



Ross Enterprise

Executive User Committee

2010 Ross Enterprise SIG Conference

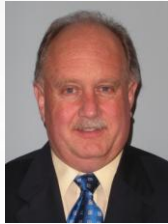
September 8th – 10th, 2010

Chicago, IL

Business Intelligence: Focus on the inherent value hiding in your ERP database

Ted Benham, Jenmar

Murray Fife, CDC Software



Ted Benham, Vice President of IT, Jenmar Corp.

Over 200 [dog] years experience in IT, with 150 of those in ERP; initial production recording on punch cards

Background in steel production and metals manufacturing

Currently leading efforts to install Ross ERP and EPM in areas across the globe

- Manufacturing facilities in 5 countries supplying ground control products to mining industry
- Using Ross ERP since 2001: A/P, A/R, G/L, POP, SOP, Inventory, Maintenance, Manufacturing
- Implemented EPM Sales in 2005, extending data warehouse to inventory, financials, purchasing, manufacturing



Murray Fife, Senior Solutions Consultant, CDC Software

Over 15 years of ERP (Enterprise Resource Planning) Business Software. Experience as a developer, implementation consultant, and pre-sales consultant.

Currently acting as a technology muse - presenting, demonstrating, and educating executives on the benefits of ERP technology.

Business Intelligence: Enterprise Performance Management

- Requires discipline during implementation and operation

Avoiding short-cuts when defining part codes: \$5,000

- Requires diligence with on-going attention to detail

Issuing credit note with inventory return: \$60

- Delivers valuable business insight



Ability to show profitability by customer, or by part code,
or by date with 99.9% inventory accuracy: Priceless

Executive sponsor beyond IT is critical.



What Data Is Needed to Generate Information?

Different perspectives

- What is necessary
- What is complete

The IT department understands data and information

CIO must see that data is collected for its intrinsic value

Jennmar Accounting Perspective:

- G/L had all information of value
- Other modules could generate documents and feed G/L
- Any errors could be corrected with a simple journal entry



What Granularity?

General Ledger

- Product groups – certainly
- Customer groups – not really
- Part codes – no way

Data in other modules provide additional value

- Inventory module
- Sales module
- Purchasing module

Use commonly defined business standards – CIO



Tools for Greatness

Ross ERP

- Modules provide codes for analysis
- Integration provides consistency
- Editing promotes data discipline

Ross ERP offers tremendous potential

Invest in your implementation: high value opportunities

Implementation deficiencies: address gradually over time



Challenges

Unavoidable Challenges

- Common business definitions
- Business changes
- Credibility

Success

- Business leaders determine success
- Start dialogue to build relationship
- Elevate leaders to intelligent information consumers



Potential Analysis Categories

Ross ERP offers opportunities throughout the system

- **Sales order types**
- **Product groups**
- **Customer groups**
- **Sales representative codes**

Look in the Codes section of each module

Consider use of user defined fields in many modules

Consider making changes to the system, only if needed



For Example

- **AR**

- Location Codes
- Customer Groups
- Cash Receipt Types
- Stop Codes
- Credit Hold Status
- Credit Limit Controls
- Terms Codes
- Salespersons

- **IC**

- Product Groups
- Product Classes
- Product Types
- Buyers
- Planners
- Requestors
- Inventory Status Codes

- **PM**

- Cost Categories
- Factory Locations
- Resource Groups
- Work Centers
- Job Control Areas
- Employees
- Labor Classes
- Labor Types
- Departments

- **User Defined Fields**

- Available in many modules
- Defined for your specific needs



Change Happens

- Customers / vendors merge or split
- Sales territories are redefined
- New product groups are developed

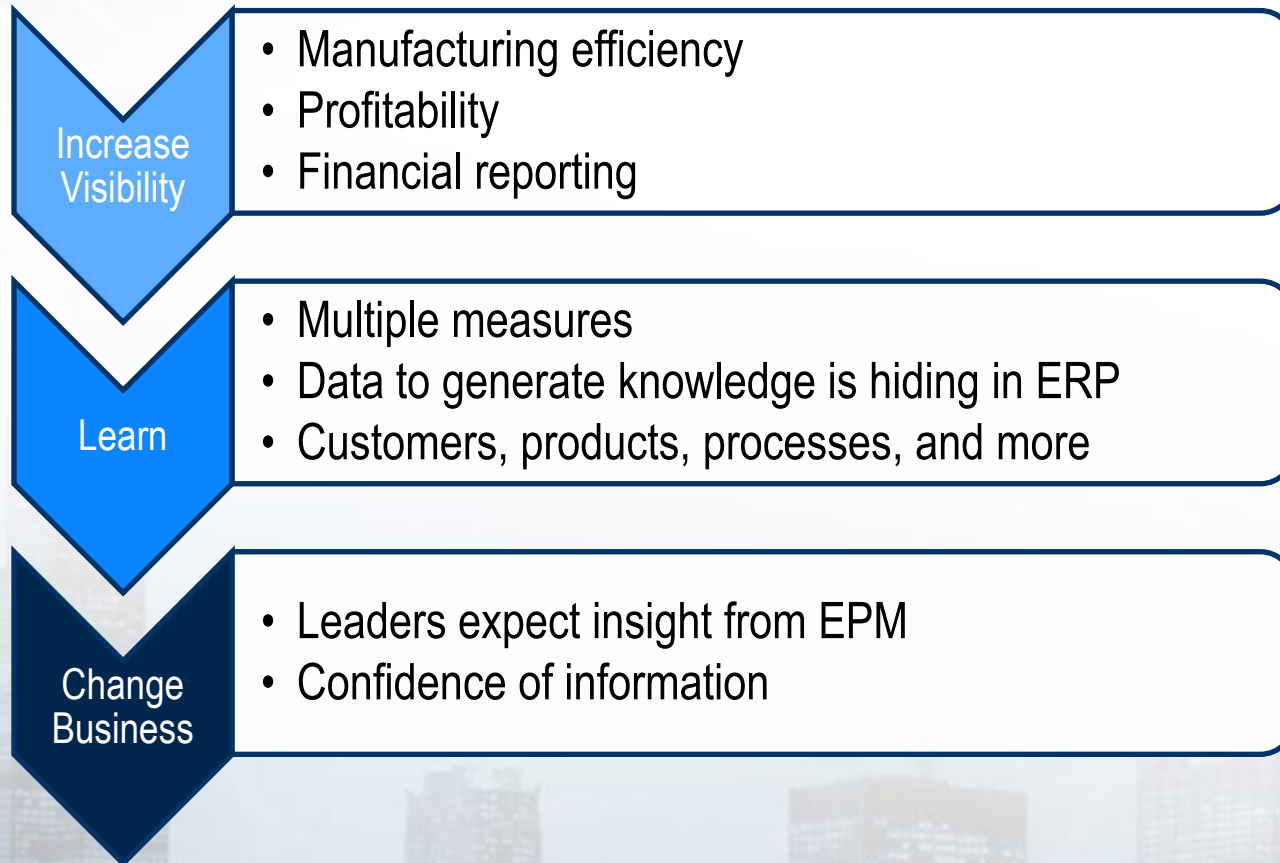
If your business is not changing, update your résumé

Comparing results over time is more difficult

Expect change and commit time to address it



Continual Increasing Value



Business Intelligence: Event Management Framework

- Requires knowledge of the database entities
Queries made against the database tables through SQL
- Requires knowledge of problems in the organization
Problems with inventory accuracy
- Delivers valuable business insight
Ability to watch for products that have not been received
within the expected time frame: Priceless



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Events Happens

- Products Expire
- Invoices get entered multiple times
- Products get lost in transit

**If your business is not monitoring, update your résumé
Managing exceptions becomes harder the longer they exist
Expect problems and invest time to address it**



What Data Is Needed to Generate Information?

Different perspectives

- What can go wrong

The IT department understands data and information

CIO must see that data is monitor for its intrinsic cost



Questions



Who to Contact

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