

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.

Associated Food Stores

Snapshot

Organization

Associated Food Stores is an independent retailer-owned warehouse based in Salt Lake City, Utah.

The Challenge

Eliminate haphazard, inaccurate one-off reports in various formats; free IT staff from dealing with individual requests for information; reduce the cost of providing relevant data to users; and automate report development and distribution.

The Strategy

Use WebFOCUS to create a flexible, company-wide reporting environment that enables advanced users to create custom reports and automatically delivers important daily information to everyone who needs it.

The Results

All users can now create consistent, accurate reports. Department managers have a current, company-wide view of critical metrics and the IT department is free to develop new programs.

Information Builders Solution

WebFOCUS, Professional Services.



Warehouse Refresh

Self-Service Reporting Environment Automates Wholesale Operations at Associated Food Stores

Take a look at almost any retail trade publication and you'll spot a common theme: Large chains are making it difficult for small independents to stay in business. For decades, national chains have leveraged their buying power with suppliers to obtain better wholesale prices than their independent competitors. Fortunately for independent supermarket owners in the western United States, Associated Food Stores gives them a fighting chance against the national players.

Associated Food Stores champions the cause of independent grocers, shipping more than 750 truckloads of groceries weekly to almost 450 independently owned supermarkets within an eight state region. The wholesaler helps independent grocers turn impressive profits, and WebFOCUS has been chosen to help the company improve its margins by putting valuable information directly into the hands of the people who need it.

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“WebFOCUS is transforming our organization by empowering people to gather relevant business information and use it in new ways,” says Henry Call, administrator for WebFOCUS at Associated Food Stores. “We’re standardizing on Information Builders’ technology to help the entire organization work more efficiently.”

Establishing a Reporting Standard

The WebFOCUS BI platform is at the heart of an IT transformation project that includes phasing out a legacy mainframe system and moving critical business processes to a Microsoft .NET environment. As part of this initiative, Associated Food is using WebFOCUS software to replace reports built using Crystal Reports and MicroStrategy, with the long-term goal of standardizing on WebFOCUS for all BI and reporting activities.

“We had to establish a way to take all the reports we had on the mainframe and make them available through .NET,” says Call. “Additionally, we wanted to empower users with self-service reporting. WebFOCUS proved to be the perfect solution for these needs.”

Like many large companies, the wholesale distributor, based in Salt Lake City, Utah, struggled with inconsistent and inaccurate reports. They had multiple reporting technologies, with many people creating private reports and databases using Microsoft Access and Microsoft Excel. This led to inconsistencies throughout the organization and forced managers to standardize on one reporting platform.

Picking High Value Reports

Information Builders Professional Services helped Call and his team to install WebFOCUS and create a series of dashboards and reports, many of which are automatically sent via e-mail to department managers and division managers each day. Users can manipulate the content and format of the reports to suit their needs.

The scheduled reports give managers a company-wide view of daily, weekly, and year-to-date metrics, and allow them to click on a variety of different topics for more in-depth information or drill down to the store level to resolve problems. Users also have the ability to see this information displayed in a dashboard.

Call says the new reporting system is much more effective because it queues up relevant information for managers each day. Previously, users received rigid hard copy reports each week. If they wanted more information, they had to query the daily ledger. They couldn’t analyze the data or drill down to pertinent details.

Approximately 70 users at Associated Food Stores receive automated daily reports. If a sales figure looks incorrect, it’s easy to drill down to the underlying data to obtain additional details. Within seconds, a user can determine what went awry in a region, or even in an individual store, and take corrective action.

“Users can now get the information they need without having to go to the IT department to request a report,” says Call. “They get their information more quickly, and we are more efficient in IT. Instead of running reports all the time, our IT pros are developing new applications for the

business. We can be more forward-thinking, finding new ways to make things better for our users.”

Standard financial reports let managers compare sales from the current week to the same week in previous years, revealing expected versus actual revenue, margins, and other crucial information. Shipping reports summarize credits, returns, damaged goods, and all aspects of warehouse operations. Associated Food also distributes accounts receivable statements to its retailers and is developing a variety of accounts payable reports with WebFOCUS.

Loading Up on Consistency

The new WebFOCUS system has also improved the problem of inconsistent information by allowing users to access live data and manipulate it in ways that have never been allowed outside the IT department. Associated has made considerable strides reconciling conflicting Access and Excel files and combining divergent reporting formats; now they have a single source of data on a standardized platform that all users can access to create consistent, accurate reports.

Much of the reporting data is stored in a Microsoft SQL Server 2005 database, while financial data is maintained in an Oracle database. The company is moving from a single server to a development server/production server combo and upgrading to WebFOCUS 7.6.4 on a Windows-based virtual server.

In addition to scheduled reports delivered by WebFOCUS ReportCaster, some employees use WebFOCUS Managed Reporting to create their own reports within designated domains. Built-in security enables the IT department to determine what data and tables users can access, depending on their rolls and abilities.

“The flexibility of WebFOCUS to enable these different levels of reporting is very helpful,” explains Call. “Non-technical users can easily view reports via the dashboard or by e-mail, while advanced users can create their own reports from their own secure view of the data.”

According to Call, whose team set up training classes for those who needed it, “Users have adopted WebFOCUS relatively quickly.”

Approximately 50 Associated employees use Managed Reporting, and 150 users access WebFOCUS reports and data from dashboards. Ultimately, Call expects to use WebFOCUS to deliver information to external users at 450 stores.

“Our vision is to provide scan data to store managers so they can quickly see how their business is doing from a company-wide perspective,” says Call. “Eventually we expect all stores to be able to log onto this system to get everything they need – from billing and order details to weekly specials and sales metrics.”

Associated Food hopes to purchase WebFOCUS Active Reports to expand its business intelligence initiative to mobile users. Call believes WebFOCUS Visual Discovery would also be an excellent way to enhance some of the dashboard displays with three-dimensional bar charts, pie charts, histograms, and other visual devices. Visual Discovery turns raw data into interactive charts and illustrations, allowing users to zoom, pivot, and re-color charts to reveal correlations and

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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**.

relationships within the data.

For now, Call and his colleagues are pleased to have a comprehensive BI framework in place that can handle all of their enterprise reporting needs. "We are a long way from where we want to be, but WebFOCUS has made a huge difference at Associated, enabling us to establish a reporting standard for the company and to fit diverse data access, manipulation, and reporting processes into a common context," concludes Call. "We have accurate information at our fingertips, which helps us run a smarter business."



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