

Tomax leverages open source Business Intelligence to bring critical information access to retail operators.

The Company

Tomax is an independent software vendor (ISV) providing management solutions for the retail industry. With offices in Salt Lake City, Utah, the company serves more than 100 retail chains with its comprehensive Retail.net solution. Tomax is the only software solution provider exclusively serving the retail market with organic solutions spanning the entire Demand-Driven Retail Continuum, from planning and merchandising through execution in the store.

The company's Retail.net solution includes powerful tools for forecasting, point of sale, store systems, reporting and optimization. The suite is used by hundreds of global organizations—including Benjamin Moore & Co. and a host of other top-tier retailers—as a welcome alternative to costly, complex point solutions and monolithic ERP applications. Tomax also provides application hosting, software development and professional services including consulting, training, implementation and hardware procurement.

Challenge

In the fast-moving retail world, success depends on continuous, rapid-fire decision-making based on accurate information. Any enterprise retail management solution must, then, include a robust reporting framework and analytics capabilities.

“Retail managers live in a highly competitive world, where hours and minutes count,” says Virgil Fernandez, Chief Technology Officer for Tomax. “While they might occasionally engage in deep, time-consuming analytic endeavors, retail managers most frequently need fast answers on real-time business operations—at the lowest cost possible.”

It's also important that retail business users be able to retrieve information that consistently reflects the way their businesses are structured. “Relationships among people, organizations and processes are critical in the retail world,” explains Fernandez. “Our Performance Management solution—the monitoring, measuring and reporting toolset for the Retail.net solution—must deliver detail to the transaction level when it's needed, and also to aggregate by department, store, and region, along with many product layers down to the SKU level.”

The Retail.net solution would need business intelligence technology in order to enable report writing to allow simplified creation of custom reports – and also offer dashboarding, analysis and ad hoc query capabilities, all designed to reflect the underlying and expansive data model. Rather than distract its development team from its retail focus, Tomax began looking for Business Intelligence (BI) tools it could integrate with its solution.



Company:

Tomax

Industry:

Software

Solution:

Retail.net Solution

Results:

Complete, cost-effective information delivery, in every format and channel needed to acquire and serve leading global retailers.

FIND OUT MORE

Jaspersoft and its suite of BI products
jaspersoft.com

JasperSoft open source community
jasperforge.org

www.tomax.com

“Any enterprise retail solution should have an integrated, best-in-class reporting framework. The Jaspersoft solution provides that framework for the Retail.net solution: web-based reporting via our portal, the iReport designer, plus ad hoc query and integrated analytics. With Jaspersoft, we can deliver against all the requirements for even our most sophisticated customers, such as Ratner Companies.”

– Virgil Fernandez, Chief Technology Officer

Architectural fit was important. The Retail.net application had already been designed on a J2EE framework, employing the JBoss Portal solution as the end user presentation medium and embracing open standards, open source technologies and Java-based technologies. Ideally, a BI solution would also support Java APIs.

Economics also played a key role. Retail enterprises operate on thin margins, and Retail.net software pricing would need to be competitive. Open source technologies and flexible licensing would be crucial attributes of the ideal BI solution.

In choosing a BI partner, Tomax wanted proven—but highly adaptable—technology. Many commercial solutions certainly offered maturity, but also reflected long-standing design decisions that might limit flexibility and extension. Plus their high costs and restrictive licensing provisions were less appealing to Tomax.

Speed was a factor: Tomax had ambitious time-to-market and time-to-value goals. To this end, they sought BI technology that was easy to learn, easy to use, and easy to integrate.

Key design philosophies came into play as well. First, Tomax wanted to deliver consistency across all user interactions. To this end they embraced a single-sign-on design that would enable every part of the Retail.net application to be user- and role-aware, presenting views, data, and processes to users appropriately and consistently. The chosen BI technology would need security and authorization APIs that would efficiently support this construct.

Solution

Based on these criteria, the Tomax development team chose the commercial open source Jaspersoft Professional Business Intelligence Suite for its flexible licensing, its ease of integration with portal and security services, and embodiment of open standards.

“It was the right choice,” says Rafi Aslam, Tomax Application Development Director. “The Jaspersoft technologies were very easy to integrate and embed within our solution. We needed just minimal assistance from the Jaspersoft Professional Services team, and the resulting, integrated BI functionality works very well with the rest of our solution.”

The Tomax development team built portlets (portal “windows” which can be included in a given user’s browser-based portal viewer) around each of the key Jaspersoft capabilities: standard reporting menus, report scheduling, dashboard design and presentation, report design, analytics and ad hoc query.

“This is, in part, why the single-sign-on design decision was so important,” says Aslam. “Any portal had to be able to access any Retail.net functionality—including all the views of Jaspersoft functionality provided by the portlets we built. The solution references the user’s identity and role to determine which portlets, and which data, appear in his or her portal. In this way, the Jaspersoft assets are integrated seamlessly with the full solution.”

Retail.net solutions customers typically run between 50 and 100 standard reports—sometimes more—in an implementation. Data for reporting, analysis and ad hoc query are pulled from both Oracle and open source PostgreSQL data sources.

Many of Tomax’s customers leverage Tomax Hosting Services for application hosting, while some install Retail.net software on their own premises. The largest Retail.net solution installation manages more than 3TB of transaction and summarized data. Customers can engage their power users to design dashboards and customized reports or use Tomax’s Professional Services team.

Results

Integrating Jaspersoft technologies into the Retail.net application has enabled Tomax to achieve what’s most critical to their retail customers: providing precisely the reporting, dashboarding, analysis and ad hoc query capabilities needed. “Jaspersoft lets us connect to any data source and provide the snapshot views our customers demand,” says Aslam.

Fernandez is also enthusiastic. “Any enterprise retail solution has to have a reporting framework. The Jaspersoft solution provides that framework for the Retail.net solution, giving us web-based reporting via our portal, and the iReport graphical design tool which lets us create exactly what’s needed for each report. Combined with the ad hoc query capabilities, we have all the requirements covered.”

Choice of delivery channel is important, too, says Fernandez. “Business users can get at the rich data stored in Retail.net applications through portal, paper or email, in Flash or PDF, even on their handheld devices. JasperServer does all of this: it’s a rich tool, with the right APIs.

Aslam adds that, by leveraging the underlying Retail.net software data model, Jaspersoft reflects and reinforces the real-world business relationships and processes faced by retailers. “That means our customers have a real treasure trove of information—and they can mine it using Jaspersoft analytics, reporting and dashboarding.”

He also emphasizes the importance of real-time data availability. “We have customer dashboards that are refreshed every thirty seconds. It’s that important, at times, for business users to see how a retail promotion is going or how a certain store is performing or how a given product is selling.”

“Jaspersoft is a key value-add to the Retail.net solution, Fernandez explains. “We have received excellent feedback from the retail community regarding the value of the visibility to real-time information enabled by the Retail.net solution.”

“Jaspersoft adds to the Retail.net information delivery by allowing the user to define how they want to view data live, through dashboards, reports and ad-hoc queries,” concludes Fernandez.

Retail.net Solutions at work:

Ratner Companies Track Highlights, Lowlights.

Ratner Companies, the largest family-owned and operated chain of hair salons in the U.S., relies on the Retail.net solution to manage its 800 salons, 12,000 Stylists and diverse set of brands. Ratner’s focus is on enabling people—executives, managers and stylists—to meet their business goals and enrich their lives.

Ratner manages both salon services and product sales with Retail.net software, and places great importance on setting targets (in the form of business metrics) and tracking progress. This makes the Jaspersoft-powered Performance Management module of the Retail.net solution a crucial tool for the company.

“We have about 18 key metrics we want people to focus on,” says Tim Lemieux, Ratner’s CIO. “Depending on their needs, we show store, district and regional managers their performance through dashboards and reports—which help us present actionable information without a lot of extraneous content.”

Ratner managers monitor revenues by salon, product and service categories, and other rollups, while tracking loyalty card usage, employee production, and other measures.

Jaspersoft adds flexibility, adaptability.

Tomax’s initial Performance Management release required customized coding for every dashboard and report, and it was difficult to keep up with Ratner’s rapidly changing information needs. The companies worked closely together to determine how Jaspersoft technology would be used to eliminate this bottleneck.

“Now we’ll be able to make changes to dashboards and reports—or add new ones—very quickly,” says Jennifer Brown, Ratner’s Director of Salon & Web Systems. “We can do it ourselves, without waiting for Tomax to get to it. This will let us launch new metrics much faster, and more affordably, too.”

Lemieux points out the advantages: “With these dashboards, issues surface sooner and can be addressed more quickly—because managers can focus on what’s unusual, instead of wading through a lot of information looking for it.” Ratner executives also regularly create and distribute “Top 20” and “Bottom 20” reports, spurring internal competition among store and regional managers.

Lemieux’s sums up: “Ultimately, these [Jaspersoft-powered] Performance Management tools drive positive business change ... by making the business transparent.”

About Jaspersoft

Jaspersoft provides the most flexible, cost effective and widely deployed Business Intelligence suite in the world, enabling better decision making through highly interactive, web-based reports, dashboards and analysis. Leveraging a commercial open source business model, Jaspersoft provides end-to-end BI capabilities at a fraction of the cost of other vendors. The BI suite includes pixel-perfect enterprise reporting, ad hoc query, dashboards, OLAP and in-memory analysis, and data integration. Jaspersoft is the only BI vendor that enables companies to adapt to the new, virtualized world by providing a complete spectrum of on-premise, multi-tenant SaaS and cloud-based deployment options for both embedded and standalone business intelligence. Unlike traditional BI vendors, Jaspersoft is built on a modern, light-weight, standards-based architecture and offers greater vendor independence thanks to its open source codebase. Unlike niche BI vendors, Jaspersoft represents a safe choice with tens of thousands of production deployments across a wide range of industries.

Jaspersoft's open source business intelligence software has more than 11 million product downloads worldwide, 160,000 production deployments in 100 countries and over 13,000 commercial customers. Its BI suite is advanced regularly by a development community of more than 150,000 registered members. For more information visit: www.jaspersoft.com and www.jasperforge.org.



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