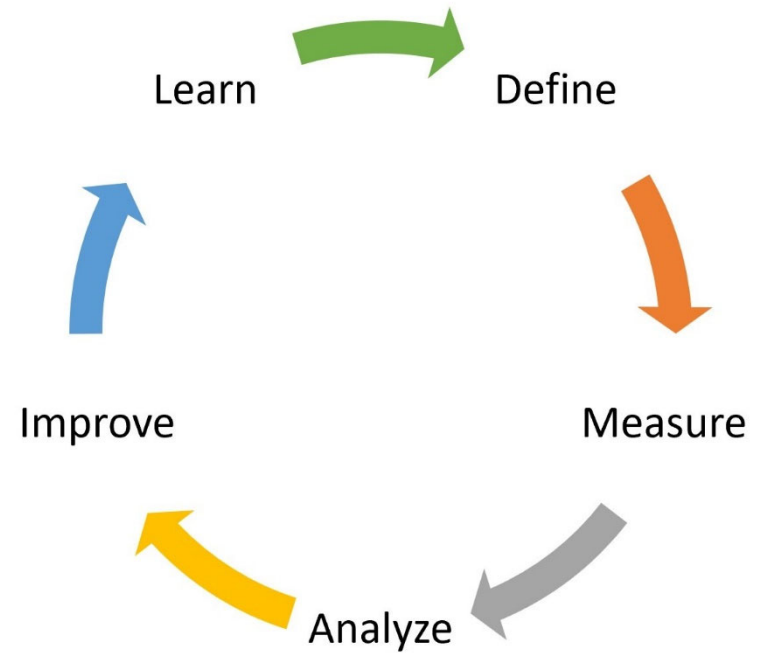
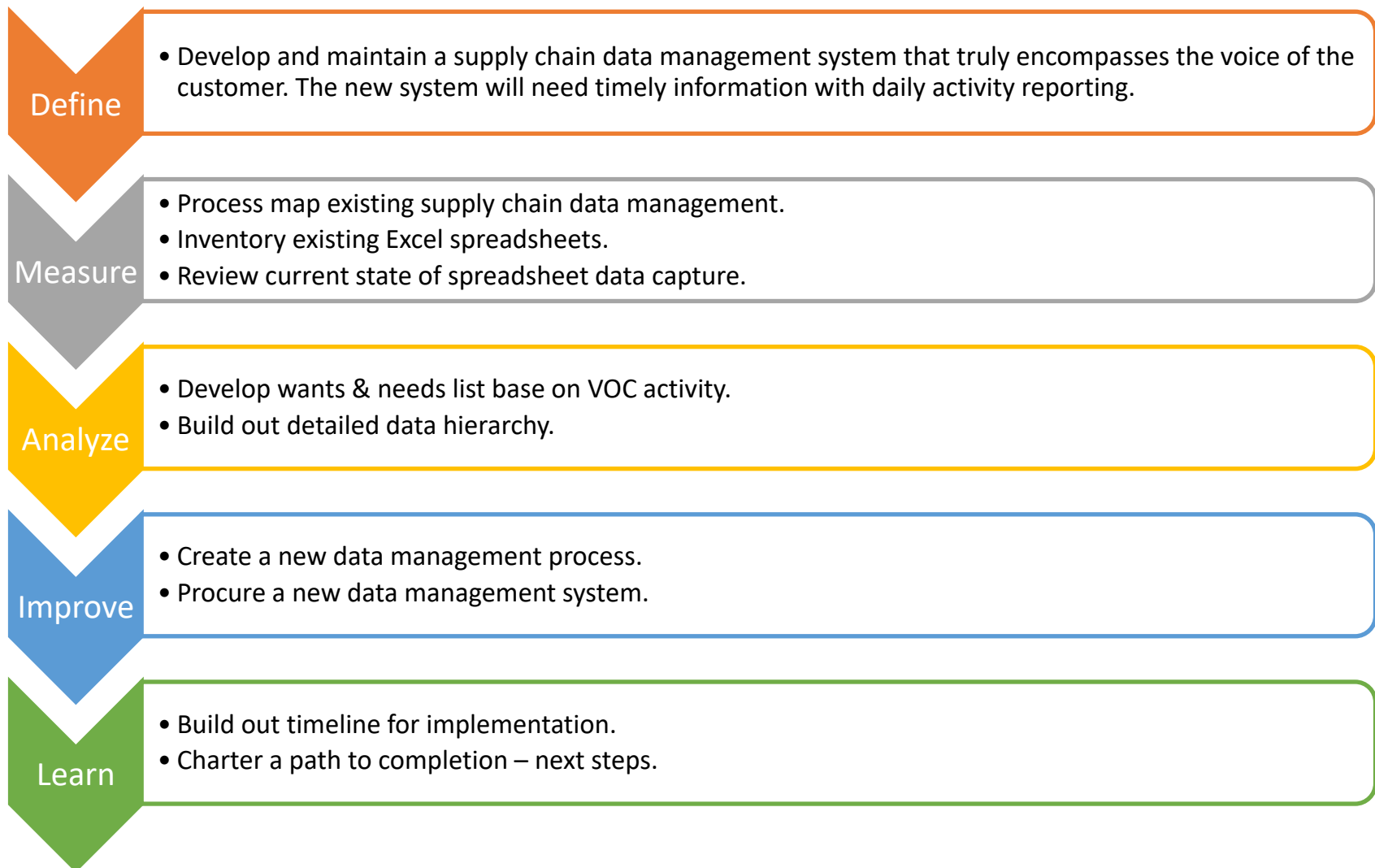


▶ PEXA

Case Study: Optimizing Supply Chain Data Management



Process Summary



Define

Charter: Optimizing Supply Chain Data Management

PURPOSE

- Develop and maintain a supply chain data management system that truly encompasses the voice of the customer. The new system will need timely information with daily activity reporting. Currently, redundant spreadsheets and information is used, it is paramount to remove waste from the process and streamline the overall data flow operation between organizations.

IMPORTANCE

- This effort is important now because although the Logistics team has a large amount of data, it lacks actionable and timely information. The Logistics department has a \$400MM budget with no visibility.
- Many of the processes are inefficient; this includes the data entry process, processing the data itself, and the analytics derived from the data.
- With continual data entry and redundant spreadsheets, the current system is rife with opportunities for manual error. The data should be valid the first time around.
- The current system creates long hours for both logistics and finance to ensure information is accurate and appropriately disseminated.

SCOPE

- All of JPM
- Spreadsheet Data
- VOC: JPM Scheduling & Credit, FP&A, Accounting, Logistics, Head of Commercial (Tom)
- Out of Scope = Deal Capture System, Transactions (Petroman) – including actualization of trucks.

RESOURCES

- Team Members
- Sponsor
- Team Leader
- Coach

DELIVERABLES (EXPECTATIONS)

- New database/system
- VOC documentation
- Detailed process map (with whole team) that shows the original state and future state after the project finishes
- Tie-in NBBC report
- Output feed to JPM
- Central Repository

METRICS

- Excel spreadsheets removed
- Amount of phone calls from NY (Less discrepancies)

SCHEDULE

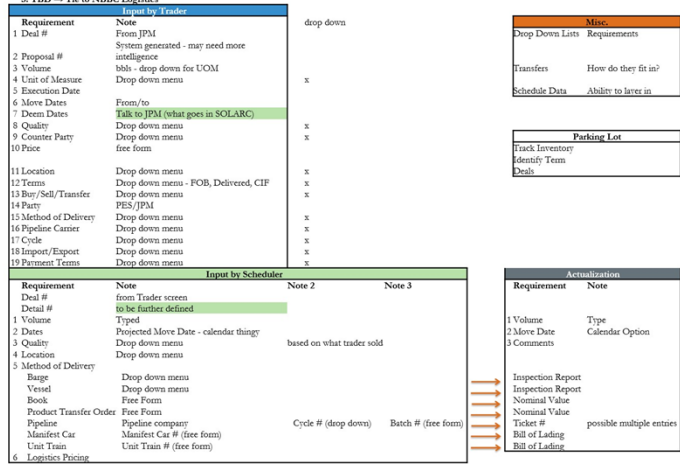
- Team Launch: January 22, 2014
- Deliverables Completed: March 1, 2014
 - With 60 day action plan for work that will be done in-step with the new/upgraded process

Analyze

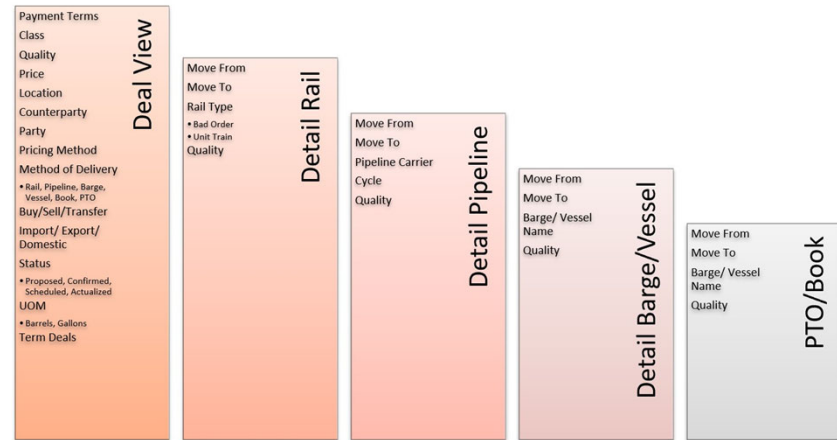
VOC: What Is Needed for Supply Chain Data Management?



- Overall Requirements:
 1. Many to 1 Relationship (detail #, also with Actualization)
 2. Link purchases and sales
 3. TBD -- Tie to NBBC Logistics



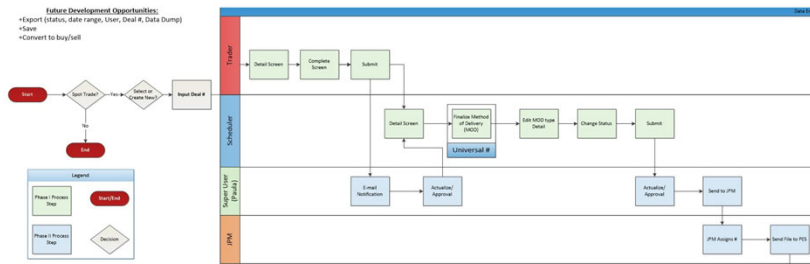
Proposed Data Hierarchy



Improve

▶ PEXA

New Process



▶ PEXA

Audit and Integrity Tracking of Data

WEN14TS9728

Summary

Deal	Audit Trail	Pipeline	Rat
Summary	User	Previous	Revised
250BXH changed field 'Class' from 'Gasoline' to 'Distillate'.	Z50BXH	Gasoline	Distillate
250BXH changed field 'Class' from 'Resid' to 'Gasoline'.	Z50BXH	Resid	Gasoline
250BXH changed field 'PricingMethod' from 'Fixed Price' to 'Platts'.	Z50BXH	Fixed Price	Platts
250BXH changed field 'DealType' from 'FOB' to 'Delivered'.	Z50BXH	FOB	Delivered
250BXH changed field 'Party' from 'JPV' to 'PES'.	Z50BXH	JPV	PES
250BXH changed field 'Party' from 'PES' to 'JPV'.	Z50BXH	PES	JPV
250BXH changed field 'Price' from '2345' to '23434'.	Z50BXH	2345	23434
250BXH changed field 'Party' from 'JPV' to 'PES'.	Z50BXH	JPV	PES

WEN14TS9742 Actualized Cude BP OIL INTERN... JPV Platts

WEN14TS9743 Closed Distillate BP OIL INTERN... JPV Platts

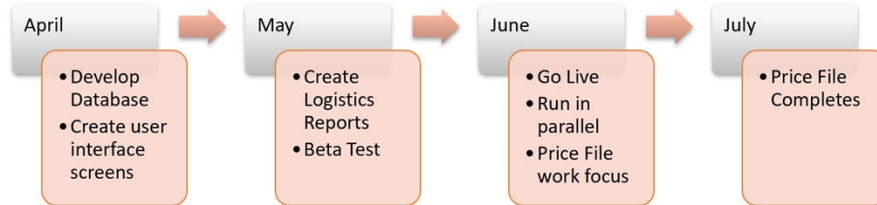
One Location for Data

▶ PEXA

Deal	Status	Class	Quality	Price	Counterparty	Party	PricingMethod	Volume	UOM	DealT
WEN14TS9724	Scheduled	Distillate	62 ULSO2	1234.98	BOURJA TRADI...	JPV	Fixed Price	789	Barrels	FOB
WEN14TS9725	Closed	Distillate	62 ULSO2	1234.45	BOURJA TRADI...	JPV	Platts	456	Barrels	FOB
WEN14TS9726	Actualized	Distillate	77 HS Heat Undy...	5678.76	BOURJA TRADI...	JPV	Fixed Price	12	Barrels	FOB
WEN14TS9727	Proposed	Distillate	51 ULSK	8976	BOMIN ATLAN...	JPV	Platts		Barrels	FOB
WEN14TS9728	Actualized	Distillate	LSFO 1%	23434	BP OIL INTERN...	JPV	Platts		Barrels	Deliver
WEN14TS9729	Actualized	LPG	77 HS Heat Undy...	890.78	BOMIN ATLAN...	JPV	Platts		Barrels	Deliver
WEN14TS9730	Actualized	Distillate	67 ULSHO	123.45	BARCLAYS BA...	JPV	Platts		Barrels	Deliver
WEN14TS9731	Confirmed	Distillate	LSFO 1%	6789.98	BARCLAYS BA...	JPV	Platts		Barrels	Deliver
WEN14TS9732	Scheduled	Cude			ATLANTIC TR...	JPV	Platts		Barrels	Deliver
WEN14TS9733	Scheduled	Resid	0.3 pct Nr 6 FO	345	ATLANTIC TR...	JPV	Platts		Barrels	Deliver
WEN14TS9734	Scheduled	Resid		123.45	BP OIL SUPPL...	JPV	Platts		Barrels	Deliver
WEN14TS9735	Confirmed	Cude			BARCLAYS BA...	JPV	Platts		Barrels	Deliver
WEN14TS9736	Scheduled	Gasoline		785	BARCLAYS BA...	JPV	Platts		Barrels	Deliver
WEN14TS9737	Scheduled	Distillate			BOURJA TRADI...	JPV	Platts		Barrels	Deliver
WEN14TS9738	Confirmed	Cude			BOMIN ATLAN...	JPV	Platts		Barrels	Deliver
WEN14TS9739	Confirmed	Cude			BOMIN ATLAN...	JPV	Platts		Barrels	Deliver
WEN14TS9740	Scheduled	Cude		3456	BP PRODUCTS	JPV	Platts		Barrels	Deliver
WEN14TS9741	Scheduled	Cude		12234.54	BP PRODUCTS	JPV	Platts		Barrels	Deliver
WEN14TS9742	Actualized	Cude			BP OIL INTERN...	JPV	Platts		Barrels	Deliver
WEN14TS9743	Closed	Distillate			BP OIL INTERN...	JPV	Platts		Barrels	Deliver

Learn

Build Out Timeline



Next Steps

- Build Back End of Database
 - Front end well-received, back end of database needs to be developed and tied to front end
- Outside Consulting Help
 - Hire consultant to work with in-house talent to develop database to suit needs of Logistics Department
- Reports
 - To replace existing spreadsheets.
- Training
 - Develop training, SOPs, etc. for end users of database to effectively use and utilize the new toolset
- Timing
 - How long will old spreadsheets run parallel to new system?
- Delivery of logistics pricing
 - Develop query or report to display Logistics pricing

[Learn more](#)

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