

CASE STUDY

Automating Crystal Reports with AutoMate Saves 20 Hours per Week for Appliance Distributor

For wholesale appliance distributor Echelon Home Products, generating and distributing reports for four different business divisions used to require at least 20 hours of weekly Crystal Reports work as well as wreak havoc among employees every Monday because of an all-day report-related network slowdown. That changed in 2008 when Echelon plugged into [AutoMate Professional](#). The software has allowed Echelon to process 110 weekly and 71 monthly reports unattended, run the most computing-intensive reports after hours, and streamline other chores including budgeting—all without writing custom automation programs. Using AutoMate is saving half of one IT salary plus thousands of dollars in coding. That in turn is enabling Echelon to put its money where its business is: keeping high-end refrigerators, cooktops and dishwashers moving out the door.

The Challenge

British Columbia based Echelon Home Products distributes luxury home appliance brands like Gaggenau, Thermador, and Bosch to retailers in western Canada and the northwestern U.S. Business data is maintained in four separate SAP BusinessOne databases—one for each division—and shared with sales and management personnel via dozens of weekly and monthly reports.

The impetus for transitioning out of manual report handling to some form of automation came from end users who had to contend with sluggish network performance once a week when inventory reports were being processed during the work day. Their complaints prompted the company to look for a way to set up the reports in advance and run them overnight. Systems analyst David Brown had even more reason to seek reporting relief.

"I spent most of the day every Monday and Tuesday navigating Crystal Reports to produce the reports we needed one at a time. That meant going through the same point-and-click sequence over and over," Brown recalled. "It just wasn't a good use of my time."

AT-A-GLANCE

ECHELON



OVERVIEW

Company	Echelon Home Products
Industry	Wholesale Appliances
HQ Offices	Richmond, British Columbia
Established	1982

CHALLENGES

- Report generation causing network slowdown
- Errors repeated throughout reports

SOLUTION

AutoMate Professional

RESULTS

- Saved 20 hours per week
- Improved accuracy
- Sped up year-end budgeting

The Solution

Brown's search yielded several Crystal Reports viewers and schedulers, but they had various limitations. One program that Brown tested, for example, would not allow him to define report parameters, extract needed data from his company's Excel spreadsheets, or build automations without coding. That product and others also were single-purpose Crystal Reports add-ons that lacked the ability to automate other business procedures.

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With AutoMate, however, Brown learned that he could automate hundreds of tasks simply by choosing plain-English commands like "Open Excel" and "Run" from a menu and dragging and dropping them into a window in the proper sequence. He downloaded a trial version and—in one hour—compiled the automation routine for running the first of 16 weekly inventory reports after business hours. The sequence instructed AutoMate to:

- Open an Excel file listing report names, company divisions and sales personnel.
- Select the relevant report and validate it to ensure that it has not already been run.
- Run the report by executing a series of keystrokes.
- Save the finished report in a specific folder on a specific server and/or email it to designated sales and company managers.

Brown then set up loop actions to run the same report for the other three Echelon divisions, built automation sequences for the remaining weekly reports, and assembled the routines into a single task to allow them to run consecutively without having to manually trigger each document.

Gradually, he **automated the monthly reports**, switched several monthly reports to weekly to equip managers with fresher information, developed new reports, and automated other processes as well, including a time-consuming, error-prone, annual budgeting task involving the creation of hundreds of password-protected Excel spreadsheets.

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The Benefits

For Brown, having AutoMate on duty is saving 20 hours of what he calls "mind-numbing, click click click" report generation and distribution on a weekly basis plus additional time on monthly reports and other tasks. It has also enabled him to avoid the expense of custom coding and associated code maintenance, and to dedicate his time to streamlining other IT activities.

For Echelon's sales managers and executives, the software is providing better information in a more timely manner. Weekly reports are now delivered on a firm schedule even if Brown is busy with other duties, new and monthly-turned-weekly reports are providing more comprehensive and more current data on business performance, and inventory reports no longer slow the network down because they no longer have to run during working hours. Year-end budgeting is also faster and more accurate, eliminating errors that sometimes were repeated through hundreds of spreadsheets.

For those reasons, AutoMate has become a mainstay of Echelon's infrastructure, just as the appliances the company sells will become a fixture in consumers' kitchens. It is also helping the company do what the Echelon slogan promises to do for its own customers, "live a little better," by putting IT busywork permanently on ice.



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