



## CLIENT PROFILE

**Name:**

**Top Maker of Digital Cinema Equipment**

**Industry:**

Manufacturing

**Need:**

Manage the daily information needs of a rapidly expanding manufacturing concern. Financial, marketing, MRP and CRM data must be made available in an easy-to-use form and delivered to various business groups.

**Results:**

Provided a Reporting Data Warehouse, data conversion and ETL processes, and a BusinessObjects Edge BI system that greatly improved information delivery and usability throughout the enterprise.

## BACKGROUND

Approximately 3 years ago, Client embarked on an initiative to improve the amount and quality of data available to the business for day-to-day operations, financial analysis, manufacturing planning and customer relations. A major implementation of Microsoft Dynamics AX was undertaken, with modules installed for accounting, MRP and CRM, among others. It soon became clear that although a large quantity of data was being collected for many of these functions, the usability and presentation of this data needed to be addressed.

Another initiative was begun to improve and streamline the Business Intelligence portion of Client's systems. Client decision makers chose SAP Business Objects as the business intelligence platform and worked to define a set of goals that could be accomplished quickly and with the best "bang for the buck." Innovent Solutions, a local SAP Business Objects partner, was chosen to implement the system and assist Client in planning for their expected future growth.

## BUSINESS CHALLENGE

Innovent Solutions worked closely with Client to define and execute objectives that included providing better Business Intelligence, making it easier to access Dynamics AX data, create a reusable reporting framework and maintainable reports, reduce or eliminate time-consuming manual processes, and enable Client staff to easily maintain and extend the BI system.

### **Provide better Business Intelligence**

Meetings were held with key stakeholders, and several items identified as needing improvement in the current BI/Reporting environment:

- **Provide Performance and Scalability**—To support projected growth, Client determined that a robust, scalable and maintainable BI system was necessary.
- **Improve Appearance**—Client documents, emails, Web site and other communications are based on a very specific Corporate identity. This involves the use of specific logos, colors and fonts. Any BI system must enable the use of these items in a quick and easy manner.
- **Simplify Development**—Microsoft Dynamics provides a reporting environment that is comfortable only for long-term AX developers. Client expressed a desire to have existing developers, power users and other business users use applications that enable rapid report development and deployment.

### **Make it easier to access Dynamics AX Data**

Microsoft Dynamics AX stores data in a very normalized data structure, which is typical among financial, MRP and CRM systems. To get at data quickly, a developer must be familiar with the numerous tables, views and objects that store this data, along with the names of columns for the actual data necessary.

Client desired to make this data available to a wider audience, in a more user-friendly format. Having little or no knowledge of the actual AX data schema, a non-developer should be able access, view and report on this data.

### **Create reusable and maintainable reports**

Client management expressed several needs regarding report design and development. These included:

- **Make reports reusable**—Report components and templates should be used to reduce report design time and to enable a more collaborative environment.
- **Leverage existing knowledge**—Some Client staff had preexisting experience with Crystal Reports. Leveraging that knowledge would reduce training costs.

- **Make reports maintainable**—Client expressed interest in creating development standards that can be applied to all report development projects. This will make sure that reports are easily maintained by future developers.

#### **Reduce time-consuming manual processes**

Currently, Client staff produces daily, weekly and monthly reporting packages using Microsoft Excel, while retrieving source data from stock AX reports, various on-screen displays, or even by word-of-mouth. Any automation of the data retrieval or creation of presentation materials would greatly improve productivity.

#### **Allow for easy maintenance and modification**

Any new BI system and implementation must be easy to maintain, easy to modify and monitor, and easy to extend. Impact to Client staff must be minimized—workload must not be substantially increased for existing system administrators.

## **SOLUTION**

The solutions to these business challenges were implemented using teams made up Client and Innovent staff. Using Innovent's proven implementation methodology, Innovent consultants were able to design, build, and deliver the BI system and applications required. User feedback and testing was handled by Client staff.

#### **Provide better Business Intelligence**

Client chose SAP Business Objects Edge Standard 3.1 as their Business Intelligence platform.

- **Provide Performance and Scalability**—Client's growth plans included an exponential increase in both the number of users and the number of reports used on a daily basis. The Edge system provides extensibility and scalability that will allow Client to accommodate these plans. Innovent provided rapid installation and configuration documentation to assist with adding new servers or instances as needed, as well as provided Microsoft Active Directory integration, allowing one stop setup of users and groups.
- **Improve Appearance and Simplify Development**—Crystal Reports, the primary reporting platform for Business Objects, enables the use of the fonts, logos and colors that are necessary for producing high-quality business documents and presentations. Crystal Reports also presents a common developer interface that most are familiar with. This familiarity also provides for a large network of Crystal developers who can be contracted should the need arise.

#### **Make it easier to access Dynamics AX Data**

Innovent Solutions implemented various methods to improve the access to AX data:

- Created a Business Objects Universe for inventory data
- Created a Microsoft SQL Server Reporting Data Warehouse, including tables and programmability objects for easy, denormalized retrieval of sales and inventory data
- Created initial and automated, daily ETL (Extract, Transform, Load) procedures that performed extraction and aggregation on AX data. The resulting data was accumulated and stored in easy-to-use tables by commonly used Client groups, such as monthly, weekly or customer region.

#### **Create reusable and maintainable reports**

Innovent Solutions created reusable report templates based on Client's common report designs, that are used as the basis for creating new reports. Common components were created that enforced layout constraints, such as fonts, logos and colors. Innovent consultants also mentored Client staff in advanced report design techniques.

#### **Reduce time-consuming manual processes**

Innovent's Reporting Data Warehouse design and ETL processes, combined with various Crystal reports and executive dashboards, significantly reduced the amount of time required to produce financial and executive reports, thus freeing employees to focus on more productive tasks. Along with this, Innovent built a custom forecasting system that enables MRP administrators to rapidly and accurately produce actual vs. budget comparisons.

**Allow for easy maintenance and modification**

Innovent provided mentoring, training and documentation to enable Client staff to easily administer and maintain the Business Objects system. User and group maintenance is handled through an existing Active Directory interface, while report folders and metadata is handled through Business Objects Web interface. Documentation and training was supplied to make it easy to replicate installation of the system, for future expansion.

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## THE RESULTS

In coordination with Client staff, Innovent Solutions created a comprehensive plan which was executed with success. Client has a high-capacity Business Intelligence platform in place, and has several custom reports running on a scheduled basis and consumed by the Business. Data is extracted and manipulated from the Dynamics AX system on a nightly basis and prepared for consumption by the Business.

A complete forecasting and budgeting system was built by Innovent and is used by the financial group to create yearly budget amounts for both customers and items. This forecast data is used in actual vs. budget sales reports.

The correct level of coordination, planning and testing achieved Client staff and Innovent Solutions consultants created the environment for the success achieved by this effort. Together, these improvements provided for greatly increased quantity and quality of data, and the ease of access provided to business users. Client is excited to have a new BI platform in place and is looking forward to continued use and expansion of its capabilities.



# INNOVENT SOLUTIONS

**Innovent Solutions**  
8001 Irvine Center Drive, Suite 400  
Irvine, CA 92618

Phone: 866.466.6868  
Fax: 562.262.2835  
Email: [info@innoventsolutions.com](mailto:info@innoventsolutions.com)

**Enabling Intelligent Decisions®**

Find out more:  
[www.innoventsolutions.com](http://www.innoventsolutions.com)

Innovent Solutions is a consulting firm, dedicated to the improvement of decision making through effective information management. We build systems that enable our clients and our client's customers to:

Find the information they want and need

Understand the context and meaning of information

Trust the information to be accurate and timely

Innovent Solutions is a privately held company headquartered in Los Angeles with offices in Minneapolis.

<http://www.innoventsolutions.com>

## How can we help you?

Innovent offers SAP Business Objects consulting services to help you empower your users to make effective, informed decisions based on trusted data and delivered in formats appropriate for the user. We strive to support your organization's efforts to provide new insights that can help users make intelligent decisions. We work with clients to assess and plan a business intelligence (BI) strategy, develop relevant visual representations of processes and performance, deploy dashboard tools, and create informative management and operational reports. Each of our engagements is crafted with the objectives of rapid implementation, quick return on investment, reduced risk and knowledge transfer to your staff. Whether you're looking for a complete solution, expert guidance for your team as they implement a system or a review of an existing system, Innovent can help. Our services include:

- ◆ Architecture and planning
- ◆ System Design, Development and Integration
- ◆ System Implementation
- ◆ Education