

A Large Australian Postal Company

A Mobile Business Intelligence Solution

Need

The organisation desired greater clarity, transparency and accuracy of their information and their financial data.

Solution

Tridant was able to deliver a solution for the organisation that can be segmented into three main parts;

1. Cognos TM1 presentation layer design,
2. visual design element of the dashboard,
3. BI, turning design into reality.

Benefit

The organisation keenly felt the benefits of Tridant's approach to the project, resulting in the streamlining of data and processes, the automation and integration of data from TM1 to BI, and the creation of the reporting dashboard for financial management.

Background

A large parcel and postal distribution organisation with a range of complementary services has been successfully connecting and serving the public for many years. Different business units have adapted to a changing consumer and business environment, providing services as diverse as mail and package delivery, a range of government services and a national retail network.

When the needs of consumers and the businesses community changed, so too is the need for the organisation to accommodate this by modifying the products and services currently delivered - spanning from the frontline customer interfacing in stores, into the evolving virtual environment with online services and digital mailboxes.

The challenge

To meet the challenges of providing a new and diversified product and service range to the market place, the underpinning infrastructure needed to be able to support the logistics of multiple business groups within the organisation, and for financial data to be readily accessed and reported from.

The organisation desired greater clarity, transparency and accuracy of their information and their financial data. The senior finance team sought a summarised view of metrics in an easy to

Solution components

- Cognos TM1
- Cognos Business Intelligence (BI)
- Cognos Report Studio
- Cognos Mobile Server

use, mobile reporting dashboard. Quicker access to the most pertinent data to each business group meant quicker and better decision making, planning and forecasting.

Cognos TM1 was already in use for the management of data, but it wasn't integrated to Business Intelligence (BI) reporting. To be able to generate month-end reports and analytics requirements for the business units, the finance analysts were exporting data out of TM1 into MS Excel spreadsheets.

The amount of data TM1 collected was vast and immense, and the reporting process was manually intensive, time-consuming and lacked transparency. Due to the volume and complexity of the financial data, different methodologies were used to extract numbers from different people and different business units. Inconsistent methods resulted in inconsistent figures.

As such, the analysts had little confidence in the accuracy of data. The process of gathering data to generate reports was detracting from the actual analysis of the reports.

The organisation needed a way to simplify the processes and create automated and consistent methodologies in order to allow the finance team to analyse the available data to make considered and informed decisions for the growth of the business.

The BI consultants worked closely with the designer to build something aesthetically pleasing, as well as functional.

The solution

Tridant was able to deliver a solution for the organisation that can be segmented into three main parts – the Cognos TM1 presentation layer design, the visual design element of the dashboard, and finally the BI, turning design into reality.

In reworking TM1, the TM1 cubes were optimised for finance reporting using summarised reporting cubes. Small and precise reporting cubes were built specifically for Cognos BI to allow for the timely delivery of data.

To optimise the visual elements and design of the dashboard, Tridant leveraged our Graphic Design team to assist with the design and layout of the dashboard. The design of the dashboard would help to tell the story of the data via a clear graphical representation, making it concise and easier to use.

And for the data critical to reporting from TM1 that had originally been exported to spreadsheets, the BI consultants utilised those requirements and sourced them back to the TM1 reporting cubes and created the required visual objects, such as cross tabs, smart boxes, traffic light indicators, trending and drill-down navigations.

The BI consultants worked closely with the designer to build something aesthetically pleasing, as well as functional. The smaller the user interface, the more critical it was for the design elements to be not only of appropriate size but also for them to enhance the way the data could tell the story and not hinder it.

The dashboard was unique and custom designed, user-friendly and mobile - used on iPads with a one click drill through to supporting detail.

The benefits

The organisation keenly felt the benefits of Tridant's approach to the project, resulting in the streamlining of data and processes, the automation and integration of data from TM1 to BI, and the creation of the reporting dashboard for financial management.

The dashboard was unique and custom designed, user-friendly and mobile - used on iPads with a one click drill through to supporting detail. When flipped to portrait mode, an added feature has been incorporated; the iPad screen changes to display instructions and explanation of the current pages data and definitions of key terms for consistency of interpretation.

Tridant also integrated a custom security system screen on each report protecting against the risk of devices being misplaced and inappropriately accessed. The transfer of data from TM1 to the report is now automated from end to end, however, the organisation wanted to retain a level of flexibility to trigger certain events and create what-if scenarios, which Tridant built into the system.

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On the completion of the budget, data can now be pushed through, and a report generated within a much quicker timeframe. This ensures data is received and consumed as soon as possible, enabling executive management to make timely decisions. It also allows the senior leadership team to compare actuals to budget and month on month, using a rich visual environment.

About Tridant

Tridant is a leading technology and solution provider serving clients throughout Australia. We are experts in designing and implementing applications optimised for the management processes of planning, reporting, analysing, profiling and risk management. We help our clients leverage their data assets to improve performance, increase revenue, reduce risk and make their businesses more responsive to market opportunities and threats.

Since our inception we have delivered successful data-driven technology solutions to public, private and government organisations and can rightfully claim to work with six out of the ten largest companies in Australia.

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