

NGS Offers OKI Bering a Suite Deal on Business Intelligence

by Erin Bradford

Imagine throwing 18 basketballs into one hoop at the same time. How many of them do you think will score a basket? Well, probably none, and that's exactly the problem that OKI Bering was having with managing its warehouse of customer data. One marketing employee was responsible for running reports and sending data to 18 sales representatives, and she was beginning to get overwhelmed with all of the requests. In fact, the list of tasks for the marketing analyst was steadily growing, and she was sending many of the requests to the IT team to be processed, which led to an almost six-month backlog for that department. OKI Bering's IT department was getting overloaded and needed a way to cut out the middleman and get data directly to the sales members. But after implementing New Generation Software, Inc.'s NGS-IQ, a data-warehousing and business-intelligence (BI) solution for the System i, the company was able to cut down on the data request backlog and arm its salespeople with information at their fingertips.

OKI Bering, a worldwide master wholesaler of welding, safety, and industrial products, was founded in 1937 and is headquartered in Cincinnati, Ohio, with 12 distribution centers in the U.S. OKI owns a 9406 model 825 System i running V5R4 with 215 users in-house and about 140 connected clients. In addition, the company services countless web users from its website, which also runs on the System i.

In the spring of 2004, OKI Bering management decided to put more data into the salespeople's hands to try to cut down on that backlog for the technology team. "We wanted the project to provide flexible methods to review users' desired data," says Kim Mahoney, director of information systems for OKI Bering. The sales team needed data on customers, including recent purchases, frequency of purchases, and general types of purchases so that it could pinpoint customers' interests without wasting time telling them about products they had no desire to buy. To get that information to the sales force, Mahoney explains that the company needed "the ability to get data to the rightful users, and we wanted to be able to set up a stable set of report templates. In addition, we needed the option to include data from databases other than DB2."

OKI Bering's management formed a committee to help find a product that would fit the company's needs. It recruited committee members from the business areas that most often look for data: sales, marketing, customer service, accounting, warehouse management, and IT. The technology team members helped to determine what kind of downloads the solution



Kim Mahoney (right front) and the IT staff at OKI Bering

would need to provide to its users, and the marketing analyst was in charge of making sure that the chosen solution would meet the company's documentation requirements. The rest of the team would explore the options suggested by its IT and marketing members and then present its choice to OKI Bering's board. The committee reviewed three potential solutions in person and via webcasts. After investigating the various products, the committee found that the NGS-IQ suite was the best-fitting solution for three reasons: ease of use, summary and drill-down capabilities of the product, and price.

NGS-IQ, in addition to its data-warehousing features, lets users customize their reports by entering variable criteria for selecting records and calculating fields. Authorized users working locally or remotely can generate Excel workbooks and sheets and access tables, Word documents, OLAP presentations, drillable HTML reports for web presentations, and PDF files. NGS-IQ includes e-mail and FTP functions to support information sharing, and provides System i developers as well as Microsoft Office and web users with an environment where they can access and share information stored in DB2 databases. The NGS-IQ BI suite provides integration between DB2 on the System i and

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Microsoft Excel, Access, Word, and other Windows applications. In addition, the solution can simultaneously support Windows, web-browser, and 5250 users without requiring additional servers, middleware, or databases.

NGS also offers customers a starter kit of predefined dashboard templates for customizing the way that users view data. Report development is simplified through the use of a wizard that helps users join files correctly, and the software's metadata feature lets users predefine joins between DB2 files and assign more descriptive names to DB2 files and fields. OKI's committee liked the idea of a product running on the System i but wanted it to be able to include data from non-DB2 databases, too. NGS-IQ is more than capable of providing the multidatabase linkup, so the solution was high up in the running as the potential winning solution.

NGS presented the NGS-IQ suite to the OKI Bering committee members at its headquarters in Cincinnati. After hearing NGS's presentation, members were impressed with the product's apparent ease of use. Two aspects of the suite really stood out to the committee: the SmartView module for handling customer data and NGS-IQ's security module. SmartView helps users transform reports into portable, multidimensional presentations with drill-downs, critical-value highlighting, and charting and graphing features. SmartView lets users present, but not change, the data that underlies their presentations, so managers can trust that what they are seeing is based on actual business data extracted directly from the System i. "We also had some information that shouldn't be shared with all users, which required field-level security," explains Mahoney, so the solution's security module was a much-needed feature.

NGS-IQ had one last secret weapon that none of the other presenters had — a date file for date handling and conversion, which enables users to define how they need dates in the production DB2 database converted to better support sorting, selection, and presentation. The date file also enables conversion between dissimilar date formats and eases calculations. And so, the committee selected NGS-IQ as its solution to implement.

OKI Bering purchased the suite directly from NGS in October 2004 and was able to train users and implement the entire solution by June 2005. The project team presented the solution at the company's employee conference in August. As far as training on the new system, OKI Bering held two full training sessions in Cincinnati for IT and department users and subsequently sent OKI Bering's president, a regional sales representative, and a West Coast branch manager to NGS' Sacramento headquarters for additional one-on-one training.

Mahoney and her team decided to keep implementation of the solution simple at first. "While no customization was required for legacy applications to integrate with the new system, we elected to use the metadata functions each night to extract files in order to give some stability of results. Creating extract files avoids contention and creates data stability in addition to making the field names more user friendly."

The only hurdle to implementation was developing the inter-

nal documentation of OKI Bering's processes. Explains Mahoney, "Getting our team to complete the documentation was a challenge. All parties involved were busy with their daily tasks and doing this in addition. We finally split the documentation tasks up among various users and got it done." Luckily for OKI Bering, "NGS personnel have been terrific in supporting their product. Questions arose with security and the date conversion functions, because OKI-Bering needed to understand NGS-IQ's security features and determine the best way to set up security, but now security is available over the database, queries, output files, and features. NGS handled all of our concerns quickly and professionally. Support has been stellar." Now, OKI Bering has members of sales, finance, marketing, management, purchasing, and customer service all using the suite with great results.

For the IT staff, three of the biggest benefits of the solution have been the added security, support for date conversions, and the software's general ease of use. Users with different authorities can run or copy standard query templates without accessing each other's data. "This keeps the expected environment of templates from changing and makes it easier for the users to know what is coming," explains Mahoney. "Also, we wanted to be able to restrict data access so each sales representative could see only their own territory information, while corporate personnel could see everything. This was easy to accomplish, and as a side benefit enabled us to create a single query and then restrict who can view which fields and records." Another perk was the solution's integration with Excel. The client module streamlines the direct output of NGS-IQ queries to Excel spreadsheets in addition to providing flexible runtime record selection.

Mahoney has been thrilled with the results from using NGS-IQ. "We've achieved putting the data in the hands of our users. They are thinking of new ways to use it all the time. It is definitely a powerful, easy-to-use tool. The sales force is now able to extract data to share with the customer on calls with them." Also, the IT team has been able to accomplish tasks using NGS-IQ that would normally require them to write more code.

OKI Bering has seen business changes in many areas because of the improved data warehousing. "The reduction in the IT backlog was very pleasant. Also, the sales force and executives like NGS-IQ's SmartView because they can see things at a summary level and drill down where further consideration is needed. This product also facilitates changing the way the data is viewed by dragging and dropping fields. This is very powerful. We continue to add templates and are working toward establishing departmental experts in using the product." Currently, Mahoney has seen the greatest improvements in customer service, marketing, accounting, and sales because of implementing the NGS-IQ suite.

And as far as that marketing analyst is concerned, she's also greatly benefited from the solution. Even though she is still asked to pull data for the sales team on occasion, she can now process these requests more quickly and with great ease, and that's a score for everyone involved. ■

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