S	USSE	Electro Engine Telegraph	LARS PART	1.00	PCS	6.00 PCS	300.00	0.00		

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Contracts

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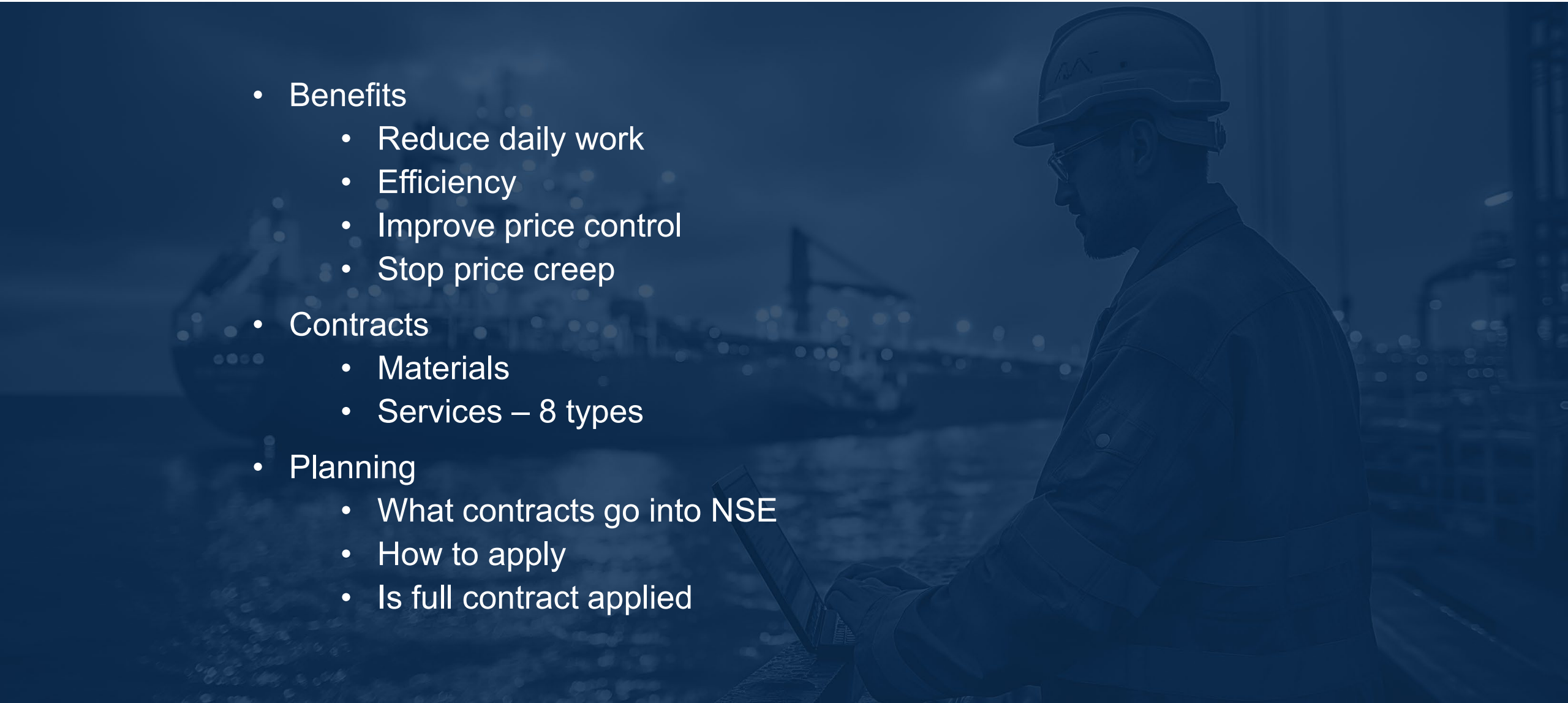
Contracts



- Benefits
  - Reduce daily work
  - Efficiency
  - Improve price control
  - Stop price creep
- Contracts
  - Materials
  - Services – 8 types
- Planning
  - What contracts go into NSE
  - How to apply
  - Is full contract applied

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Material Contracts

Material Contract - PT-JT-0124 - [0159-00455-00100727]

File Process Items Reports Help

Created → Submitted → Approved

Contract No.: PT-JT-0124 0 | Title: [redacted] | Approver: Kramer, David

Valid From: 05-06-2024 | Ships: Universe Australia | Vendor: 222130 [redacted] | Approve By Date: 12-06-2024

Valid To: 30-06-2028 | Responsible: | Identifier:

Expiration Tickler: | Total Value: 0.00 USD Calculate | View Plan

Approved On-board

Contract Items | Remarks | Terms & Conditions | Message | File Attachments | Status | Requisitions | RFQ's | Purchase Orders | Custom Forms

Vendor Zone
- Europe
- USA
- Default

Contract Items | Terms & Conditions

Currency: EUR | Payment Terms: | Items: 95

Ship	Equipment	Part Name	Part Number	Committed Qty	Unit	Price/Unit
UAS	Paints - JOTUN	Pioneer Primer Gray	Pioneer Primer gray	1.00	LI	5.0000
UAS	Paints - JOTUN	Pioner Primer Red	Pioner Primer Red	1.00	LI	5.0000
UAS	Paints - JOTUN	Pioner Topcoat Blue	Pioner Topcoat Black	1.00	LI	2.0000
UAS	Paints - JOTUN	Pioner Topcoat Green sh. 137	Pioner Topcoat Green sh. 137	1.00	LI	2.0000
UAS	Paints - JOTUN	Pioner Topcoat Grey sh. 38	Pioner Topcoat Grey sh. 38	1.00	LI	2.0000
UAS	Paints - JOTUN	Pioner Topcoat Red sh. 49	Pioner Topcoat Red sh. 49	1.00	LI	20.0000

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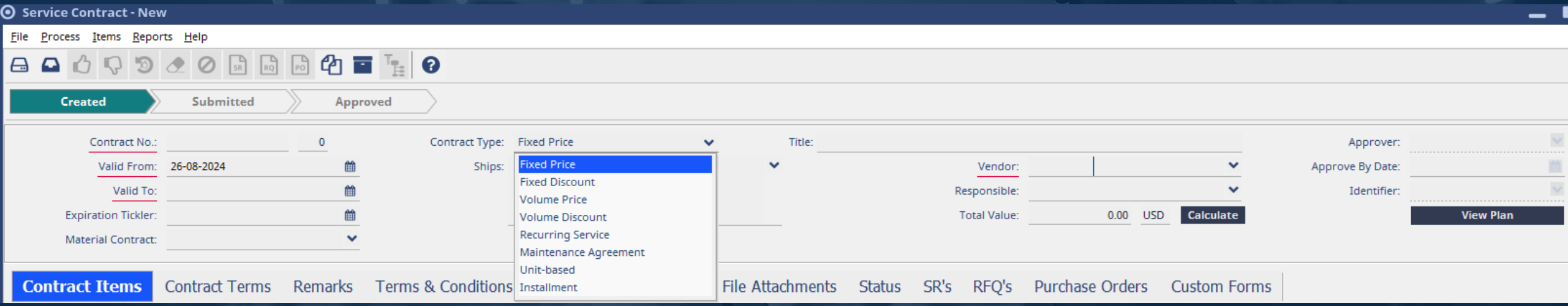
Service Contracts



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eProcurement

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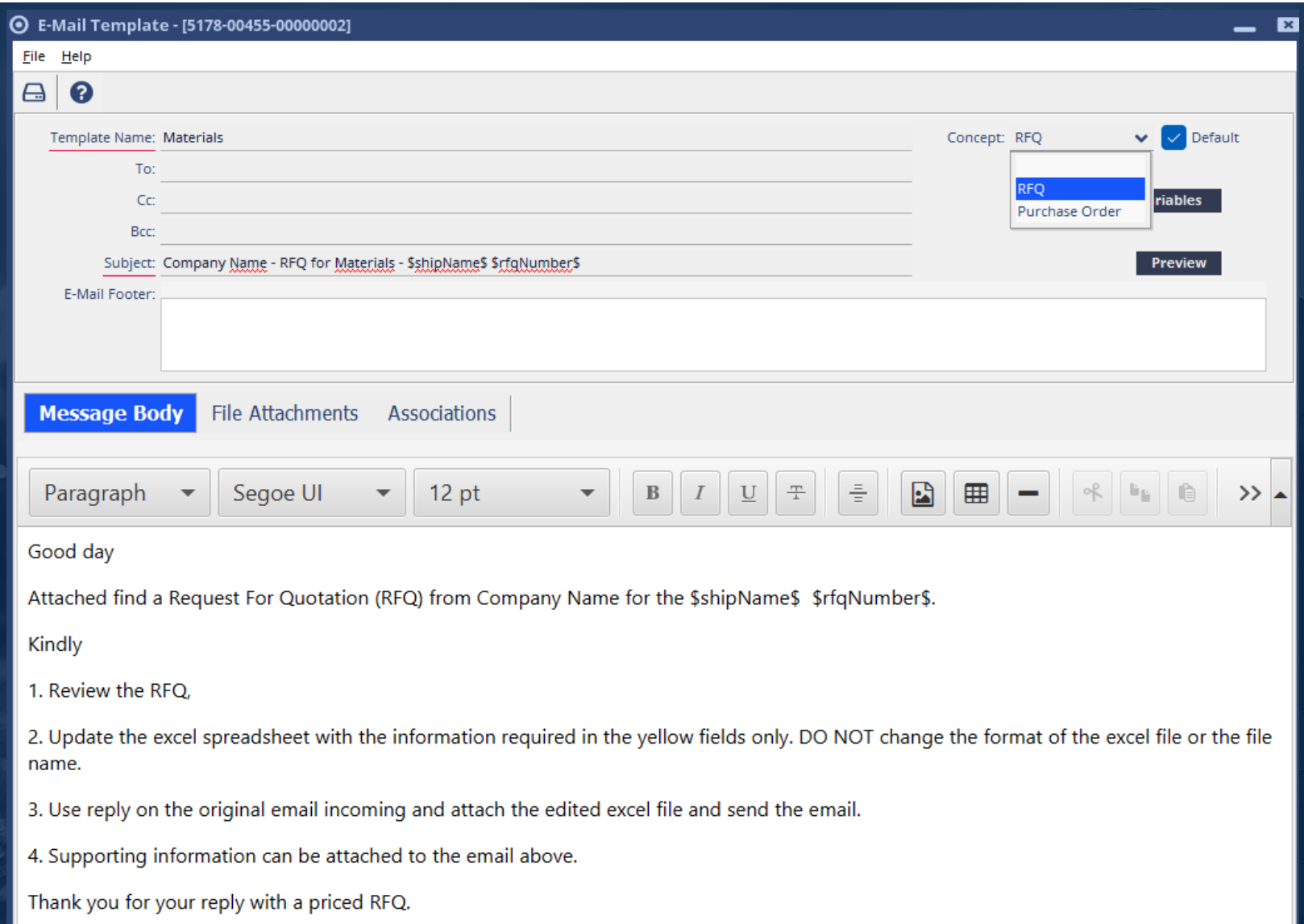
eProcurement

eProc

- Benefits
  - Efficiency
  - Less typing
  - Less errors / typos
  - Data control
  - Digitization
  - Documents flow out and in to NS with attachments
  - PO acceptance or decline
- Applies to
  - Request For Quotation
  - Purchase Orders
- Applicable to
  - Material
  - Services

- Providers of eProc services
  - ShipServ
  - NSE email eProc
- NSE email eProc
  - Efficient
  - Easy
  - Associations of the email template to:
    - Vendors
    - Ships
    - Line of Business (LoB)

eProc email Template



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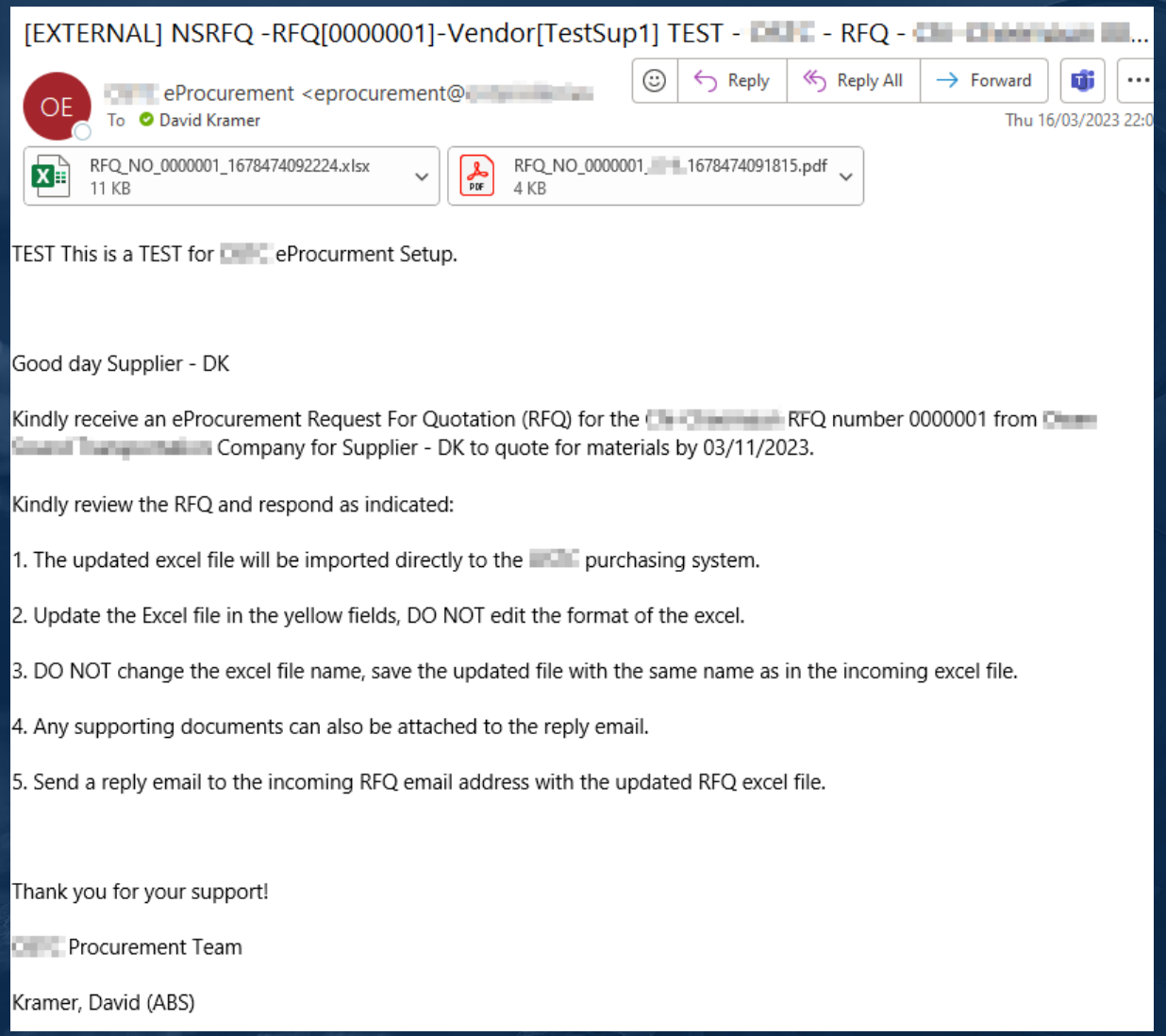
eProc RFQ Sample



[EXTERNAL] NSRFQ -RFQ[0000001]-Vendor[TestSup1] TEST - [redacted] - RFQ - [redacted]...

OE [redacted] eProcurement <eprocurement@[redacted]

To David Kramer

Reply | Reply All | Forward

Thu 16/03/2023 22:0

RFQ_NO_0000001_1678474092224.xlsx 11 KB

RFQ_NO_0000001_[redacted]1678474091815.pdf 4 KB

TEST This is a TEST for [redacted] eProcurment Setup.

Good day Supplier - DK

Kindly receive an eProcurement Request For Quotation (RFQ) for the [redacted] RFQ number 0000001 from [redacted] Company for Supplier - DK to quote for materials by 03/11/2023.

Kindly review the RFQ and respond as indicated:

1. The updated excel file will be imported directly to the [redacted] purchasing system.

2. Update the Excel file in the yellow fields, DO NOT edit the format of the excel.

3. DO NOT change the excel file name, save the updated file with the same name as in the incoming excel file.

4. Any supporting documents can also be attached to the reply email.

5. Send a reply email to the incoming RFQ email address with the updated RFQ excel file.

Thank you for your support!

[redacted] Procurement Team

Kramer, David (ABS)

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Logistics
Freight Forwarding

Logistics

- Benefits
  - Efficiency
  - Good logistics control
  - Digitization
  - Interface with logistics providers
- Applies to
  - Purchase Order
  - Delivery
  - Warehouse
  - Logistics Providers
- Documents
  - Purchase Order
  - Shipping Instruction
  - Shipping Manifest
  - Landing Order
  - Transfer Order

- Moves Purchasing information in and out
  - Issued Purchase Order Export
  - Materials Receipt Import
  - Shipping Instruction Export
  - Shipping Manifest Import

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AND….

THERE'S MORE….

Poll Question and Answer

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Use the mobile app for the PURCHASING poll, and your questions?

#NSUC24

How many points did you get?

Use the NSUC app leaderboard to check your score and keep participating throughout the conference for a chance to win prizes (and bragging rights)!

#NSUC24

THANK YOU
#NSUC24
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