



# ***Bolthouse Farms & Preferred Strategies***

- Implementing End-To-End BI for JD Edwards

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# ***Agenda***

- Introductions
- Bolthouse Farms
- The Selection Process
- Decision Process
- Lessons Learned
- Live Demonstration

# ***Introductions***

- Adam Crigger – Preferred Strategies
- David Reed - Bolthouse Farms
- Booth 1227
- iPad Raffle

# ***Bolthouse Farms***

- Leading Grower and Producer of Carrots
- #1 Vendor of Premium Juices and Beverages
- Growing Distribution / Transportation Business

# ***Bolthouse JDE/BI Environment***

- ERP Environment
  - JDE 8.12
  - iSeries Enterprise Server
  - Full Financials (including Fixed Assets)
  - Full Distribution (including Adv. Pricing)
  - Full Production
- BI Environment
  - Business Objects XIR2 w/Crystal Reports
  - BO Data Integrator for ETL
  - MS SQL2008 ODS
  - Business Planning & Consolidation (BPC)

# ***Why Did We Need a BI Solution?***

- New Management w/ New Business Requirements
- Lots of Data, Little Information
- Development Team Overwhelmed
- Long JDE Development Lifecycle

# ***The Selection Process***

- Selection Narrowed to 4 “Best in Class” Vendors
  - Business Objects, Cognos, Microsoft, Microstrategy
  - Gartner Search, Google, Internal Feedback
- Selection Process
  - RFP
  - Demonstrations
  - Narrow The Field
  - Proof of Concept

# Proof Of Concept - Business

Scenario	Description	Description
1.	P&L	Would like to review either an out of the box P&L or develop a basic one using the reporting tool. Should include drill down capabilities. If additional information is required prior to the demonstration one-off meetings can be arranged.
2.	Forecasting	Review the system's ability to generate a forecasting report based upon previous period's sales at both a summary (SKU Category such as Shortcut) and at a customer level (SKU and customer).
3.	Real Time Financial Monitoring	Create a basic Dashboard that would display daily costs and revenue recognition. This dashboard should reflect changes in transactional data that we could actually monitor within the <u>PoC</u> session.
4.	Ad Hoc Reporting	Demonstrate the capability to take a pre-developed report and begin Ad-Hoc query based on the data pulled by the report.



# Proof Of Concept - IT

Scenario	Description	Description
10.	Business Unit Security	It is expected that each vendor will have an understanding of what JD Edwards Business Unit (BU) Security is prior to arriving at Bolthouse and will be prepared to show a solution for implementing this security. It needs to be documented whether the implementation of BU security is something that is included as part of the proposed solution or if it is a function that will need to be developed and executed upon by the implementation team.
11.	Importing a New Table in an Existing Data Source	We will provide a custom tag file associated with the Item Master (F4101). We would like to see how this custom JDE table is imported and included in the ODS. Bolthouse personnel will then import another custom JDE table for use in query and reporting.
12.	Basic ETL	
12.1.	Extract (Connection)	The Vendor will be required to connect to our Red Prairie WMS system which is currently running on an Oracle 10g database on a <u>Redhat Linux AS4</u> platform.

# PoC Scoring

	Business Objects	MicroStrategy	Cognos
<b>Real Time Monitoring</b>			
Demonstrated ability to refresh data in real time.			
Presented Dashboard to demonstrate real time monitoring.			
Overall ease of use / intuitiveness			
<b>Real Time Monitoring Total</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Ad Hoc Reporting</b>			
Demonstrated ability to create Queries off of Reports			
Intuitiveness of Ad-Hoc query tool.			
Overall ease of use / intuitiveness			
<b>Ad Hoc Reporting Total</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Microsoft Integration</b>			
Was able to e-mail reports to users.			
Ability to embed charts/data in Microsoft documents			
Easy to update embedded charts/data			
Overall ease of use / intuitiveness			
<b>Microsoft Integration Total</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Top 10 Report</b>			
Ability to quickly generate reports showing only a "top 10".			
Ability to publish report out to other users.			
Ability to do "top 10" on multiple criteria.			
Overall ease of use / intuitiveness			

# Evaluation Results

	Vendor #1	Vendor #2	Business Objects	Vendor #3
<b>Functionality</b>	6.10	7.80	8.77	7.13
<b>User Experience</b>	6.24	7.74	8.79	6.93
<b>Scalability</b>	6.05	7.27	8.33	7.33
<b>Average Score</b>	<b>6.13</b>	<b>7.60</b>	<b>8.63</b>	<b>7.13</b>

# ***Deciding Factors in Selection***

- Cost Did **NOT** a End Up Being a Major Factor
- Time to Implement
- Proven JDE Integration
- Implementation Partner

# ***Implementation Timeline***

- Installation Began In Early May
- Up and Running in 1 Week!
- One Month for Highly Customized Sales Universe
- Subsequent Universes < 1 Week (testing!)
- BPC Implemented in 3 Months (too fast!)

# ***Lessons Learned***

- Consider the Complexity of Your IT Environment
- Involve the Power User Base
- Consider All Tools in Your Toolbox
- TCO (software, licensing, time to implement, technology, etc.)
- Your Data is Not As Clean As You Think!

# ***How Has BI Changed Bolthouse?***

- Pressure Taken Off of IT for Reporting Needs
  - Still need to train and mentor, but scales quickly
- Sales Opportunities Identified
- Executive and BoD Reporting Streamlined

# Live Demo!



Line of Buiness	Revenue
Consumer Packaged Goods	\$275,375
Natural Ingredients	\$49,601
Other	\$5,645
Retail Carrot	\$787,365
<b>Grand Total:</b>	<b>\$1,117,986</b>

Line Of Business	Units
Consumer Packaged Goods	22,521
Natural Ingredients	63,377
Other	253
Retail Carrot	137,027
<b>Grand Total:</b>	<b>223,177</b>

## LoB Reporting

