



Customer Story

Entrinsik Informer & Wynne Systems Deliver a Robust Ad-Hoc BI Solution to the World's Largest Caterpillar Equipment Dealer

Conversation with Brenda Sheplaw, IT Manager, The Cat Rental Store

Pain points

- Used a combination of non-uniform reporting tools that required manual generation
- Untimely access to reports
- Training and security challenges that added to end-user frustration

Results

- Ability to target specific Key Performance Indicators (KPI's) for improvement and quick decision-making
- Saved time with improved data analysis functionality and export capabilities
- Self-service, ad-hoc data analysis tools for all users



The Cat Rental Store Customer Story

Challenge

Entrinsik partner Wynne Systems is a global software company producing rental equipment software for the equipment industry and business intelligence tools for a large variety of sectors. Their product offering includes a powerhouse product, Axiom® ERP, based on the robust and reliable IBM i platform.

The Cat Rental Store is a subsidiary of Finning International Inc., the world's largest Caterpillar equipment dealer. The Cat Rental Store is a full service rental organization, featuring a full line of mid-size and smaller Caterpillar machinery as well as a variety of other name brands and equipment. The business serves a diverse range of industrial markets and supports their customers with high quality Rental Equipment, Used Equipment Sales, New Equipment Sales, Safety Training Services, and Plant Shutdown Services & Asset Management Programs. The Cat Rental Store has become a leading rental service provider in Western Canada.

The team at The Cat Rental Store used a combination of different reporting tools and data sources including Axiom ERP, IBM Cognos, Showcase, AS400 Query, SQL, and SugarCRM with Excel in order to get the reporting results they needed. In many cases the reports were manually generated and then amalgamated by either importing or copying data into spreadsheet templates. The Cat Rental Store generated Axiom ERP reports, custom queries and Excel spreadsheets with most of their Key Performance Indicator (KPI) information, collected and reported on at month's end, not in real time. Reports were primarily created, modified, and distributed either through members of the IT or Accounting departments. This reporting environment created multiple challenges: untimely access to reports, non-uniformity in data analysis, Excel skills/access restrictions, large file distribution, and end-user interpretation and training difficulties, among others.

“Our reporting was reactive and not proactive,” says Brenda Sheplawy, IT Manager at The Cat Rental Store. “We were unable to create adequate ‘exception reporting’ that could be supplied to our users in a timely manner. It was difficult for our users to get the financial and operational information they needed in order to make decisions quickly.” Having so many reporting tools & data sources also created training and security challenges that added to end user frustration. For the most part, reporting was centralized and managers were unable to get the information they needed, when they needed it, on their own.

The Cat Rental Store had excellent rental information from their Axiom ERP (Rentalman), but did not have the reporting tools required to deliver it effectively.

Solution

The Cat Rental Store needed to introduce an integrated Business Intelligence (BI) tool into the organization that would put advanced reporting and dashboarding capabilities into the hands of managers so they could respond quickly to continuously changing business conditions.

The team was looking for a BI tool to provide the following functionality:

- Dashboards – visualization of information in multiple ways
- Data Analysis – ability to uncover trends and opportunities
- Advanced Report Generation – ability to create self-service reporting, easy to use, ability to export data to other formats
- Integration – ability to integrate multiple data sources

The Cat Rental Store originally learned about Entrinsik Informer through SugarCRM (Entrinsik is a SugarCRM partner) and various BI publications where it was consistently given a high BI rating, and they were excited when Wynne Systems announced the integration of Entrinsik Informer into their Axiom ERP.

Results

“By making it easy to introduce benchmarking techniques into our interactive dashboards, we were able to provide real time actionable information to our users,” said Sheplawy. “We were also able to target specific Key Performance Indicators (KPI’s) for improvement and provide exceptional reporting to the company so that we are able to make quicker and more informed business decisions. We have been able to provide users with data analysis functionality and export capabilities that they have never had access to before. It has cut down the time required to capture and analyze data.”

Now that the Axiom ERP has embedded Informer into Axiom Reporter™, the features they like the most include:

- Dashboards with interactive drill down reporting capabilities;
- Ability to export data into different formats directly from a report;
- Ad-hoc, self-service report creation, e.g. column sorts, column totals and other aggregates, summary sorts, drill downs, analytics, and chart creation, all done by the user;
- Ease of use – “our users love it!” – minimal training is required and it is easy to navigate.

“Our users are now able to get the answers they need from our data using the self-service, ad-hoc data analysis tools available in Axiom Reporter,” said Sheplawy. “We no longer have to create multiple reports on the same data based on individual user requirements. It is very exciting to see this happening. It is an invaluable tool. It allows our users to easily analyze our data and provides actionable results for better decision making by our business leaders at every level. The results are amazing!”

Here are some comments from end users at The Cat Rental Store:

“I have a hard time saying how much time that it saves me. There’s information that I pull out of it that would be incredibly difficult to get any other way. The other part is that it is excellent for being able to export into an Excel spreadsheet and manipulate from there. It’s incredibly user friendly.”

~ Regional Manager (Southern Division)

“This is absolutely awesome information! Thank you very much. This is going to change our pump business.”

~ Industry Manager (Pumps & Generators)

“To date, I’m primarily using Axiom (Reporter) to help drive better Financial Utilization & Time Utilization. We have always been able to locate idle fleet, but with Axiom Reporter, it’s much quicker and the reports are very clean and filtered down to just the information you’re after.”

~ Manager (Electrical Division)

The Cat Rental Store is also planning to seamlessly incorporate SugarCRM reporting in with their Axiom ERP reporting without changing the end user reporting experience. No additional training by the user will be required.

They will also be able use the same “real time information” from both their Axiom ERP and SugarCRM application (integration of data sources with Axiom Reporter) providing “one version of the truth.”

“It is about the accuracy and timeliness of the information that is important to us,” said Sheplawy.



This is beautiful! It's exactly what I need to see; trends of big customers as a whole rather than individual accounts.

Director of Sales and Operations, The Cat Rental Store