



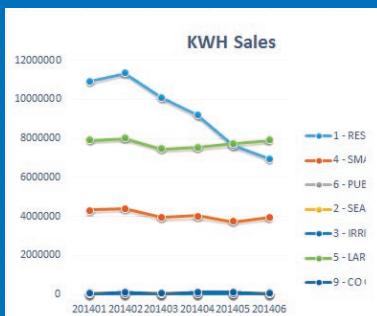
# Business Intelligence (BI)

## Key Features

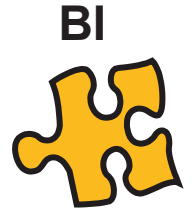
- Prebuilt queries
- Easy to use and filter records
- Easy access to information without programming
- Provide information to non-traditional users without cost of application access
- Scalable to any organization
- Built with Excel 2010

## Value to Utility

- Reduce need for direct access to database
- On-demand updates
- Solution provides access to data, charts, graphs and pivot tables
- Save money by reducing custom reports
- Foundation for utility to create additional reports and dashboards



## Product Overview



Professional Computer Systems, Co. (PCS) clients have a strong need to use their data to manage many aspects of serving customers, seeking operational efficiency gains, and cost control initiatives. To help meet this need, PCS has developed a BI solution based on a set of core informational datasets, reports, and visual presentations.

### Definition of Business Intelligence

Business Intelligence refers to computer-based techniques used in identifying, extracting, and analyzing business data such as revenue, operational and production cost, and statistical information. Business Intelligence transforms raw data into meaningful and useful information for business decision making. BI technologies provide historical, current, and predictive views of business data. Common functions of BI technologies are reporting, analytics, business performance measurements, benchmarking, etc.

### Built With the Power of Excel

All BI outputs are built with Microsoft Excel 2010 (or greater). Excel is a desktop standard, easy to use, easy to filter records, and designed to build visual presentations such as charts, graphs, pivot tables and informational dashboards. PCS has developed within the BI solution pre-built datasets accessing the core **Insight** and **Connect** data structures. Many solutions have the ability to export to Excel, with the PCS BI solution the data, reports and visual outputs are already in Excel.

### Evolution of Reports to Dashboards

Historically, reports are typically column and row sets of records created from raw data, but fail to deliver dynamic insights to the data. Dashboards on the other hand are more effective in delivering an important point, message, trends, and greater understanding of the underlying data. A well designed visual presentation will incorporate graphs, color, symbols, and other graphical tools to engage the reader.

### BI Definitions:

The PCS BI solution has been broken into specific components comprising the solution which includes:

- **Datasets:** Prebuilt queries to the PCS database
- **Reports:** Collection of column and row data or pivot tables bound to a dataset that can easily be sorted and filtered
- **Dashboards:** Visual interface providing at-a-glance views into key measurements relevant to a particular objective or business process
- **Workbooks:** Collection of common reports and dashboards contained in one Excel workbook.



# Business Intelligence (BI)

## Value to Utility Staff

- Access to information without the need to directly connect to the application or database
- Usable by all levels of staff, board, and management
- Reduces need to create in-house custom reports
- Excel is the tool employees feel comfortable using
- Allows staff to tailor dashboards to fit utility specific business requirement

## BI Groups

The BI solution is designed around similar workbooks cataloged into four categories or groups. The utility can license one group or a combination. PCS has developed hundreds of various reports, graphs, and informational dashboards. Any new workbook or dashboard added to a group will be included as part of the license. The groups include:

- Financials General Ledger, General Ledger Trends, Key Ratios and Financials
- Operations Accounts Payable, Inventory, Purchasing, Work Orders, Payroll and remaining *Insight* modules
- Consumer Analysis Customers, Revenue, Usage, and Services
- Meters/Transformers Meter and Transformer records

Professional services will be required to install, train, and support the various groups of workbooks and any additional workbooks added to a group.

## BI Access

The BI solution is usually deployed to a small number of users and published for required readers. User access is designed by the PCS installation team. Once established, the BI solution is easy to use and user friendly. Access can be granted to all levels of the organization including managers, supervisors, staff, and board members.



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