



## Project Profiles

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**Industry: General**

**Business: Corporate**  
**ERP Implementation/Migration**

**Business Issue:**

The company planned to migrate to a new technology platform, SAP, in order to improve technology support in the areas of Finance, HR, Supply Chain, etc. This endeavor required a complete understanding of the legacy business processes and technical architecture as well as the global impact this new technology platform would have on the organization.

**Technical Environment:**

The IT organization required a complete understanding of the legacy systems, technical and data architectures, in order to comprehend the enterprise impact of this technology migration. The IT organization was required to document how all existing application systems connected and communicated in regard to data flows to ensure that data was not compromised in the new implementation. Once the IT organization understood the effect that the new technology would have on overall environment, other possible landscape changes to further improve the environment could be considered and delivered as well.

**The Solution:**

Prior to planning and implementing this new technology platform, SAP, the enterprise needed a comprehensive view of all systems that would or possibly be affected by this migration. Additionally all data integration/reporting considerations within each of those application systems needed to be identified and presented. A graphical representation of the entire existing corporate application system landscape, delineating every connected system and data component was constructed. Once the view of the current environment was approved, a graphical representation of proposed environment, which replaced several systems and affected numerous others, assisted the organization to better plan and execute this major system migration. By exposing every data integration point that existed in the legacy environment, and how data integration would change in the new environment, greatly benefitted the IT organizations' ability to plan and execute the system migration and ensure that data will not be compromised or corrupted in the process.

**Result:**

The company gained complete understanding of the legacy environment and the proposed environment, along with the associated migration costs. The views were graphical and complete with all systems and data representations. The plan showed all technology considerations and cost estimates for the systems being replaced/changed, all data integration points being replaced/changed, all reports being replaced/changed, and all data conversions for migrating to the business data into the new data formats.



Business processes affected by the changing technological landscape were also identified and presented.

**Benefit:**

The corporation gained a complete understanding of the cost and impact of this migration upon its IT environment along with a detailed plan for success.



**Industry: Financial Services**

**Business: Financial Services (any business type applies)**

**Planning/Design of a New BI Reporting Platform / Environment**

**Business Issue:**

A major asset management company sought the development of a standard Business Intelligence (BI) reporting platform in order to empower their IT group to effectively and creatively exceed business expectations by utilizing validated information managed in a controlled and yet flexible framework for all BI reporting throughout the enterprise. The data present in the business reports was inconsistent and lacked of clarity. The environment was created organically due to the company's tremendous growth over the past six years. This environment bred low confidence in IT by the business. The company needed to take a step back and plan for their future along with selecting a technology platform conducive to their environment

**Technical Environment:**

The current IT reporting environment utilized many tools, including Crystal Reports and VB.NET, among others. The database environment is MS SQL Server 2005, but the company is not currently taking advantage of the Microsoft BI Suite that is available with MS SQL Server 2005. There are no documented data standards, naming conventions, governance or stewardship roles, as well as few testing standards to be followed.

**The Solution:**

The company desired to plan for their future by developing a VISION statement with Objectives based upon a list of both business and technical Requirements that had to be gathered in interview sessions with the business and IT communities. The Requirements and Objectives that created the VISION statement were then transformed into a Roadmap that contained a two-month plan, followed by defined longer-term initiatives, to totally transform the business reporting environment into a timely, consistent and effective platform for report development and distribution. Each Objective contained a strategic approach and associated strategic value, while each Roadmap action/milestone contained a project deliverable along with its defined intrinsic value to the enterprise.

**Result:**

The financial services funds management company had a short-term plan and a long-term plan to revamp the business reporting environment and create a place where IT and business could better work together and meet the business reporting goals of the enterprise as their financial services company continues to grow and mature quickly.

**Benefit:**

The company was prepared to be better able to produce timely, consistent and effective business reports in a dynamic financial business environment that was more controlled and predictable than in the past. This would ultimately improve the quality of the





information in the business reports and would ultimately reduce the design and development time required for report production and distribution.



**Industry: General**  
**Business: Data Management**  
**Business Intelligence Reporting Platform**

**Business Issue:**

The company was concerned with the viability of their reporting. The data was not centrally managed and controlled and had numerous data sources. Data was not well preserved and maintained. Individual groups produced their reports in their own format without any commonality to delivery, structure and content.

**Technical Environment:**

All data resided in an Oracle database as it entered the environment. The business users and analysts used SAS to perform all statistical analysis and reporting. The results of the statistical analysis and reporting efforts remained isolated to the individual or group, as the business users and analysts did not share much of the information.

**Solution:**

The concept of a business intelligence platform for reporting was introduced. The platform would standardize how data sources transmitted information into the group, and then how the data would be stored, managed and used within the environment. Many SAS-centric tools were included in the solution, as the business community and analysts desired to continue to use SAS as their tool of choice. SAS Data Integration and SAS Analytics as well as the SAS Enterprise BI Server were all part of the designated solution. SAS was the proper solution for this organization due to their inherent product knowledge and capability.

**Result:**

The initial impact was a reorganization of the company's business processes and the respective reporting groups in order to create efficiencies in data collection and reporting as well as creating specific business processes around data collection and reporting that did not previously exist. As the new and changed business processes enhanced the corporate environment, the additional SAS-centric tools were added in order to expand their data collection and reporting capabilities.

**Benefit:**

The organization was able to reduce the overall time and effort in performing data collection and creating the necessary. The reports were organized and documented, as the producers of the reports became more familiar with the actual source of their information. Streamlining the business and technological processes allowed them to create efficiencies in reporting and staff structures that did not exist previously.



**Industry: General**  
**Business: Enterprise**  
**Data and Technical Architecture**

**Business Issue:**

The company was unable to determine how each of the systems in each of their business units utilized and shared data. They were unaware of the integration points from one system to another, how much data was passed along those integration points, what type of data was actually passed from system to system, etc. The company was also unaware of the duplication in computing across the overall environment – for example, there were 5 different systems and sources for Supplier Information. These issues provided reporting inconsistencies and incalculable expense throughout the enterprise.

**Technical Environment:**

The heterogeneous environment included multiple database management systems, multiple finance applications, multiple HR systems, multiple systems for business reporting and business intelligence, etc.

**The Solution:**

Recommended a process tool to diagram the connections between each system as well as identify the various data sources and targets for each of the systems with their respect to the data components that cross each of the integration paths. The proposed solution architecture landscape diagram was able to highlight the inconsistencies of data usage throughout the corporation as well as the duplication of various types of computer systems themselves.

**Result:**

The corporation began the effort of system and data consolidation to eliminate duplications and inconsistencies as well as streamline the computer systems throughout the enterprise

**Benefit:**

The corporation invested in the data and systems analysis activities which would lead the elimination of redundant computer systems, hardware, software, databases and data files, as well as redundant points of data integration. The corporation will realize cost reductions of several million dollars annually and over time create reports with data that was consistent and accurate across the corporation.



**Industry: General**  
**Business: Enterprise**  
**Master Data Management**

**Business Issue:**

There was strong concern that every application defined product differently and used product information in various ways throughout the enterprise. There was no company standard for product definition nor was there a company standard on what constituted a “true” product. Each business unit considered different attributes as part of the definition of product and named products differently or used different sources of product name for naming their specific products – brand name, trade name, generic name, etc.

**Technical Environment:**

Data resided in Oracle. Many versions of the same database exist throughout the portfolio of application systems. There was little continuity on product information from system to system, much less organization to organization.

**The Solution:**

To use the definition of a product master and product master definition, which were the results of a Regulatory System project, to form the basis of an initial product definition for the corporation. Eventually, a Product Hub Project was initiated using the initial Regulatory product master definition as the basis for building the company product master. The Product Hub would contain all product information and provide the necessary systems with required product information for their processing needs.

**Result:**

The company benefited from the existence of a single source of product information for the entire corporation, and the information was centered within the corporation’s Product Hub.

**Benefit:**

The organization was able to centralize the definition and source of all product information across the enterprise through the Product Hub. It reduces application development time whenever product information is required, as well as forces the business units throughout the corporation to speak the “same language” in regards to product information. New reports now reflect “correct and accurate” product information which is acquired and used from one source.



**Industry: General**  
**Business: Enterprise**  
**Business Intelligence Shared Service Model**

**Business Issue:**

Business units were developing custom reports utilizing various corporate data sources and, in many cases, sourcing from heterogeneous technology platforms. The cost for the corporation to support these systems and technologies were significant. There were also data quality and sourcing issues resulting in many data inconsistencies in their reports.

**Technical Environment:**

Several business intelligence platforms including Cognos, Business Objects and MicroStrategy were implemented across multiple business units. Data integration and reporting integration were virtually impossible. Many business units had dedicated technology staff to design, develop and implement reporting applications. Other business units did not have such a technology staff to perform report development and implementation and as such required an outside organization to develop and implement developing new reporting applications to support business requirements.

**The Solution:**

The concept of a Business Intelligence Shared Service model was socialized across the organization.

**Result:**

Business units throughout the corporation had a common group to support the design, development and implementation of new reporting applications. A single BI platform was adopted, Cognos, for all new development. The realization of a single reporting platform would be recognized over time. Some technology staff from the business units was absorbed by the new BI Shared Service Group. The Shared Service Group developed Service Level Agreements (SLA's) for all assignments that might occur, and also developed a Services Catalog so that the business units knew what activities and support that the Shared Service could provide. The BI Shared Service was able to better manage metadata and other data components and began to persist the use of a single source of information for many data requirements, thereby gaining data consistency in the reports.

**Benefit:**

The corporation realized cost reductions in hardware, software, integration efforts, and technical staff. Reports were produced that were consistent among all business units. Technical support for the reporting environments and the help desk were eventually moved to the BI Shared Service Group to streamline the technical efforts, reduce costs, and gain efficiency from future vendor contracts due to economies in scale.



**Industry: General**

**Business: Finance**

**Data Warehouse/Enterprise Reporting**

**Business Issue:**

A major global conglomerates' finance organization realized that there was little synergy among their many financial applications. Revenue, expenses, and financial statement processing and reporting were not well integrated. It was extremely difficult to successfully complete timely and accurate monthly, quarterly and annual corporate closes. Many of the month-end, quarter-end and year-end business processes were not well monitored and governed. There was widespread inaccuracy and "lack of truth and consistency" within the published financial statements and the respective company results.

**Technical Environment:**

All financial data was maintained in separate and distinct databases, even though the databases were represented in one technology. No business process tool was used to track and govern the financial processes for this corporation.

**The Solution:**

The company built a financial data warehouse in order to integrate the many financial areas and provide enterprise reporting capabilities. Due to a cost concerns, the warehouse was built in distinct modules. The first module contained an overall system and database design that could be implemented with the first application module, expenses. This system model was used for all future module implementations. Expenses, the first module developed and implemented, was the financial area of primary concern due to its' lowest consistency and truth in reporting. The system and database had to be designed so that subsequent modules (revenue, financial statements, miscellaneous processing) could continue to use this original system and database design. Over an 18 month time period, all modules were designed, developed and successfully implemented. All associated business processes were changed, along with the implementation of process governance and monitoring to ensure success.

**Result:**

The corporation was able to report on financial information on a timelier basis and with truth and accuracy never before seen in the companies' history.

The corporation was finally able to report accurate and truthful financial information. The business processes, which were changed in conjunction with the new systems implementations, helped control audit and compliance considerations. Recent financial statements were re-created and published as restatements of earnings. All past company



financial problems were eliminated and now controlled for the future. The company could now re-establish themselves as a market leader.