



OXS Based Ad hoc Reporting for an ERP Solution

OPRO Enterprise Case Study Series

A study based on the solution for
Terokaseiko Co., Ltd, Japan

Preface

ERP (Enterprise Resource Planning) is an industry term for the broad set of activities supported by multi-module application software which manages business functions, including product planning, purchasing, inventory management, supplier management, CRM, and orders management. The mission of a good ERP is to integrate all business functions onto a unified system. A typical ERP system will use multiple components of computer software and hardware for integration.

Some organizations - typically those with sufficient in-house IT skills opt to integrate multiple software products - choose to implement only portions of an ERP system and develop an external interface to other ERP or stand-alone systems for their other application needs. This integrated approach can have a tremendous payback if companies deploy the software correctly.

Company Profile

Terokaseiko Co., Ltd is a manufacturer of high quality digital scales, scale printers and other accessories for a large number of customers including retail stores, food plants and shipping companies. These products are marketed in over 100 countries through a strong distribution network.

Terokaseiko established a distributor support information system to manage sales channels. This system allowed the company to share their ERP data between sales partners by using XML based web services.

Terokaseiko used OPRO X Server Professional Edition as the principal reporting module of their ERP and it plays a key role in the business process and generates many reports and custom documents, and helps managing the document history.

Challenge

Terokaseikos' sales partners uses a web based system to integrate sales forecast, order, delivery, invoicing and other sales related data. The regional sales offices process data and manage the Sales process. Initially order processing was handled via FAX messages. However migration to a web based order processing allowed the company to save time and streamline the product ordering process. The new system is updated periodically allowing the sales partners to get up to date product information easily. In addition users could download the order and delivery reports from the new system. This project kicked off in summer of 2005 and was successfully completed in July.

ERP Solution

Terokaseiko uses Exact as their ERP system. Exact is XML compliant and allowed easy data interchange with other systems. According to the product evaluations of Terokaseiko, Exact met all criteria and it was chosen as the ERP module. Some of their major sales partners already had their own ERP systems. These systems used different software packages and their system architectures were different from Terokaseiko ERP system.

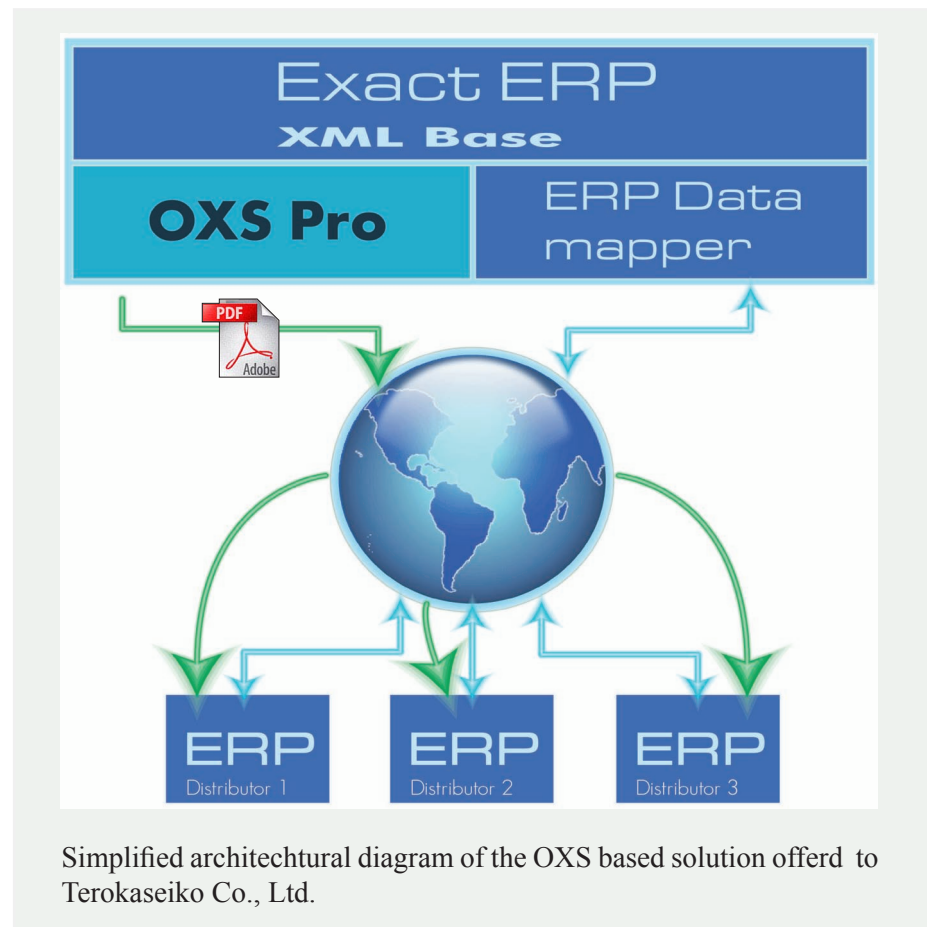
Due to the different software environments involved in the process it was

difficult to implement data interchange within the systems. Possibility of sharing the ERP data between partner companies using web services proved to be a very promising idea and implementing such a solution would also help to reduce information systems expenses.

The new solution introduced by the company allowed the data sharing through web services and this also enabled the company to provide up to date information to its' sales partners.


Reasons to Select OXS Professional Edition

Terokaseiko needed a web interface for partner communications while a separate interface was necessary to map ERP systems used by other partners.



One major problem encountered in this was the inadequate report design options provided by the ERP. The system modifications were costly and the ERP system provided little space for customization of their reports. Attempts to customize existing ERP products to improve their reporting proved too costly. Therefore Terokaseiko selected OXS Professional Edition as an ad hoc reporting solution.

When an output request is received from a client system, OPRO X Server Professional Edition obtains data from Exact (ERP System at Terokaseiko) and creates a PDF document with the relevant information to the user. Since the generated output is in PDF format, the clients can print it as it is or can share it with others via e-mail.



The web based enterprise report management interface of OXS Professional Edition was proven to be a valuable feature in this project. Deployment of OXS does not require any additional hardware or software. These business friendly features of OXS led Terokaseiko select OPRO X Server Professional Edition as their reporting solution. After the integration users from any geographical location were able to obtain the required information easily.

Designing custom templates for reports was simple, easy and the report templates were freely modifiable. These features were quite useful to Terokaseiko and allowed them to automate the manual report generation process.

Ability to Generate Custom Invoices

Some of Terokaseikos customers required specially formatted invoices for their transactions. These special invoices are called 'Exclusive Slips'. Before the new system was implemented generating Exclusive Slips was handled by a special division. They manually prepared the exclusive slips by extracting data from the system by accessing the database and transferring them to a spreadsheet.

This process took considerable amount of time and resources as it was done manually. This division had to prepare more than 100 customized slips for their partners and OXS provided a simple and efficient solution for this problem. OXS offered an easy method to define custom report formats and these reports could be generated easily too.


History Management and Improved Customer Care

Another requirement of the new system was an interface which could manage the invoice history. Each month Terokaseiko receives more than 100 inquiries from their customers requesting clarifications about their product orders. In such a situation the customer invoice history needs to be easily accessible and queried in order to respond to these customer queries. OXS was able to fulfill this requirement through the history management features embedded in OPRO X Server Professional Edition.

Terokaseiko uses Lotus Notes for intra-organizational communications. Invoices were sent from employee to employee as Lotus Notes attachments. Therefore the data transferred to MS-Excel documents were saved and this data was later attached to Lotus Notes files. This was a redundant process that needed to be changed. OXS Professional Edition generates the invoice with the required real-time data in PDF format based on the given template. The history management functions of OXS Professional Edition records the document details for future reference. The history search function of OXS allowed the users to track any document generated earlier. These documents could be easily accessed later using the history management interface. This process greatly reduced the time taken to locate previous invoices.

E-Document Compliance

At the time this document was created Terokaseiko had not fully evaluated how their information system is going to comply with the new J-SOX e-document regulations. They were clearly aware of the advantages of OXS Professional Edition offered in this context compared to their previous docu-



ment management tool. In the legacy system invoice data was saved in the MS-Excel format and saving them again as Lotus Notes attachments fell well short of the SOX regulations. One of the major drawbacks in this system was that updated files only showed the operating system time stamp, which could be modified easily. However when an invoice is generated using OXS, all the records can be managed and time stamped. The history management feature could be used to locate previously generated invoices too.

Web URL: <http://www.teraokaseiko.com>

Exact, Lotus Notes, Exact and MS-Excel are registered marks of respective companies.



About OPRO

OPRO Japan is dedicated to provide business solutions which "Make Information Technology Simple". OPRO uses latest technologies to provide simple reporting and document delivery solution. OPRO X Server powered reporting solutions could be deployed at different hardware / software environments. We have wide experience in successfully deploying our products in different operating systems and database management systems.



JAPAN

OPRO Japan Co., Ltd.
6F Shibashin-Mita Bldg,
3-43-15, Shiba, Minato-ku,
Tokyo 105-0014,
Japan.

Tel :+81 3-5765-6510
Fax:+81 3-5765-6560

SRI LANKA

OPRO Lanka (Pvt) Ltd.
08th Floor, East Tower,
World Trade Center,
Echelon Square,
Colombo 01,
Sri Lanka.

"Make IT Simple!"

E-mail: inquiry_en@jp.opro.net
Web: <http://www.opro.net/en>