

Information Builders enables agile information solutions with business intelligence (BI) and integration technologies. WebFOCUS – the most widely utilized business intelligence platform – connects to any enterprise system or application and enables simple and intuitive interaction with information.

Staples Promotional Products

Snapshot

Organization

Staples Promotional Products, based in Overland Park, Kansas, specializes in the development, promotion, and extension of branded merchandise.

The Challenge

Establish an efficient reporting environment that can accommodate a broad range of users, so the IT department can get out of the business of continually writing reports.

The Strategy

Replace a cumbersome legacy reporting system with an efficient, parameterized reporting system; extend the software infrastructure via a Web-based architecture that simplifies maintenance.

The Results

A common reporting environment for creating everything from sales reports to financial statements. WebFOCUS serves developers, power users, end users, and customers with flexible, user-friendly tools for information analysis and delivery.

Information Builders Solution

WebFOCUS, Professional Services, Education.



Staples Promotional's Chet Brown, Shelli Osterle, John Wuelzer, Mark Sullivan, and AJ Watson.

Reducing the Cost of Enterprise Reporting

Staples Promotional Products Adopts WebFOCUS as Its Corporate Standard

From creating the first eStores to developing its own line of apparel and headwear, Staples has been a leader in the branded merchandise industry for more than 50 years. Approximately 350 companies in the Fortune 1000, along with numerous small and midsize companies, have chosen Staples to create and sell custom merchandise such as mouse pads, shirts, hats, key chains, and coffee mugs.

According to IT Director Mark Sullivan, what makes Staples unique is its "cradle to grave" approach to promotional merchandising. For example, in addition to creating and distributing branded products, Staples operates call centers and manages Web stores on behalf of its customers. The company also maintains a 600,000-square-foot distribution facility and hosts 170 Web sites to promote, sell, and distribute custom products for its customers.

“Once we considered the licensing structure, the functionality, and the support, WebFOCUS was a much better fit for us. Information Builders does not charge for end users who simply obtain standard reports, and WebFOCUS ReportCaster makes it easy to send those reports by e-mail.”

Most of these services are driven by technology, which places Sullivan's team at the center of the action. His staff of 22 IT professionals handles application development, technical services, and network administration for about 1,000 employees. Given the high ratio of IT personnel to the staff as a whole, he is always on the lookout for ways to maximize efficiency. Enterprise reporting is a prime example.

“When it comes to report writing, we had become our own worst enemy,” Sullivan admits. “Some people were writing DB2 reports on the AS/400. Others were using Impromptu from Cognos. Still others were developing Microsoft Access databases, analyzing data in Excel, or creating Web forms for querying data. There wasn't a lot of consistency.”

Sullivan wanted to help the IT department get out of the business of continually writing reports. This implied finding a set of reporting tools that was easy to use yet comprehensive enough to meet all types of corporate requirements. “Our objective was to drive down the cost of reporting by supplying end-user reporting tools to the entire organization,” says Sullivan. “This implied a reporting environment that was accessible to a broad base of users – not just application developers or systems analysts.”

A New Identity for Reporting

At the time, Sullivan's team was mainly using Cognos Impromptu for its business intelligence (BI) initiatives. In early 2004, Staples evaluated a newer product from Cognos called ReportNet, along with BI tools from several other vendors – including WebFOCUS from Information Builders. Led by John Wuelzer, a database administrator at Staples, they quickly determined that WebFOCUS could best deliver reports for finance, sales, client services, and other functions. They particularly liked WebFOCUS' unique approach to parameterized ad hoc reporting, along with its mature facilities for report bursting and distribution.

“With Cognos, we would need to purchase three or four different products to achieve the same level of functionality that we could get from WebFOCUS, which would have more than tripled the cost,” Wuelzer says. “Once we considered the licensing structure, the functionality, and the support, WebFOCUS was a much better fit for us. Information Builders does not charge for end users who simply obtain standard reports, and WebFOCUS ReportCaster makes it easy to send those reports by e-mail.”

Rolling Out the Software

Staples implemented WebFOCUS in April 2004. Wuelzer worked closely with Information Builders' Professional Services to install the software on an IBM blade server running Microsoft Windows 2003 operating system. They also established a data warehouse for end-user reporting using Microsoft SQL Server 2000, and used WebFOCUS to replace about a dozen field sales and commission reports that had been created in Cognos Impromptu.

“We had no trouble learning the basics and converting the existing reports in a very straightforward manner,” recalls Wuelzer. “WebFOCUS does much more than we originally realized, which extended the implementation cycle, but the additional features and functions made it well worth the extra effort.”

“WebFOCUS has become our corporate standard for enterprise reporting. The software is ideal for organizations that want to place responsibility for reporting in the hands of business users. It is a great product that is instrumental for many activities.”

To stay on schedule, Staples enlisted the Information Builders Education department to train a number of developers and power users to use the WebFOCUS software. “The local training was outstanding,” says Sullivan. “We have conducted on-site classes on several occasions, helping the staff learn everything from how to use parameterized reports to how to develop new applications with WebFOCUS Developer Studio.”

Smart Division of Labor

Staples has established a hierarchical model for helping the entire organization adopt the WebFOCUS software. Wuelzer is responsible for making sure the data is available. To keep the data warehouse current, he creates and monitors ETL procedures that transfer operational data from a DB2 database on Staples’ AS/400 computer into the SQL Server database. Under his jurisdiction, seven software developers have been trained to use WebFOCUS Developer Studio to create business intelligence applications for accounting, inventory control, e-commerce, client support, and other departments.

For example, Shelli Osterle, a senior data analyst in the client support services group, has been using WebFOCUS to create consolidated business summaries that reveal service metrics such as total dollars spent, total number of products shipped, and product returns. She plans to use WebFOCUS to create and deliver about 1,200 of these reports per month, along with 80 or 90 quarterly summaries. Recipients will include marketing personnel, program managers, senior directors, and sales representatives – all of whom can tailor the report contents to their needs. “Formerly, we had to step in to modify reports whenever a user wanted something as simple as a specific date range,” Osterle explains. “With WebFOCUS, users can make these changes by themselves. They are extremely happy and my team is much more productive, since we are no longer bogged down with so many daily requests.”

Osterle says Information Builders is always eager to know what they can do to make the software better. “Most vendors are so set on their own agendas that they forget that their products are built for customers,” she says. “Information Builders is an exception – they seem genuinely interested in what they can do to make the product better for us, and they are extremely approachable at user meetings.”

ReportCaster

Organizations use ReportCaster, the WebFOCUS report delivery engine, to schedule reports and distribute the results in a variety of formats. Control over scheduling can be either in the hands of a single administrator or spread among any number of preauthorized end users. The content, timing, frequency, format, and even method of distributing reports can all be easily managed and customized to meet individual needs.

Find Out More

To find out how our solutions can help your company succeed, talk to an Information Builders representative today. Contact your local Information Builders office, visit us at informationbuilders.com, or in the U.S. and Canada, call **(800) 969-4636**.

Excellent Excel Integration

According to Osterle, one of the things that makes WebFOCUS so useful is its tight integration with Microsoft Excel. Business users can deliver data through interactive spreadsheets that preserve styling, drill-downs, formulas, graphs, charts, and even PivotTables. As an organization that uses Microsoft Excel quite heavily, Staples finds this integration extremely useful.

Sullivan appreciates the bursting features of WebFOCUS ReportCaster, which allows developers to parse lengthy reports and distribute specific portions to designated users. "ReportCaster makes it easy to distribute weekly sales data to all of our sales representatives," he says. "Pushing information by e-mail increases the take-up rate for this information."

Enforcing Reporting Standards

Thanks to these and other advanced functions of the software, Staples is witnessing a gradual adoption of WebFOCUS for many types of information analysis and delivery – from generating financial statements to routing trouble tickets. "WebFOCUS has become our corporate standard for enterprise reporting," says Sullivan. "The software is ideal for organizations that want to place responsibility for reporting in the hands of business users. It is a great product that is instrumental for many activities."

Staples is also using WebFOCUS to develop external reports for customers who need to access information about activity at their Web stores. For example, one of the world's largest consumer electronics retailers relies on Staples to host a Web store offering branded merchandise such as T-shirts, hats, and coffee mugs to its employees. Store managers can connect through the Internet to generate reports that list recent shoppers, total visitors, promotions redeemed, orders shipped, orders invoiced, inventory reports, and other current information. "About half a dozen internal users from each of our hosted sites regularly access this information – about 1,000 users total," says Sullivan.

Despite the obvious progress with the new reporting technology, Sullivan believes his organization has only scratched the surface of WebFOCUS' potential. "Our real return on investment is just beginning to be realized," he speculates. "We are driving all new reporting activities through WebFOCUS, and we want to get to the point where every employee in the company has his or her own set of metrics that are available through personal portals. Information Builders has the business intelligence tools we need to make this happen."