

24<sup>TH</sup> ANNUAL GLOBAL  
NAUTICAL SYSTEMS

# USER CONFERENCE



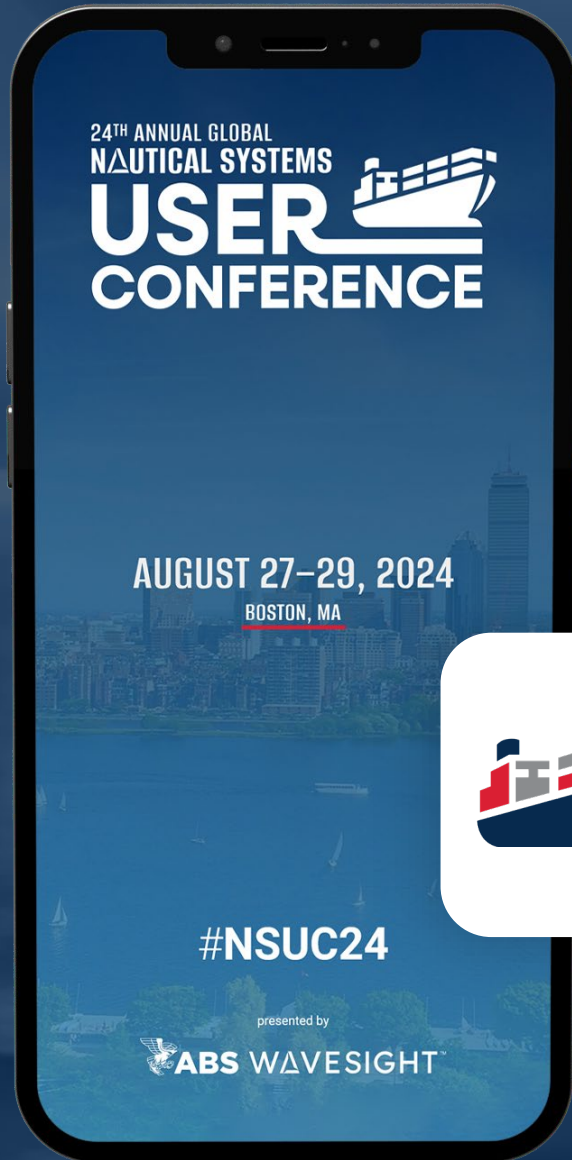
# Best Practices – Purchasing

David Kramer

8/27/2024

Presented by





# GET ON THE LEADERBOARD!

REMINDER: You can earn points during this session! Submit your questions, answer polls and leave feedback on this presentation through the NSUC24 mobile app.

The more you use the app, the more points you earn. Winners will be announced daily.



# 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.

# Agenda

Changing Environment

Continuous Improvement

Best Practice

Features

Poll, Question & Answer



# 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



# 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

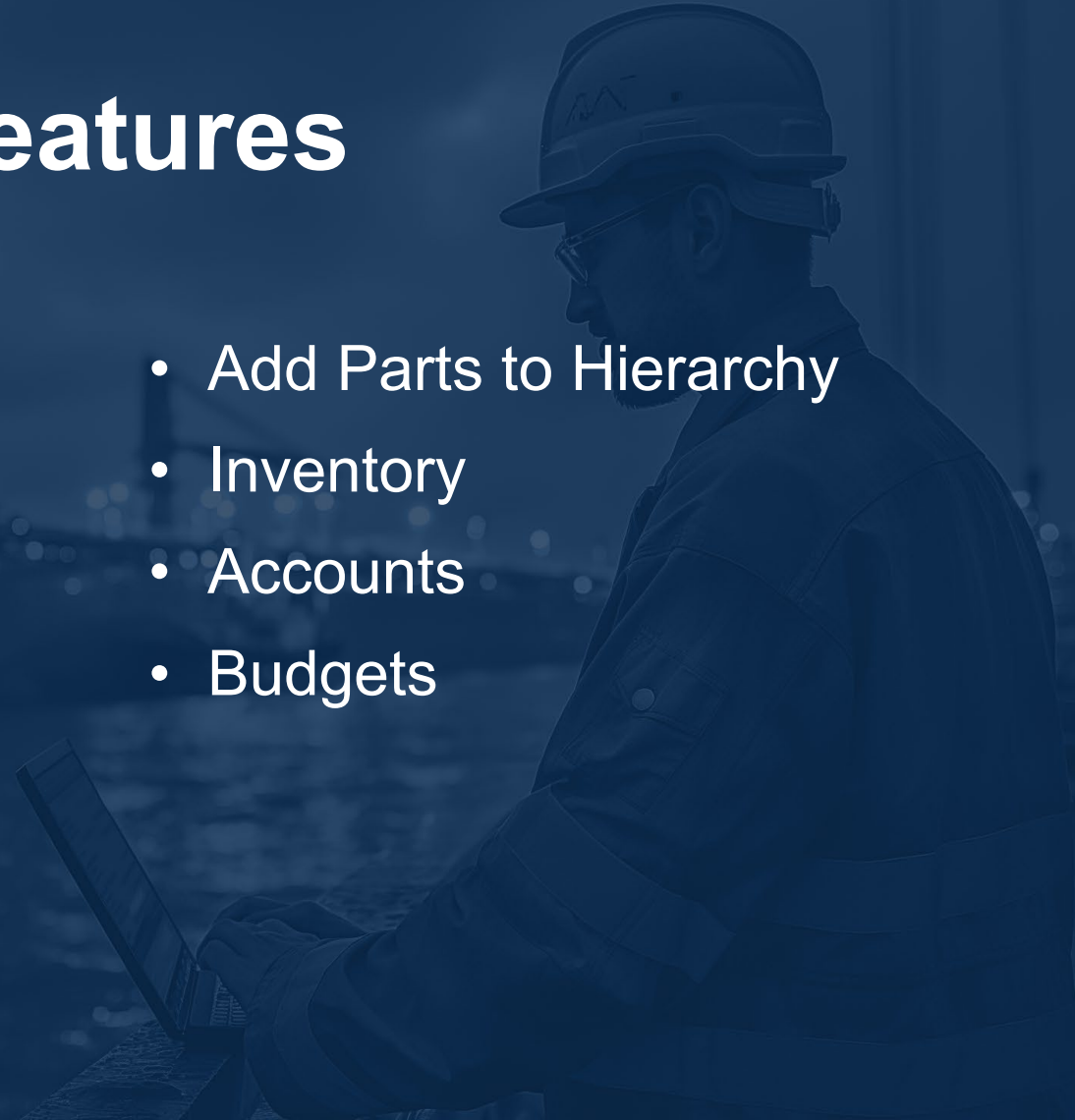
# AMERICA'S CUP SAILING



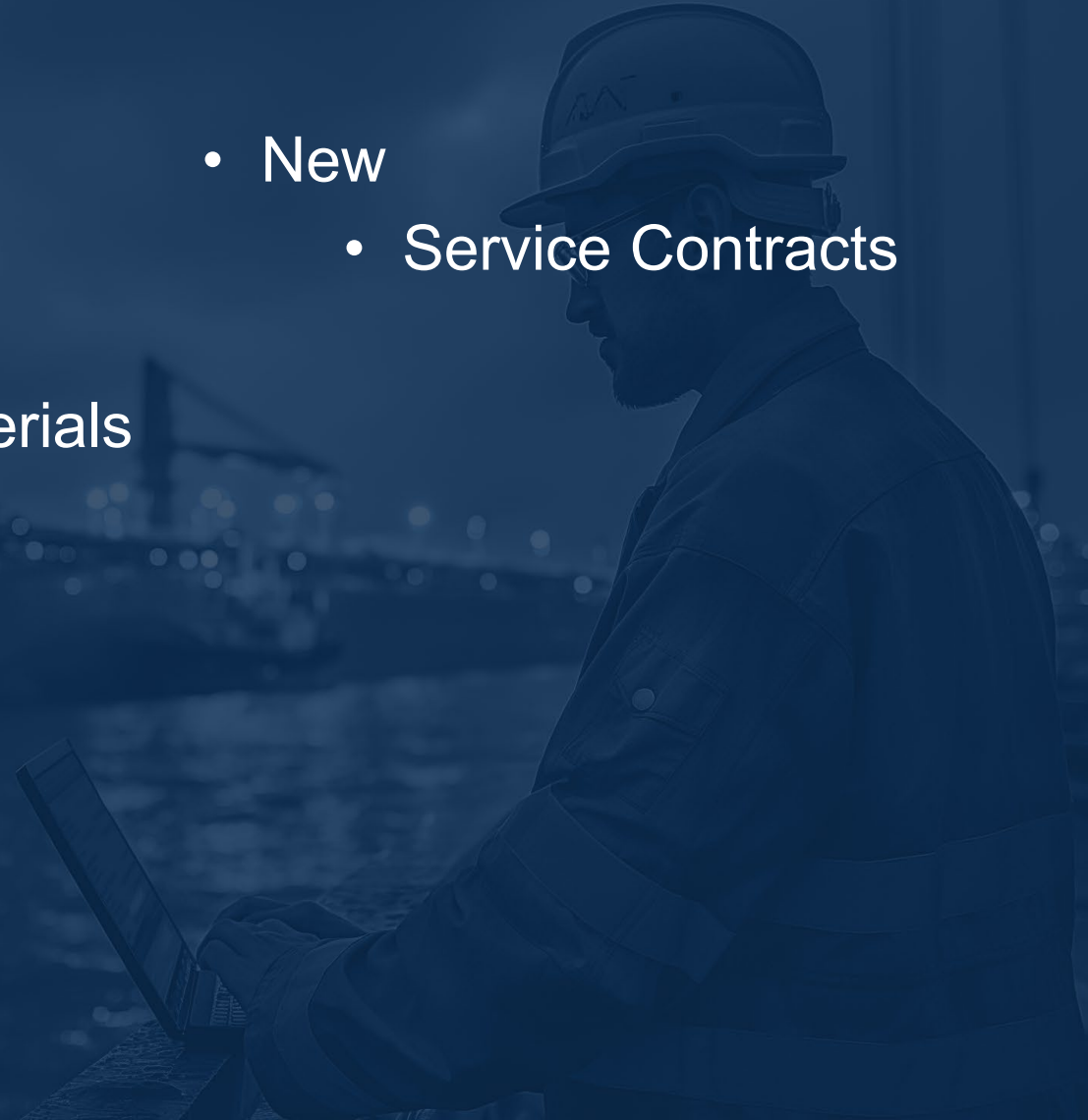


# Features

- 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

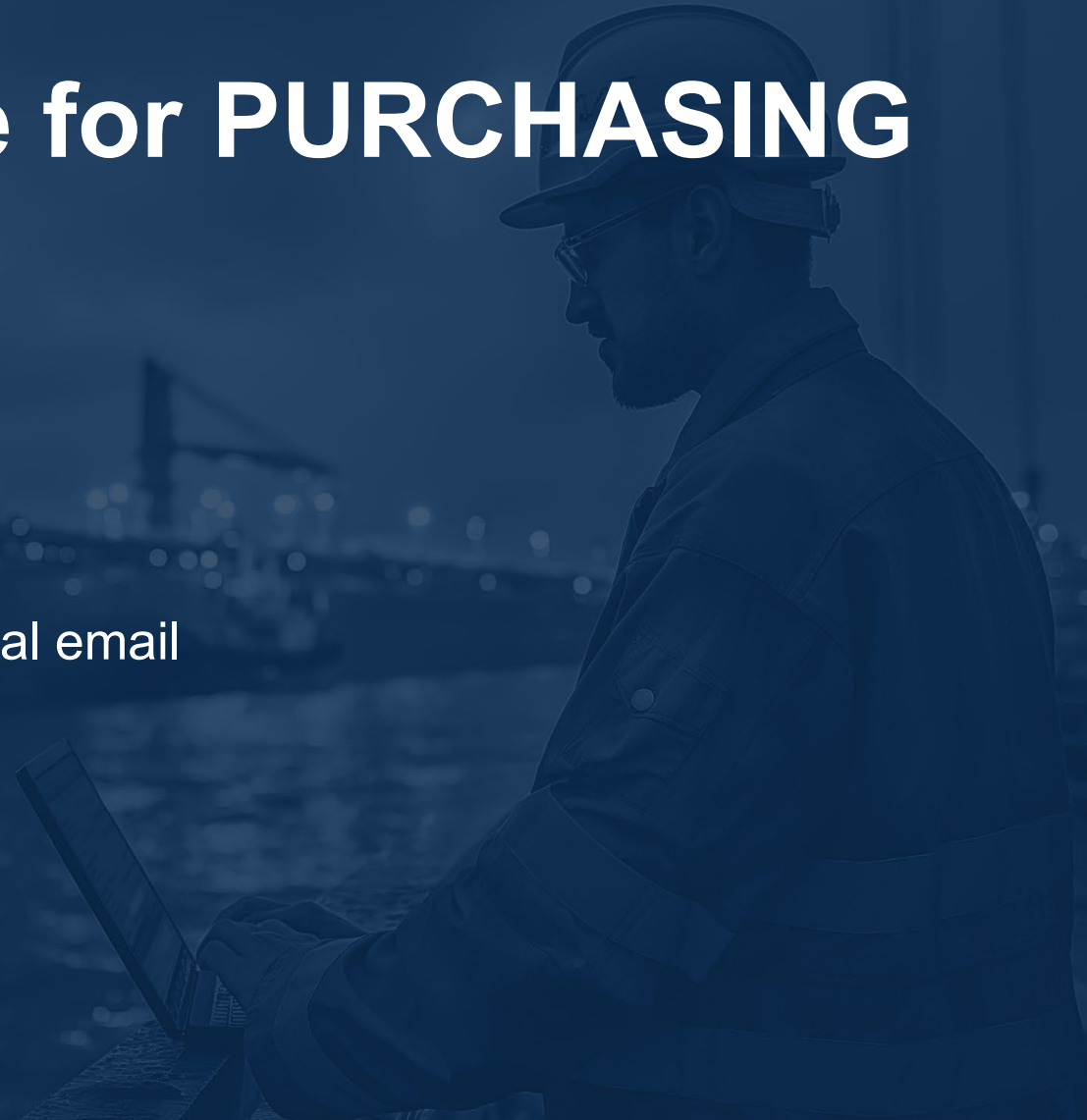
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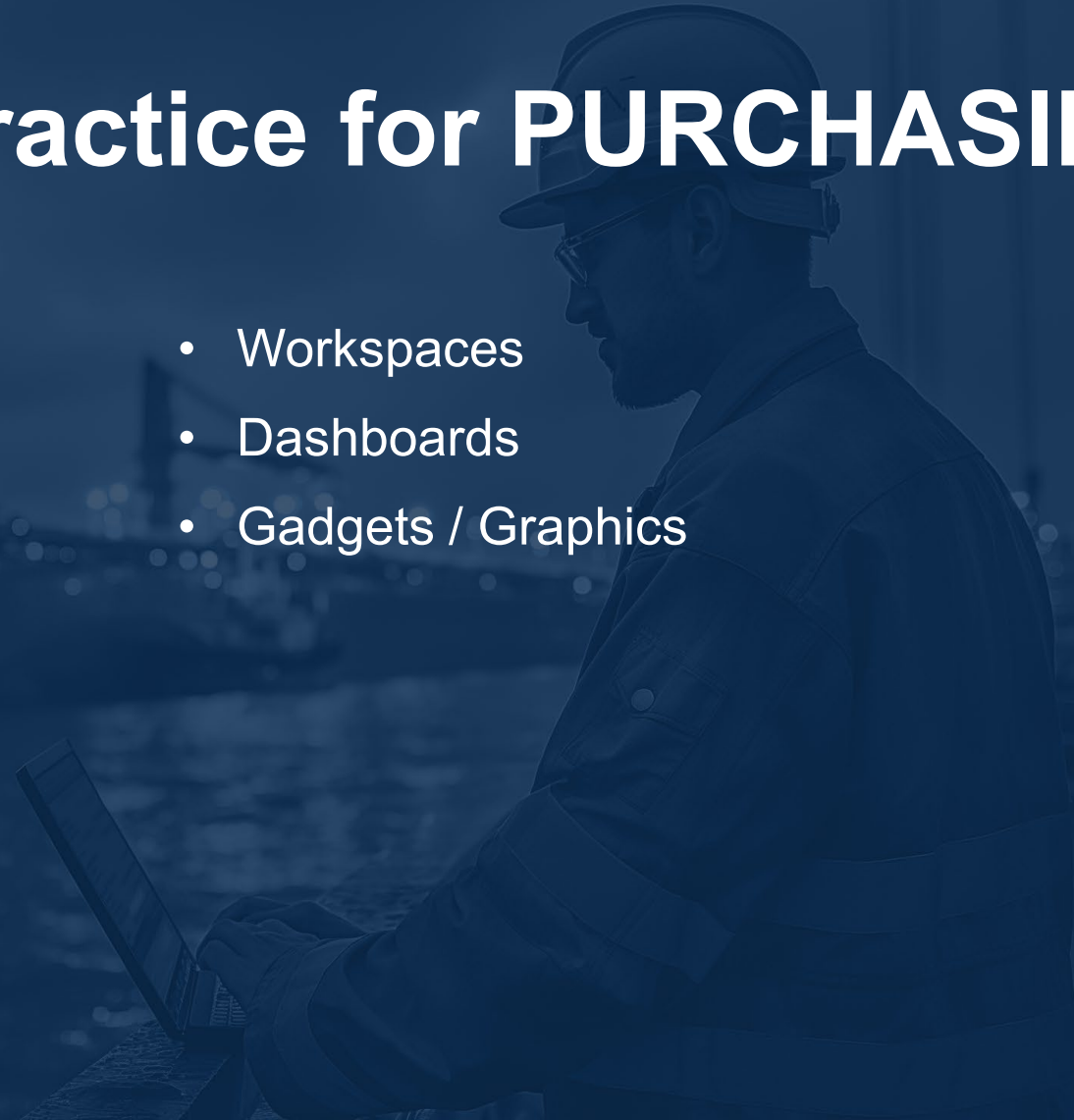
# Best Practice for PURCHASING

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



# 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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**ABS WAVESIGHT™**



# Highlighting some of the features



# Workspace, Dashboards Gadgets / Graphics



# Budget vs Committed Cost

**Configure - Budget vs. Committed ...**

Auto Refresh: ☒

Refresh Interval: 5 Minutes

Chart Type: 3D - Bar Chart

Period to Display: Current Period

Records to be displayed: **Current Period**  
Year To Date  
Entire Year

**Configure - Budget vs. Committed ...**

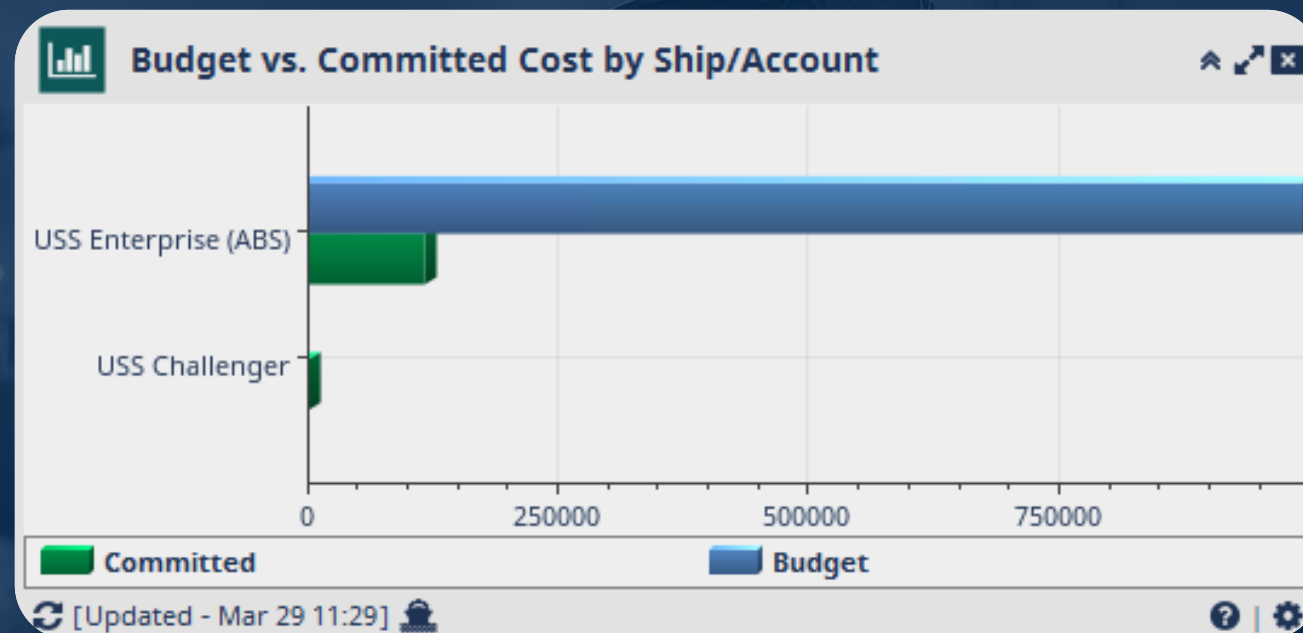
Auto Refresh: ☒

Refresh Interval: 5 Minutes

Chart Type: 3D - Bar Chart

Period to Display: Current Period

Records to be displayed: **All**  
Over Budget  
75% Of Budget

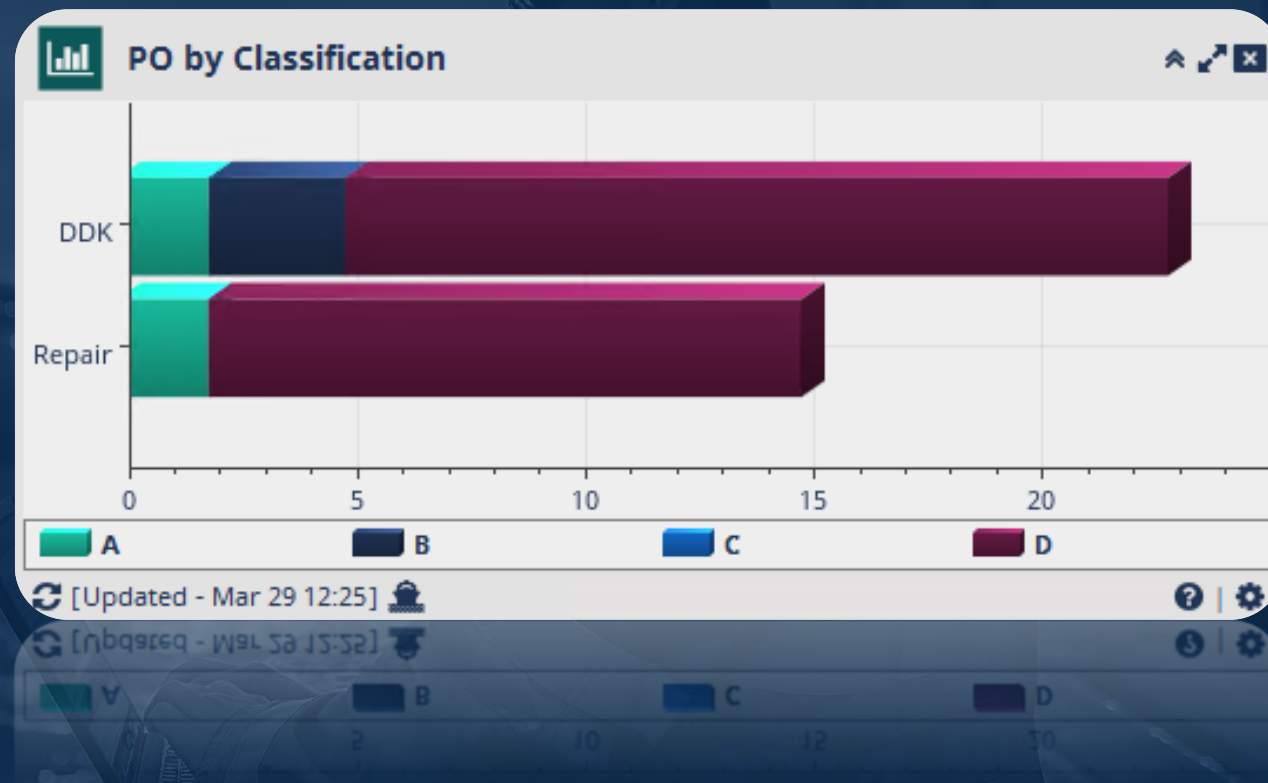


## Budget vs. Committed Cost by Ship/Account

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.

 **Configure - Parts Below Policy level ...** ✕

Auto Refresh: ☒

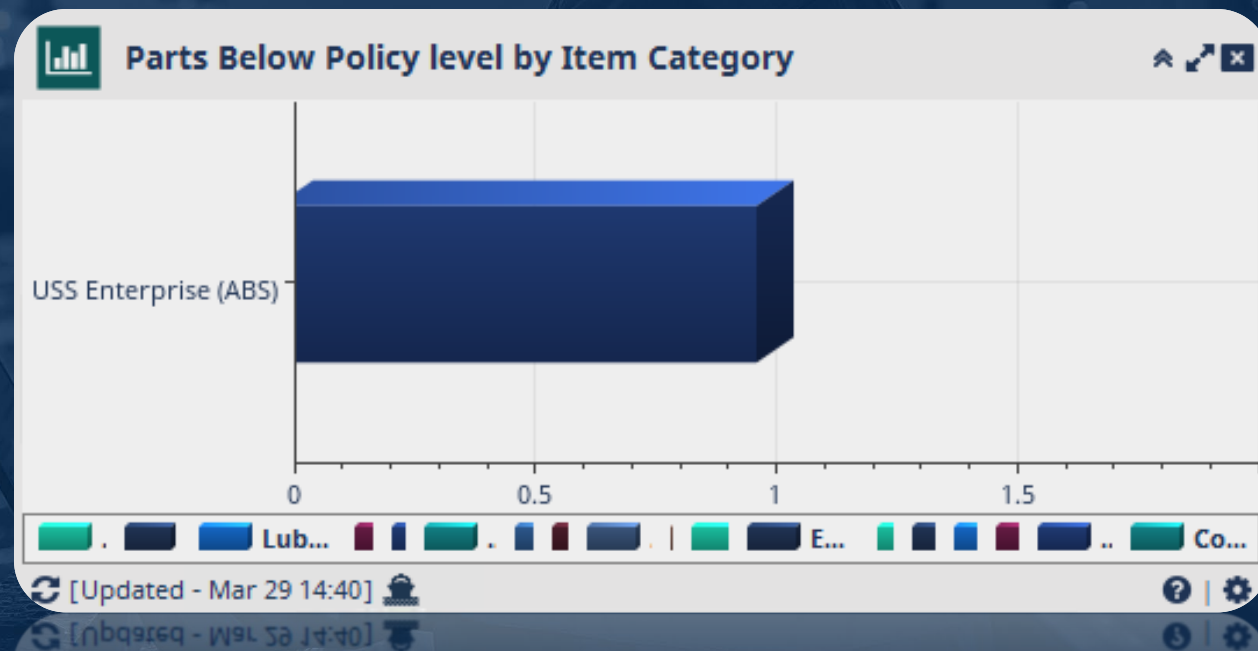
Refresh Interval: 5 Minutes ▼

Chart Type: 3D - Bar Chart ▼

Select Level: Minimum Level ▼

Minimum Level

Reorder Level



📌

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

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📌

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)

[UAS] [Technical Defect] Deck Crane No. 2 100 hourly (#2000018)

Updated - Aug 26 08:16

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⚙️

📌

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 (#2000004)

Updated - Aug 26 08:16

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⚙️

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Message - Inbox

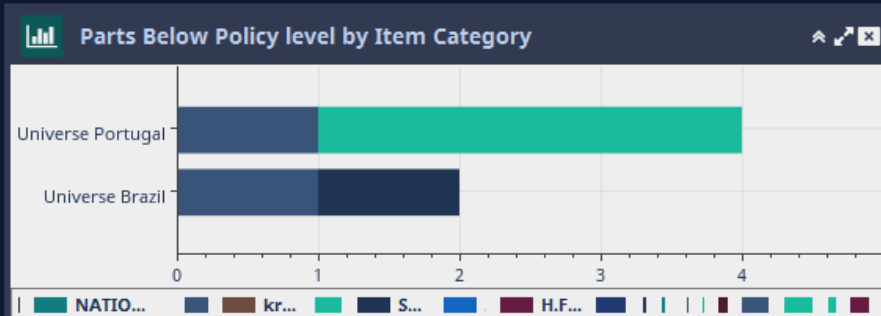
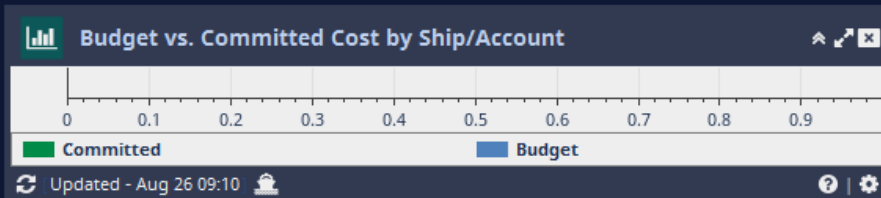
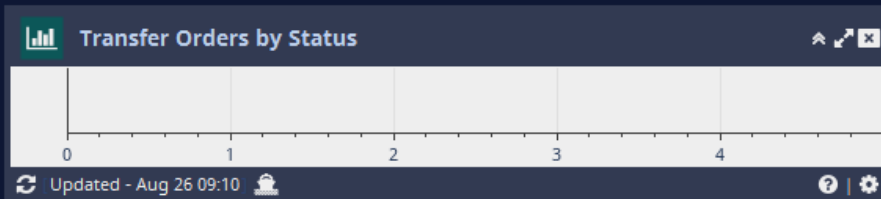
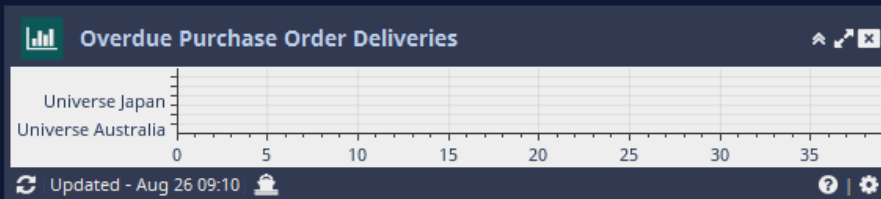
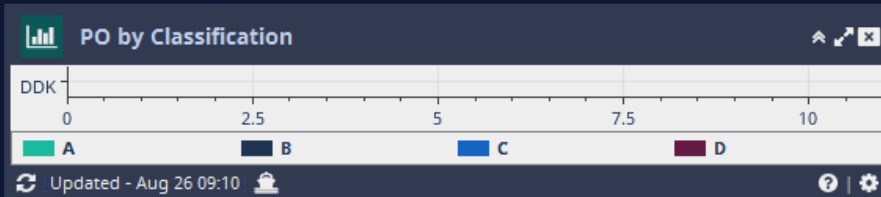
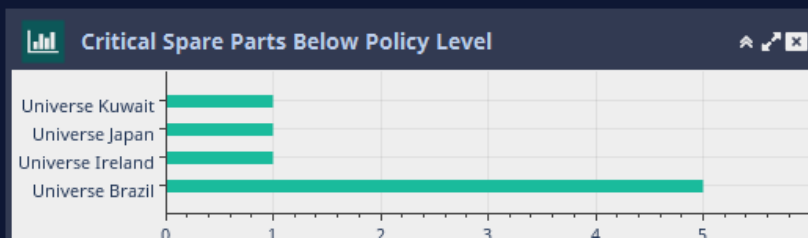
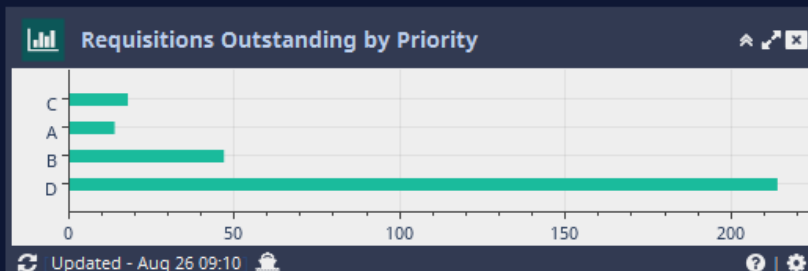
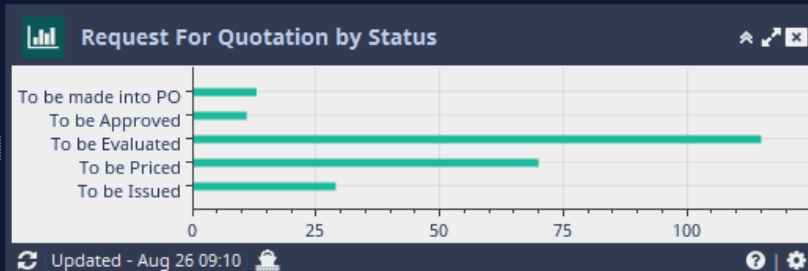
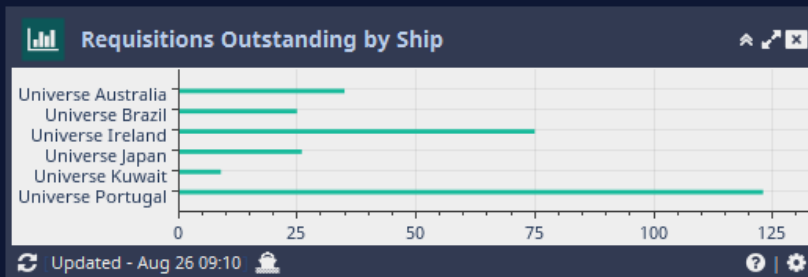
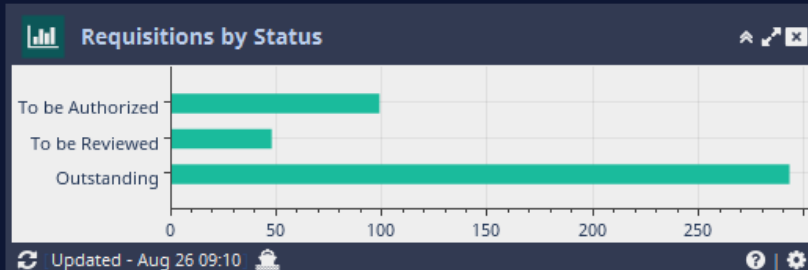
🔍

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

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# Accounts / Budget Setup

# Accounts / Budget

**Budgets Detail**

File Reports Help

Ship:  Currency: USD  Budget Vs Committed  Q- Type here to filter Budget Data

Fiscal Year: 2023  Exchange Rate: 1.0000000 USD/USD

Cost Center	Account Category	Account Number	Description	WBS	01/01/2023 to 31/01/2023	01/02/2023 to 28/02/2023	01/03/2023 to 31/03/2023	01/04/2023 to 30/04/2023	01/05/2023 to 31/05/2023
TBD		5460000000	LUBRICANTS	DD-S53-RO	0	0	0	0	0
TBD		5460000000	LUBRICANTS	DD-S53-UN	0	0	0	0	0
TBD		5460000000	LUBRICANTS	DD-S54-RO	0	0	0	0	0
TBD		5460000000	LUBRICANTS	DD-S54-UN	0	0	0	0	0
TBD		5460000000	LUBRICANTS	RO	14.593	13.181	14.593	14.122	
TBD		5460000000	LUBRICANTS	UN	0	0	0	0	0
<b>CHEMICALS</b>									
TBD		5470000000	CHEMICALS	CPX-BTT	0	0	0	0	0
TBD		5470000000	CHEMICALS	CPX-CAP	0	0	0	0	0
TBD		5470000000	CHEMICALS	CPX-CBM	0	0	0	0	0
TBD		5470000000	CHEMICALS	CPX-EPL	0	0	0	0	0
TBD		5470000000	CHEMICALS	CPX-INNOVAT	0	0	0	0	0
TBD		5470000000	CHEMICALS	CPX-MAJORD	0	0	0	0	0
TBD		5470000000	CHEMICALS	CPX-MAJORE	0	0	0	0	0
TBD		5470000000	CHEMICALS	CPX-MEWIS	0	0	0	0	0
<b>Total</b>					<b>77322</b>	<b>71400</b>	<b>77322</b>	<b>75347</b>	

**General** Work Flow

Q- bud

- Drydock**
  - Drydock
    - Default Drydock Budget Preference
- General Data**
  - Budget
    - View Yearly Budget vs. Committed Cost Based On
    - View Budget vs. Committed Cost Based On
    - Account Budget Validation Period
    - Budget By
      - Entire Year
      - Current Period
      - Fiscal Year
      - Cost Center, Account and WBS
- Maintenance & Purchasing**
  - RFQ
    - Project Account Budget Validation for RFQs
    - Project Budget Validation Requires All Items to have Project

Account Code  
Account Category  
Cost Center and Account  
Account and WBS  
Cost Center, Account and WBS



# 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

**Requisition - New**

File Process Items Reports Help

Created Authorized Reviewed

USS Enterprise (ABS) \* ACCOMODATION AND DOORS \* Hydraulic Watertight Sliding Door No. 01

Req. No.: AutoGen Equipment: Hydraulic Watertight Sliding

Ship: [Redacted] Needed: [Calendar Icon]

Project: [Redacted] Department: ENGINE

Account: 1201004 Deck Stores Budget WBS: OPEX

Port: [Redacted] Priority: D [Save As Template]

Cost Center: [Redacted] Ready To Be Authorized

Ready To Be Reviewed

Requisition Items Admin Info Remarks Documents Message File Attachments Status Custom Forms

Item	Type	Part Name	Part Number	ST	Document	Material ...	Qty	Unit	On-Han
New Item									
New Type-In Item									
Open Item									

**Requisition - New**

File Process Items Reports Help

Created Authorized Reviewed

USS Enterprise (ABS) \* ACCOMODATION AND DOORS \* Hydraulic Watertight Sliding Door No. 01

Req. No.: AutoGen Ship: USS Enterprise (ABS)

Project: Account: 1201004 Deck Stores

Port: Cost Center:

Equipment: Hydraulic Watertight Sliding Door No. 01 EQID: 0104-00001-00000831

Quantity: 1.00 PCS Type: Non Stock Ship: USS Enterprise (ABS)

Add to Hierarchy: ☒ As: Part

Part Name: A60 Steel

Part Number

Descript... Q- Search...

- ☒ Documents
- ☒ Equipment & Consumable Categories
- ☒ Financial Analysis Reports
- ☒ Inventories
- ☒ Job Planning
- ☒ Landing Order
- ☒ Maintenance Event
- ☒ Order
- ☒ Parts & Consumable Items
- ☒ Add Part/Consumable Item File Attachments
- ☒ Add Parts to Hierarchy
- ☒ Assign Consumable Item Criticality
- ☒ Change Destination Equipment while adding Parts to Hierarchy
- ☒ Create Consumable Items

# 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	Not required
Vendor required	Not required	For Review
Vendor Type required	Not required	For Authorize
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	Not required
Cost Center is required in line items	Not required	For Review
WBS is required in line items	Not required	For Authorize
Disable Requisition after export	No	
Department is required for Requisition	No	

# Approval Plans

# 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



# Document Approval Setup

File
Process
Reports
Help

Document:
Purchase Order

Identifier:
OIL

Ship:
☐ PO Company
☐ LOB Company
☐ Fleet
☒ Ships

WBS:

Universe Portugal

Cost Center:

Account:
☐ Account Category
☒ Account

Department:

Project:

Material:
☐ Spare
☐ Store
☒ Both

Notifications:
Primary Only

Service:
☒ All
☐ Selected

Setup:
☒ User based
☐ Role based

Effective From Date:
01-01-1970
☐ Retire

Approve By:
7 days
☐ Hide

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		



# Purchase Order Revisions



Bookmarks		Search																		
General																				
Ship: -- Select --																				
Document No.:																				
Priority:																				
Equipment: -- Select --																				
Account: -- Select --																				
Project: -- Select --																				
Insurance Claim: -- Select --																				
Cost Center: -- Select --																				
WBS: -- Select --																				
Type:																				
Item Category: -- Select --																				
Purchase Order																				
Status:																				
Company Warehouse: -- Select --																				
Consolidation Warehouse: -- Select --																				
Date Range																				
Created: -- Select --																				
Approval Date: -- Select --																				
Issue Date: -- Select --																				
Completed: -- Select --																				

Purchase Order - 5000334-1 - [0159-00001-00087078]

File Process Items Reports Help

Created

Submitted

Approved

Issued

Completed

Received

Delivered

Closed

Purchase Order Details

Receipt

Delivery

PO: 5000334 1

Fiscal Eff.: 05/15/2024

Cont Rls

Contract:

Shipyard PO

Identifier: Spares / Stores

Estimated Service Costs

Status

Original: 0.00

Delivery: None

Latest: 0.00

Receipt: None

Title: Hydraulic Watertight Sliding Door No. 01

Ship: ☒ Single ☐ Multiple

USS Enterprise (ABS)

Vendor: DVPrivate

Demo Vendor Eagle, Piraeus

Currency: US Dollars

	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

Materials

Services

Admin Info

Logistics

Terms & Conditions

Remarks

Status

Documents

Message

File Attachments

Part Attribute

Vendor Evaluation

Custom Forms

Company Remarks

	Itm	Rev	Type	Ship	Equipment	Part Name	Qty	Unit	On-Hand	Price	Disc %	Rem	Exc
<input type="checkbox"/>	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		
<input type="checkbox"/>	2	0	S	USSE	Electro Engine Telegraph	LARS PART	1.00	PCS	6.00 PCS	300.00	0.00		

Item Default

Account: 1201004

Deck Stores

Project:

Def Disc: 0.00 %

Auto Price: ☐

Budget

Tax Status

Local Tax: Exempt

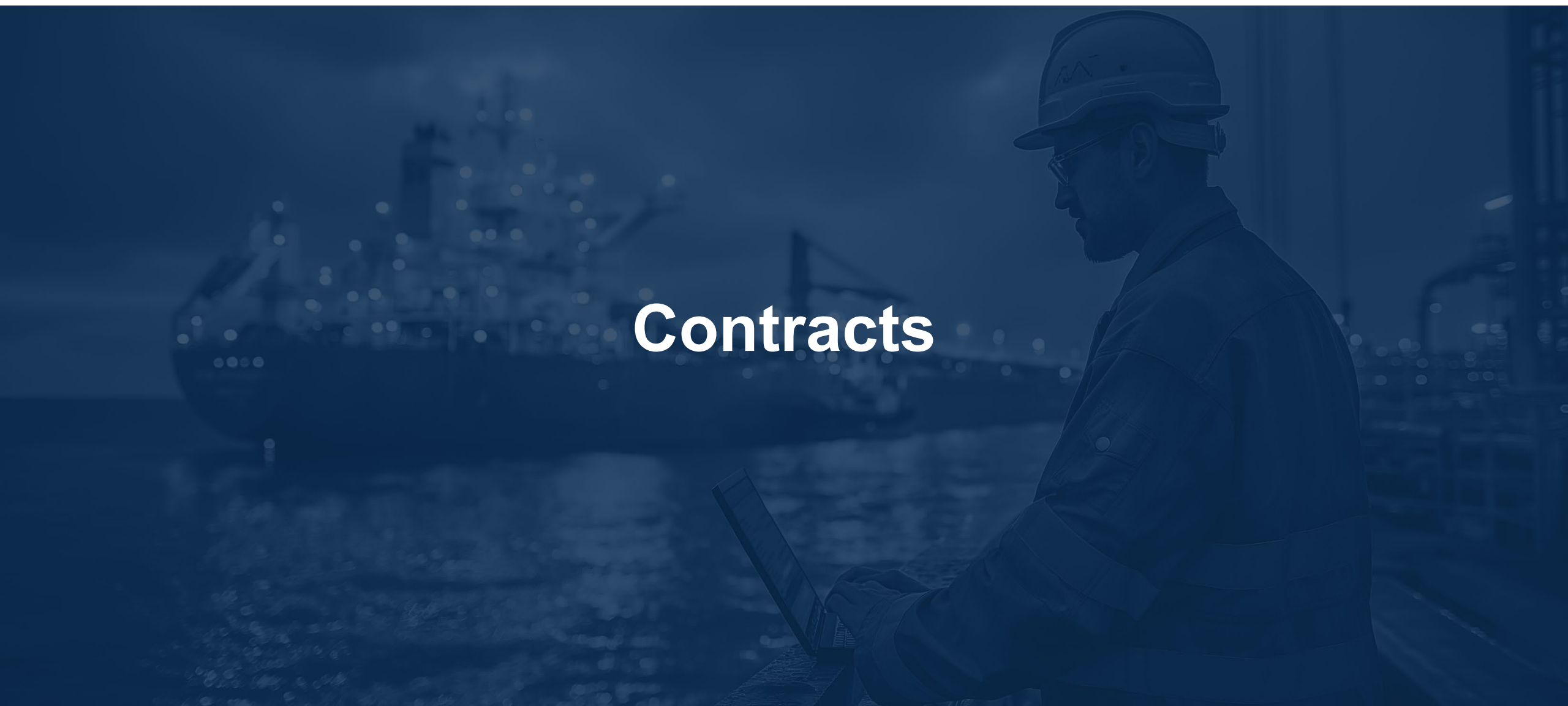
National Tax: Subject

Advance Details

Amount: 0.00

Date ...

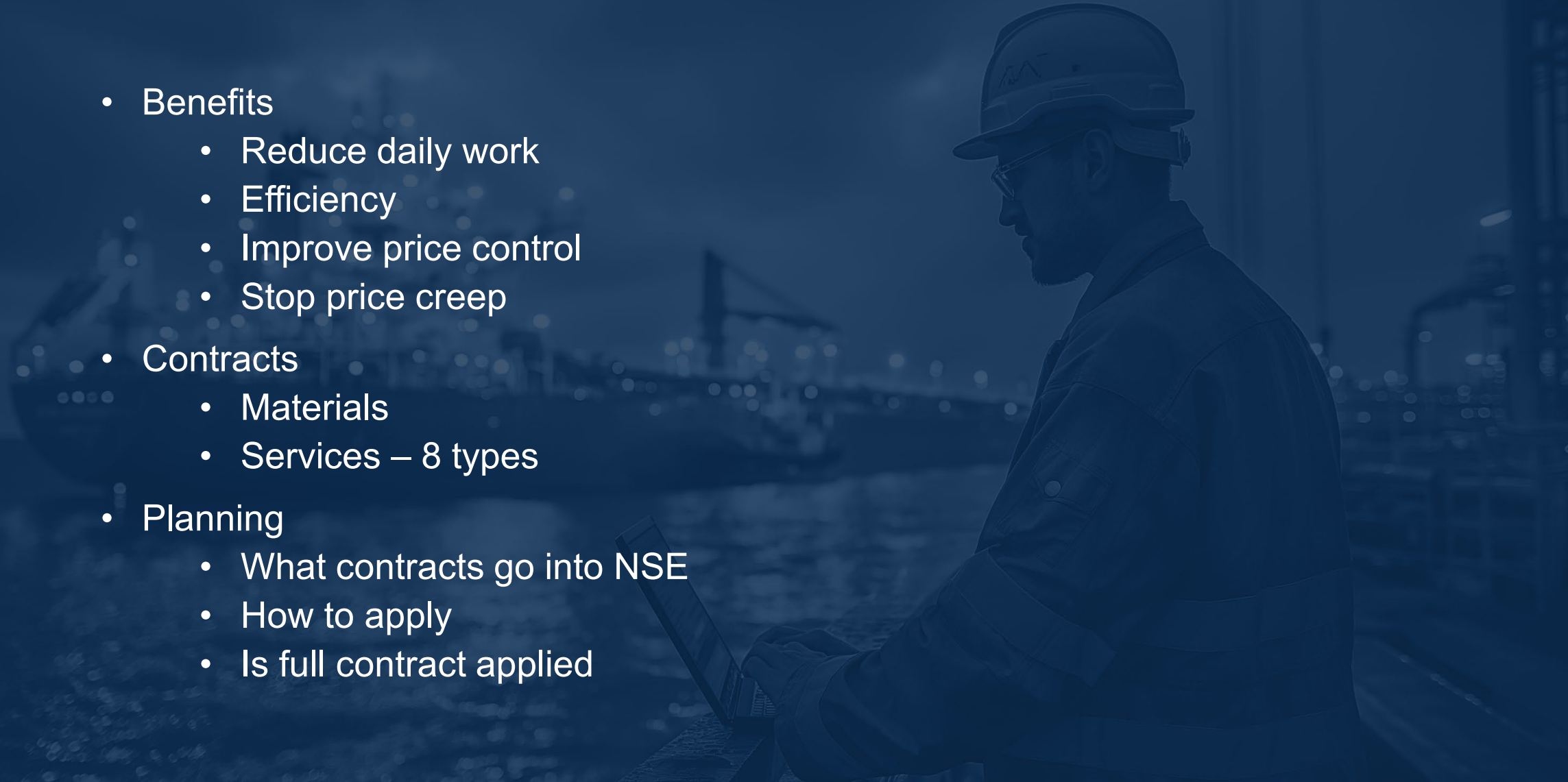
# Contracts





# 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



# Material Contracts

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

FileProcessItemsReportsHelp



Created

Submitted

Approved

Contract No.: PT-JT-01240

Valid From: 05-06-2024

Valid To: 30-06-2028

Expiration Tickler:

Title: [REDACTED]

Ships: Universe Australia

☐ Approved On-board

Vendor: 222130

Responsible:

Total Value: 0.00 USD

Calculate

Approver: Kramer, David

Approve By Date: 12-06-2024

Identifier:

View Plan

Contract Items

RemarksTerms & ConditionsMessageFile AttachmentsStatusRequisitionsRFQ'sPurchase OrdersCustom Forms

Vendor Zone

EuropeUSADefault

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

# Service Contracts

Service Contract - New

File Process Items Reports Help



Created Submitted Approved

Contract No.: 0  
Valid From: 26-08-2024  
Valid To:  
Expiration Tickler:  
Material Contract:

Contract Type: Fixed Price  
Ships: Fixed Price  
Fixed Discount  
Volume Price  
Volume Discount  
Recurring Service  
Maintenance Agreement  
Unit-based  
Installment

Title:  
Vendor:  
Responsible:  
Total Value: 0.00 USD Calculate

Approver:  
Approve By Date:  
Identifier:  
View Plan

Contract Items

Contract Terms Remarks Terms & Conditions

File Attachments Status SR's RFQ's Purchase Orders Custom Forms

# eProcurement





# 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

E-Mail Template - [5178-00455-00000002]

File Help

Template Name: Materials

To: \_\_\_\_\_

Cc: \_\_\_\_\_

Bcc: \_\_\_\_\_

Subject: Company Name - RFQ for Materials - \$shipName\$ \$rfqNumber\$

E-Mail Footer: \_\_\_\_\_

Concept: RFQ ☒ Default

RFQ ☐ Purchase Order

riables

Preview

Message Body File Attachments Associations

Paragraph Segoe UI 12 pt B I U T

Good day

Attached find a Request For Quotation (RFQ) from Company Name for the \$shipName\$ \$rfqNumber\$.



Kindly



1. Review the RFQ,
2. Update the excel spreadsheet with the information required in the yellow fields only. DO NOT change the format of the excel file or the file name.
3. Use reply on the original email incoming and attach the edited excel file and send the email.
4. Supporting information can be attached to the email above.

Thank you for your reply with a priced RFQ.

# eProc RFQ Sample

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

 [REDACTED] eProcurement <eprocurement@[REDACTED]>  
To  David Kramer 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] eProcurement Setup.


Good day Supplier - DK

Kindly receive an eProcurement Request For Quotation (RFQ) for the [REDACTED] RFQ number 0000001 from [REDACTED] ~~General Transportation~~ 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!

 Procurement Team

Kramer, David (ABS)

# 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

**AND....**

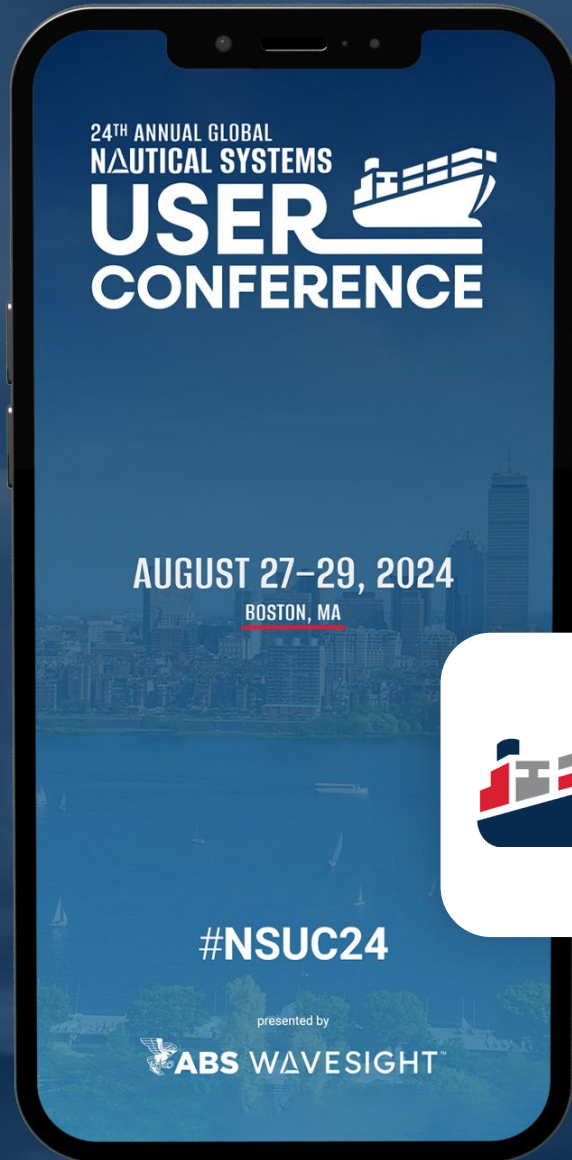
**THERE'S MORE....**



# Poll Question and Answer

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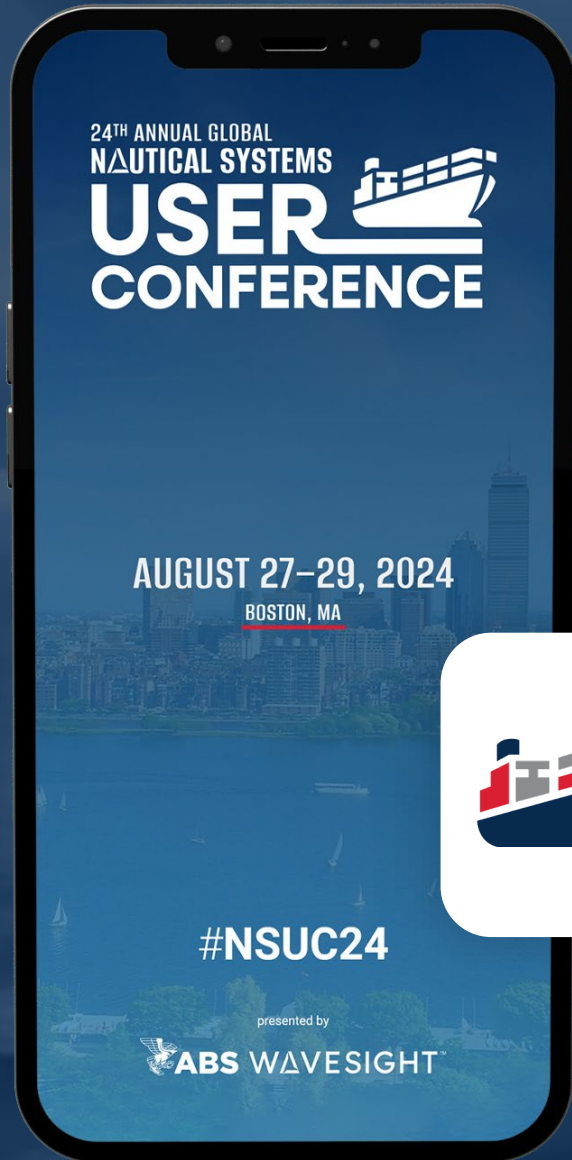


Use the mobile app for the  
**PURCHASING** poll, and  
your questions?

**#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)!

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# THANK YOU

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NAUTICAL SYSTEMS

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