



# **Greaney Consulting LLC**

*Examples of Business Intelligence Solutions*

**Greaney Consulting LLC**  
**Your Complete Consulting Connection**

12 Sunset Creek

Guilford, CT 06437

Tel: (203) 458-0826 Fax: (203) 458-0836

Web: <http://www.greaneyconsulting.com/>

# Business Intelligence Examples By Business Area

## Information Technology

Converting from the client based Impromptu and PowerPlay to Impromptu Web Reports, Cognos Query and PowerPlay Enterprise server results in a considerable savings in both time and energy for IT staff members. When Cognos releases new versions of their software if your business has only the client products, the upgrade of each desktop can be a daunting project based upon the number of seats. We have customers that have pockets of 3 different versions of Impromptu. The challenge of upgrading users is a component of time, resources, training, and the number of production reports and catalogs. By taking the time to convert to a server-based solution, the administration effort is greatly simplified. From a user standpoint, most of the company population is report viewers. What we mean by this is the user simply opens Impromptu and runs the report. They usually do not modify the report or catalog. This type of user does not require the full Impromptu toolset that the client software provides. In fact it is more confusing for this type of user because there are a number of steps they have to perform to get the report printed. By converting this type of user to an Impromptu Web Reports environment, it greatly reduces the time and complexity to produce the report. The desired report sets show up in the user's inbox for viewing or are available to run by simply clicking on a hyperlink.

Deployment and administration of remote users is also much easier. How many times have the sales force come to town for a meeting, and dumped their PC's on an unsuspecting IT department for upgrades, fixes, add-ons, etc.? And, oh by the way, we need them back tomorrow! With the server based web versions, the zero footprint clients means no notebook maintenance.

Training is considerably easier.

- Every user knows his/her way around a browser by now. Anything that is wrapped in a browser is immediately less intimidating than a full client version.
- What is lost in full functionality is gained in ease of use. Remember the majority of users are simply viewing, or analyzing information. These tools are geared for this.
- People are more likely to learn because they can train anywhere rather than sitting in a training class.

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## Sales

We have had very good success implementing solutions in the Sales area. Sales information is a very logical area to concentrate on especially for analysis. Greaney Consulting has created many PowerPlay sales cubes that allow analysis by customer, product, sales channel, time, industry, project, etc. Any combination and detail of these dimensions is possible. The measures we have used are both in shipments and bookings. These are items such as quantities, sales dollars, margins, costs, etc. In each case we provide the data at a pre-determined level of summarization with automatic drill through to the specific details in supporting Impromptu reports. These detailed reports may be individual sales orders, shipment details, project accounting information, or general ledger transactions.

In addition to the reports mentioned above, we have produced many different kinds of sales reports.

We have a **shipping form** that accompanies a customer's product when printed, but also allows the user on the dock to drill through to produce **bar coded part labels** that are automatically driven by quantity on the order line. The users does not have to tell the system to print 5 labels, it prints 5 based on the amount picked.

Simple **order acknowledgements** and **customer statements** can be produced directly from Impromptu in many cases using the forms report capabilities.

We have created a **Cognos Query** based **sales rep inquiry system** which allows third party distributors to check the status of pending orders, verify shipments, perform product inquiries, and obtain key customer information.

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## Finance

The financial business area has been a primary focus area for our development efforts. Greaney Consulting has created custom PowerPlay solutions both for in depth analysis and also standard financial statement creation. The ability to look at a traditional statement such as a P&L in a non-traditional manner like PowerPlay allows for a tremendous amount of flexibility. Not only can the finance department drill up and down the chart of accounts to any level of detail, but statements can automatically be generated by entity, business unit, department, etc. The traditional process of retyping data or importing text files into Excel also is greatly reduced if not eliminated. PowerPlay and Impromptu data can be very easily saved directly into Excel .xls format. In addition, Cognos has released as a component of PowerPlay 6.6, a PowerPlay for Excel plug-in. The tool allows a PowerPlay cube to be embedded directly, and updated into an Excel workbook. Many of the same drill down and dice and slice capabilities remain in tact while allowing values to be cut, copied and pasted into other cells for additional calculations.

In addition to the standard **Balance Sheet, P & L,** and **Trial Balance,** we have converted custom Quiz financial statements from Visibility to PowerPlay. For example, a customer spent 4 days each month-end producing custom **Departmental Cost Statements** in Excel. We converted these to PowerPlay. Now from one model each department can view their own statements not only at month end, but throughout the month. Department managers can also drill through to the supporting transactions. In addition, the finance department can view any summarized combination of departments. We have applied the same concepts to produce custom **Revenue Statements** by product family.

Some other examples of financial reports are **Budget vs. Actual** statements, **Five Year Plan** reports, and **Current vs. Revised Cost** comparisons.

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## Purchasing

Maintaining a healthy supply chain is critical to the success of an engineer-to-order manufacturer. Greaney Consulting has used business intelligence to both streamline internal purchasing operations, as well as distribute information to vendors.

We recognize the project focus of our customers and have created **Project Commitment** reports to allow project management to see not only what costs have been charged to projects, but also what is on the horizon.

**Bar coding** is very important in the purchasing area so we have created Impromptu based **part labels.** Other examples of reports are: **Shortage reports, Open Po's by Buyer, Outstanding Purchase Reqs,** and many more.

Greaney Consulting has also created PowerPlay **vendor performance analysis** models that allow supply chain managers to measure product quality, on-time delivery, and product quality. Again, each of these cubes allows for drill through to the details.

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## Production

Shop floor production activity is at the heart of our customer's information requirements. The majority of Greaney Consulting's efforts in this area have been focused in labor reporting. Because labor is such a high cost component for our customers, analysis and reporting are very important. We have produced reports that show **labor costs** and **hours** by department, employee, jobs, and over time. Many different combinations of these reports exist.

In the materials area, we have produced many **inventory** reports, **WIP activity** cost reports, and **single level bill of material** reports. Many of our customers have taken advantage of a single level bill of material drill through report we have created. Each level of the BOM is presented with a drill through to the next lower level. At each level, there are also drill through links to check inventory levels, purchase orders, and more detailed part information. We have also produced **MRB activity** reports to aid material managers in measuring quality of both vendors and internal production.

PowerPlay analysis can also be applied to the production area. We have produced models that allow production managers to track **work order activity**. By looking at a summarized view of the work on the shop floor and then drilling into department activities, routing operations, and work centers. A better understanding of where the problems are begins to come into focus.

In summary, business intelligence is an important tool for our customers to gain a competitive advantage in their marketplaces. Through development and training, Greaney Consulting provides our customers with the knowledge and software to be successful. With the focus shifted to e-Business, we too have refocused our efforts to apply what we have learned and produced to make use of the Cognos web tools. All of our solutions are completely compatible with the web versions. We will continue to expand our knowledge in this area, in order to satisfy our goal to be **Your Complete Consulting Connection**.