Integrated EDI versus Stand Alone
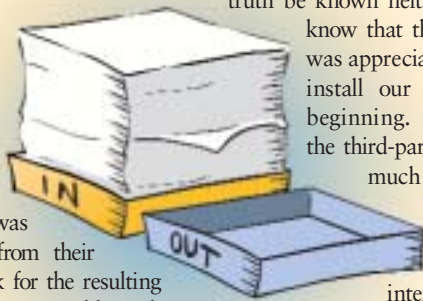
A Case Study *by Stuart Richler*

In 1994, a client based in Toronto asked us to provide a cost estimate for implementing our integrated EDI module. Upon reviewing our quote, the client decided that the cost was prohibitive. Their solution was purchasing and installing a third party translator (stand-alone solution). Their decision was based on cost and the transaction load at that time. They did not consider their EDI growth to be significant enough to warrant putting the effort or money into an integrated solution.

The requirement at the time was to accept purchase orders from their clients and send invoices back for the resulting sales orders. Their plan was to use an old PC along with the translator, modem, and communications software, to dial up and retrieve/send documents from/to the value added network (VAN). Upon receipt, documents were printed and manually posted into their order entry system. What seemed simple at the beginning became complex. The old PC couldn't do the job. A step involving transferring the incoming purchase orders to another machine for the printing and verifying soon became part of an arduous task. Once the invoice was prepared and printed, it was manually posted to the translator and sent to the customer electronically.

Fast forward a few years. Our client's EDI requirements grew. The number of trading partners and volume of EDI transactions exploded. They were also pressured into providing new documents such as the advance ship notice. They reached a point where orders received on Monday morning were posted to their order entry system on Wednesday afternoon. This resulted in delayed shipping and penalty charge-backs from some of their larger customers. A temp was hired to handle just the invoice volume, adding to the cost of processing.

At this point, the client saw the light. We were called in to install and implement our integrated solution. We installed the software, configured the partner profiles, and set up all the maps in a three-week period during the summer. After testing and re-testing, we decided to "go live" on a Monday morning in August. Not wanting to upset their regular processes, we asked that they copy the inbound EDI file to a diskette that we would pick up Monday morning at 9:00am. We arrived at the appointed time, took the diskette, and copied the files to our new translator environment. Within one hour, over 200 orders were created in their order entry system. Once processed, these orders were invoiced and sent immediately (no manual posting!).

How much did they spend on the stop-gap solution? We don't know the exact amount, and truth be known neither does our client. We do know that the total operating cost alone was appreciably more than the amount to install our integrated solution at the beginning. To be sure, the third-party software license cost was much less than our proposal, but the ongoing cost of shipping delay penalties, temporary employees, internal manual processing costs, data entry errors, etc. rendered their original solution very cost ineffective. In the long run, they spent much more on the stand-alone solution versus an integrated solution.

Stuart Richler is President of GTR Data Inc. Stuart can be reached at (514)738-6680 or stuart@gtrdata.com.

POSTSCRIPT: A very informal, unscientific poll taken of B&L clients showed the following:

Customer's manually entering ASN (Advance Shipping Notification) data from the B&L packing slip system are experiencing error rates of up to 20%. Trading partners are penalizing suppliers for these errors by creating a laborious error correction procedure, which results in delayed collections and poor cash flow for the supplier. If this error rate is applied to material release data (850, 860, 830, 862, Delfor, Deljit, etc.), balance-to-make order quantities could be horribly misleading.

A smaller B&L client using an integrated solution reported processing 200 to 300 documents per week with each document containing from one to several hundred transactions. Their total volume is between 1500 and 2000 transactions per week. When asked how does an integrated EDI solution work for you? The answer was "We are in maintenance mode. Combined time spent on both incoming and outgoing transactions is in the 13 to 15 hours per week range." Errors on ASN's are virtually zero.

From the Pres….

It's all about going LIVE!

Phil Laney

Every year in early January, B&L holds our annual employee kick-off meeting. At this meeting we review the previous year, but more importantly, we present and discuss corporate-wide goals for the upcoming year.

This year one of our top business goals is to do everything in our power to assist customers in going live on B&L software. Of the 3 business functions we do here at B&L – creating, selling, and implementing software – the last is the component we have the least control over. The degree to which a client implements the software is ultimately up to the client. We believe we've put together an effective package of services to assist customers with their implementation goals. But, they must be the customer's goals, not ours. They must drive the software implementation process and see it through to fruition.

SPECTRUM 2004

Mark your calendars for the 2004 B&L User's Conference

Philadelphia, PA
October 11 & 12, 2004

IN THIS ISSUE…
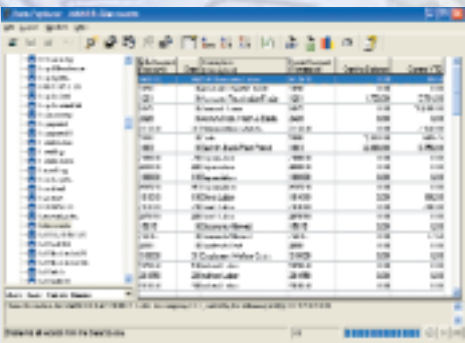
R&D DEVELOPMENTS

Doug Hinman

The Many Facets of Intelligent Views

Version 2.3 of Odyssey introduced a powerful add-on module known as Intelligent Views. **IV** has been available to Odyssey users for some time, but with so many enhancements in 2.3 there is little comparison. A key feature of **IV** is the ability to access any ODBC compliant database as well as native Progress databases. In addition, features specific to BLIS are also built right in. This is our first module that can be used for both BLIS and Odyssey. Shared development across our entire customer base is an important productivity gain for R&D.

IV is a very powerful tool. It's so flexible we have trouble describing it. You can design your own views of data with summaries (totals), calculated fields (formulas), drilldowns, exports, etc. and deploy them to your Windows desktop or any device with a web browser (PC, PDA, cell phone, etc.). **IV** contains its own security layer to define who can access which views, who can create their own views (power users), and which files power users can create views over. You can look at **IV** as a diamond with each facet providing a different capability. It's an ad-hoc access tool, an integrator between BLIS and Odyssey (and most any database) and Excel, a drilldown inquiry tool, an image viewer, and much more.

Perhaps the best way to understand Intelligent Views is through examples. Here's a few of the types of views you can create.

➡ Show users just the data they need to do their job without having to navigate through standard BLIS or Odyssey menus and screens.

➡ Process inquiries that show shop order information with drilldowns into instructions, pictures, and videos.

➡ Internet customer order status. Authorize your customers to views of the orders for their castings. Salesmen can also display orders (RFQs, too) over the internet for their customers.

➡ Internet supplier status. Authorize your suppliers to views of the on-hand quantities of items they supply you. You could also create views for outside painters, machine shops, etc. to see what you have shipped to and received from them.

➡ Tool location look-up. Using a PDA with an RF connection to your network, a worker on the shop floor can find the storage location of patterns and dies.

➡ Link PC files, such as Word documents, Acrobat PDFs, etc. to products and other master records and then display them. **IV** uses Windows file association so when you click on a link that points to a Word document, for example, it automatically opens the document in Microsoft Word. This can include CAD drawing links where a CAD viewer program is installed on the PC accessing the **IV** view.

➡ Summarize hours worked by clock number for the week and export that data to a CSV (Comma Separated Values) file for interfacing to a third-party payroll system.

➡ List scrap transactions for a selected period and export them to Excel. A view can point to an existing Excel template and automatically run a macro you name. The macro could convert the raw scrap data into a pivot table, for example.

➡ List BLIS or Odyssey employees with a drilldown showing Human Resources information from a third-party HR system. You could even display related information stored in a home-grown Microsoft Access database.

➡ Store the UPS tracking number in an unused field in the order files and then create an **IV** formula that provides a link that goes directly to the UPS web site for that shipment.

From the Pres... Going LIVE!

Over the past 28 years of partnering with foundries and die casters in their enterprise software implementation projects, we've observed 5 critical components that are absolutely necessary for a successful implementation. In order of importance, they are:

1) Top management commitment – It all starts at the top. The top person, that's right, the top individual at the organization must publicly back the project…and then follow through with adequate money and manpower to ensure success.

2) Detailed project management – An implementation team has to be formed with the authority and power to get the job done.

3) Training, Training, Training – Fear is the enemy of change. Ignorance is a breeding ground for fear. By adequate and continual training on the new system, the resistance to change will be minimized and better utilization will follow.

4) Avoid custom programming – Use the system "as is" for at least 6 months or even a year before making any changes. Usually, users comfortably adapt to the new system and discover it's actually better than "the way we've always done it."

5) Strike fast; celebrate victories – Plan on cutting over live as soon as possible, while the euphoria of the initial software purchase is still prevalent. Slow implementations seem to drag out forever. As you cut over live, celebrate victories. Throw a pizza party or give gift certificates to the employees who are involved with the project. Its hard work putting these systems in…they deserve a little recognition.

I would like to personally extend an offer to all top management at our customer's sites who are struggling with implementing B&L software products. If you've encountered constant project obstacles and nagging implementation issues, please contact me directly and I will work with you to determine what B&L can do to help you resolve these problems and begin realizing the true potential of the B&L software. My phone number is 269.465.6207 x-313 or email planey@blinfo.com.

Sincerely,

Phil Laney

Dear Brenda

Brenda Povlock

Dear Brenda,

I have 2 PM's that are causing problems. I have one PM that is being scheduled for February, even though the frequency flags are set not to schedule for February, and the other PM doesn't create a new work order at all when I submit the option to create the PM schedule. I've looked at the PM's and they both look fine to me.

Annoyed

Dear Annoyed,

I have heard this before. Do me a favor and check those PM's again, only this time look for these possibilities. On the first PM that is scheduling for February, make sure the frequency flag on the month of February is blank by putting your cursor on it and pressing the space key. I have seen someone accidentally put the character _ (underscore) in that field. It's undetectable to the naked eye but the computer knows it's there! Remember that any character in the frequency field tells the system to schedule for that time period. On the second PM, check to see how many work order items already exist for that PM. If you have item numbers 1 – 999, then there are no item numbers available to create. You must go to menu MAM840 (Purges and Year End) and run option 1 for Work Order Purge. This option will purge all completed work order items through a date. Once the old work orders are deleted, you can run the "create schedule" option again and your work order will be created.

Dear Brenda,

I am in the process of implementing BLIS-DC, and we want to use the old badges we had from our previous data collection system to save some money. The problem is that the current badge actually has the badge number embedded within other information in the barcode. Is there a way I can still use it?
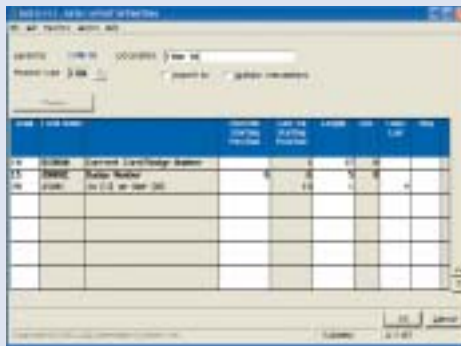
Hopeful or Hopeless in Illinois??

Dear Hopeful,

Hopeful is correct in this instance, and you have come to the right place to get your answer. BLIS-DC is flexible enough to handle almost any-

thing. Let's say your badge barcode has the following string of data in it: JGI44115063I. Let's say the badge number is 11506 within that string of data. Here's what you can do to trick BLIS-DC into thinking your employees are just swiping the badge number. First, create a user-defined field by going into the Transaction Design menu (DCM200) and then go into Work With Field Master. Add a user-defined field by pressing F9 and typing in the record type of TIME, field name, which can be anything you want it to but it must start with a $ sign, then press Enter. Now, enter the length (in this case 12). Field Type should be A for Alphanumeric because there are characters in the barcode you will be scanning. Create a mode prompt for clocking in, as shown below. It should consist of the following fields: the user-defined field you created, then fields called JBADGE and JSTRT.

Notice that the only field to display on the scanner is the user-defined field you created, and the prompt text says "Scan Card Barcode" (note that the text can be whatever you want). Once the prompt is created, go to the Data Layout Definition for that mode and in front of the badge number, type the override starting position (see screen below), which in this case would be 6 because that is where the badge number begins in the string mentioned above. Now when a person swipes the badge, BLIS-DC gets the string of data starting in position 6 thru position 10, tricking the system into thinking all that was scanned was the badge.

Dear Brenda,

When I generate Accounts Payable Accrual transactions from the G/L Monthly Journal Voucher screen, I don't get an accrual account number on the G/L General Accrual Journal Voucher (un-invoiced purchase receipts). Why?

Missing in Action

Dear Missing in Action,

Check your Currency Code Master Table (shown below) and make sure you have an account number specified for the unvouchered A/P Account field. Once an account number is in the currency code file, the next time you generate journal vouchers for accrual, the general ledger account number should no longer be missing in action.

Dear Brenda,

We would like to simplify the routing in several products that we have, and to do that we must delete a couple of routing steps. What would be the best way to accomplish this?

Simple Simon

Dear Simon,

That is a very good question. The proper steps would be to first change the routing on products. Once the routing is changed, you must do a physical inventory on the products being changed. It is very important that you save the book balance option after you have made the changes to the routings. Then enter tags and run any of the physical inventory reports, then update your inventory. If you're using cost, call your consultant for additional information. This should help keep your life simple.

UPCOMING CLASSES & EVENTS

NOTE 1: All unscheduled classes can be held on an "on demand" basis, meaning if you need a class that is not scheduled, give us a call and we'll do our best to accommodate you. *Contact Brenda Povlock at ext. 321* if you are interested. Following is a complete listing of classes offered:

AP/AR Invoicing	*Financial Management*
BLIS-DC	*Maintenance Management*
BLIS-MMI	*Navigation of BLIS*
BLIS-MPC	*Odyssey Boot Camp (Odyssey only)*
BLIS Data Downloading	*Order Processing*
Container/Consignment Inventory	*Production Scheduling – Introduction*
Cost Applications	*Production Scheduling – Advanced*
Cost Estimating & RFQ	*Purchasing/Material Management*
Crystal Reports (Odyssey only)	*Quality Management*
Database/System Administration	*Query/400*

NOTE 2: All classes are subject to change.
You can always obtain a current schedule of training classes by visiting our web site www.blinfo.com.

WHEN	WHAT	WHERE
April 20 & 21	Intro Production Scheduling	Bridgman, MI
April 22 & 23	Advanced Production Scheduling	Bridgman, MI
April 28 & 29	Purchasing Class	Bridgman, MI
May 27	Container/Consignmnent Inventory	Bridgman, MI
June 12-15	108th Metalcasting Congress, Booth 507	Rosemont, IL
June 22	Release 6.1 Class	St. Joseph, MI
June 24	Release 6.1 Class	St. Louis, MI
June 29	Release 6.1 Class	Oakland, CA
July 13	Release 6.1 Class - Video Conference	Harrisburg, PA

AWARDS 2004

NADCA'S 2003 Best of the Best Awards

SPX Contech
Portage, MI
For their entry — Multi-link rear suspension for a 2004 Chrysler Pacifica

Twin City Die Castings
Monticello, MN
For their entry — 2090 assembly for a Care Link Programmer

Video Conference Release Class

B&L will be holding our first release class via video conference at the Harrisburg Community College in Harrisburg, Pennsylvania. Customers in Pennsylvania or those who might choose to travel to Harrisburg can attend the B&L 6.1 Release class through the video conference facilities at HCC. This is a first for B&L and, if it proves effective, we would explore other video conference locations around the country. The instructor will be located at our Bridgman, Michigan, offices and would be dedicated to the remote class in Harrisburg. Again, customers would need to attend the class at the Harrisburg Community College in Harrisburg, Pennsylvania. For more information contact Brenda Povlock at 269-465-6207, ext. 321 or bpovlock@blinfo.com.

Contact B&L

Phone: 269-465-6207

Web site: www.blinfo.com

Please send article suggestions to:
Sandy Warren; swarren@blinfo.com

For more information, or if you need a speaker for your local or regional industry meeting, contact:

info@blinfo.com

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