

Watt Stopper / Legrand

 **WattStopper**

 **legrand**[®]

Watt Stopper / Legrand - Background

- A manufacturer of Lighting Control products... primarily for energy savings
- Sales in the \$Xmm range
- 100+ employees
- Five offices in US, plus remote sales
- A catalog of approximately 1,500 active top level SKU's and 4 primary product families
- Kit Assembly for multiple configurations
- Most manufacturing is contract based off-shore in China and Taiwan



Watt Stopper – A Division of Legrand

- A subsidiary of Legrand, French company with '05 sales of \$X bn Euros
- North American subsidiaries (LNA) include Pass & Seymour, Wiremold, Ortronics, and OnQ
- Affiliates have a variety of backend systems including
 - Infinium and ASI (American Software) / iSeries
 - BPCS (SAA Global) / iSeries
 - Dataflow / (Unix)
 - FourthShift / Windows



Watt Stopper – Systems

- J.D. Edwards World customer since 1996
 - Currently on A7.3 cume 10, 30 users
- Business Functions Supported by JDE:
 - Inventory
 - Supply Chain Management
 - GL
 - AP / AR
 - Sales & Order Entry
- Payroll
 - outsourced to ADP

Watt Stopper... Other Applications

- Lotus Notes for Email & Custom Applications
 - Including Contact Management
 - Project Leads and Quotation Management
- Agile
 - Engineering / Supporting overseas Manufacturing
 - BOM management
- “Service Center”
 - A Web Portal to various backend systems

 **Watt Stopper**

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Business Pains – At end of 2005

- Corporate reporting requirements increasing
 - Eg: Purchasing Reporting for cost reduction initiatives
- Departmental alignments increasing need for more detailed rollup reporting (HR, IT)
- Expanded product offerings increasing need for improved sales / margin reporting to more users
 - Eg: New PLMs
- Shorter cycle time required to ‘close the books’
 - Hope to shorten 5-6 days to 3-4 days



Why Business Objects?

- CR in use at some Legrand companies
- CR is compatible w/future Data Warehouse plans
- Crystal Server delivers same reports to Web
- Stable Product, good reputation & experience
- Value and Scalability of Business Objects solutions
- Preferred Strategies is a Business Objects partner offering solutions tailored to JDE
 - Templates (Launchers) for JDE
 - Crystal Training Tailored to JDE
 - Enabler of Quick Start for Watt Stopper



Project Goals become Business Benefits

- Reduce Time required to close month end
 - Simplify Generating reports
 - Ease Distribution of reports
- Broaden appropriate access to reports (web)
 - Web access securely
- Maintain control of report generation
- Reduce User Support Requirements
 - Requests for 'more detailed' reports
(via drill down)



Key Objectives – Gain Ability to...

- Have reports that utilize a drill down method to details
- Maintain secure distribution in a web environment
- Have quick graphical views to Key Performance Indicators
- Have an aggressive timeline, with initial reports up and running for first month end close in 2006



Project Time Line

- Preferred Strategies Initial Consultations
 - November 2005
- December 14, 2005
 - Go decision with Preferred Strategies
 - Issued Purchase Order
- Server Installed Over Holidays
- January 17 Crystal / PS Training Part I
- Feb 1 First reports (by PS) live
- Feb 23 Crystal / PS Training Part II



Initial Reports Identified

- Three reports core to Phase I
 - Departmental Expenses
 - Gross Margin by Product Family
 - Product Family/Product Model/SKU
 - Product Family/Region/District/Sales Rep/Customer
 - Sales Report by Region
 - By Product Family
 - By Customer



Preferred Strategy Deliverables

- Crystal Report Server and 10 CALs
- Crystal Reports Professional XI 4 Seats
- PS: 5 Seats / 5 day Training On Site
- PS: Extended Training
- PS: Consulting
 - Initial Reports Developed by Preferred Strategies
- WS: Setup Win2k Server accessing JDE via ODBC



Example Departmental Reporting – Before Crystal

- Departmental Expenses (monthly)...
 - Generated with ShowCase
 - Converted to PDF files
 - Individual files posted to Lotus Notes Document Library
 - Access Control set individually for each report
 - Standard template, but 19 separate reports to generate, convert, and post
- No drill down into details
- Send email notifications to user
- Approximately 5-6 person/hours monthly



Example Department Reporting – After Crystal

- Run one report, simply specifying date range
- Notify users via email
 - User can drill in to details on any category
- Less than 10 minutes monthly



From Static PDF Report

The Watt Stopper, Inc.
Department Expense Report
December 2005

Prior Year (Month) Actual	Prior Month Actual	Current Month Actual	Current Month Budget	Variance Month PY vs 05A	Variance Month 05B vs 05A	YTD Actual	YTD Budget	Prior Year YTD
13,027	15,642	14,932	14,641	(1,905)	(291)	174,509	173,718	170,886
704	1,038	498	1,025	206		14,285	15,054	13,656
1,471	1,609	1,609	1,206	(138)	(403)	18,687	14,472	16,458
168	0	0	220	168		2,046	2,856	2,238
665	699	699	732	(34)		9,186	9,407	8,729
16,035	18,988	17,738	17,824	(1,953)	(291)	348,743	345,587	344,067
0	0	0	0					
1,692	4,250	3,134	5,296	(1,558)				
102	102	102	333					
0	0	0	0					
0	1,256	1,904	600	(747)				
0	0	0	1,500					
0	0	0	500					
0	0	0	0					
0	0	0	0					
17,829	24,596	22,131	26,053	(7,765)	(291)			

145 / 152 Main Report

BusinessObjects 100%

Department Expense Report

For the period ending January 31, 2006

Prior Year (Month) Actual	Prior Month Actual	Current Month Actual	Current Month Budget	Variance Month A06 & PRY	Variance B06 & A06	P1511 - Software Development-Panels	YTD Actual	YTD Budget	Prior Year YTD
Personnel & Direct Expenses									
14,108	14,932	15,017	14,733	(909)	(284)	6020 - Salaries	15,017	14,733	14,108
1,365	498	1,439	1,473	(74)	34	6040 - Payroll Taxes	1,439	1,473	1,365
1,503	1,609	1,538	1,820	(34)	282	6050 - Health Insurance	1,538	1,820	1,503
210	-	-	147	210	147	6060 - Workers' Compensation Ins.	-	147	210
665	699	699	737	(34)	38	6080 - Employer 401(K) Match	699	737	665
17,850	17,737	18,692	18,910	(842)	218	Total Personnel Costs	18,692	18,910	17,850
-	-	-	-	-	-	7060 - Travel	-	-	-
-	-	-	1,500	-	1,500	7070 - Meals & Entertainment	-	1,500	-
-	-	-	-	-	-	7140 - Training & Seminar	-	-	-
1,050	3,134	4,778	5,742	(3,728)	965	7510 - Outside Services	4,778	5,742	1,050
102	102	102	102	-	-	8010 - Depreciation	102	102	102
-	-	-	-	-	-	8011 - Depreciation-Software	-	-	-
-	-	-	300	-	300	8080 - Supplies	-	300	-
4,394	1,904	-	-	4,394	-	9011 - Sample Expense	-	-	4,394
-	-	-	500	-	500	9012 - Office Equipment Expense	-	500	-
-	(747)	-	-	-	-	9013 - QCL Software Expense	-	-	-
-	-	-	50	-	50	9050 - Dues & Subscription	-	50	-
5,546	4,393	4,880	-	-	-				
23,397	22,130	23,572	-	-	-				

To Web Access with Drill Down

Example District Sales Reporting – Before Crystal

- Extract Sales data into Excel using Showcase
- Manipulate Pivot tables
 - Large spreadsheet (approaching Excel limits)
- Different set of spreadsheets for each sales region
- Burn CDs and mail to sales team (over 25 sets)
- One person in Accounting @ 8 hours + CD burn and distribution



Example District Sales Reporting – After Crystal

- Run two reports, specifying date range
 - By Product Family
 - By Customer
- Notify users via email
 - Full drill down capability
- Less than 20 minutes monthly



Lessons Learned

- Don't skimp on Training
- A good partner knowledgeable in Crystal applied with JDE will smooth out your start
 - Preferred Strategies is key to our quick go live
- Plan for some consulting time as you look at complex drill downs and security



Information Sources

Questions?

Useful Information Sources:

- www.businessobjects/oracle.com
- www.oracle.com/applications/jdedwards-world.html

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