



# How to Use Business Intelligence and Real-time Reporting to Gain a Competitive Edge

Most companies struggle to pinpoint the reasons behind declining productivity, rising costs, or stagnant growth. Many deploy analytical tools in search of big data, gleaning some insights but rarely enough to immediately diagnose operational issues, identify trends, and spot opportunities.

Ujimatec's complete Construction Business Management Solution (CBMS) combines the power of its award-winning ERP technology partner, Acumatica with a customizable reporting engine and sophisticated business intelligence to present real-time company health analysis and personalized key performance indicators (KPIs) on each user's homepage.

Employees can automatically retrieve the information they need to thrive. No-code/low-code report development lets them point and click their way to creating personalized dashboards and an array of dynamic reports. They can rely on dashboards to find critical tasks and priorities and automated alerts to keep tasks moving.

Pulling from a unified database, Ujimatec reports put every team member on the same page with a single version of organizational truth while using role-based access to secure data.

Ujimatec helps leaders ascertain company health at any time by presenting at-a-glance views of real-time reports, charts, and dashboards. In addition to accessing mission-critical information and personalized KPIs, users can investigate issues and initiate action from the report. For example, they can build pivot tables to quickly analyze core criteria from multiple perspectives, drill down to understand underlying sources, and initiate tasks in response.

## INSIDE THIS eBook



This eBook examines how organizations leverage real-time reporting with business intelligence to accelerate growth and maximize operational efficiency.

# Business Intelligence Empowers Strategic Decisions

Virtually every department relies on technology to automate processes. But most fail to exploit its full value. Unless organizations can gather and analyze real-time insights from each system, they will miss vital opportunities to address problems and advance goals.

To continually track sales, expenses, production, and distribution, organizations must pull financial and product data from numerous (paper and electronic) sources and develop various business reports. Still, integrating diverse financial systems does not guarantee organizations will have meaningful insights at their fingertips.

*Ujimatec does.*



## POWERFUL INSIGHTS

Ujimatec leverages business intelligent tools, such as Microsoft Power BI and Tableau to:

1. Aggregate data from multiple sources
2. Extract actionable information for strategic and tactical decision-making
3. Present data analysis visually to stakeholders

Ujimatec's CBMS helps transform raw financial data into powerful insights by converting business intelligence into real-time reports and

dashboards, which optimize financial reporting and boost profitability. The system filters through data derived from multiple sources to produce real-time reports that rank products and sales regions by profitability or identify weak links in a supply chain.



## FINANCIAL AND OPERATIONAL TRANSPARENCY

Companies gain an end-to-end view of operations and customer activity. Ujimatec combines business intelligence with its centralized database, pulling data from internal and external sources. Dashboards present a wide array of vital information, including advanced financial features for deferred and recurring revenue, budgets, project accounting, contract or policy management, billing, asset depreciation, and payroll.



## ONE VERSION OF FINANCIAL TRUTH

In addition to consolidating all transactions and financial data across multiple product lines and business entities, Ujimatec, powered by Acumatica, ensures users have real-time access to one version of the financial truth.

*" The construction industry has been slow to adopt a digital transformation, and Ujimatec can facilitate that industry by integrating many different apps used today into a single version of the truth, and with strong mobile capabilities. They are able to solve similar industry issues across project focused companies needing Cloud computing technology. "*

**Curtis Maxwell | Partner Enablement Manager**  
Acumatica

[Visit website](#)

# Personalized Dashboards Ignite Innovation to Drive Business Results



Every day, employees waste hours hunting for meaningful insights to inform decisions and power key functions from managing inventory to supporting

customers and purchasing. Tedious searches drain creativity as well as productivity.

Ujimatec enables employees to do their best work wherever and whenever it suits them. Since the mobile framework delivers the same experience on every browser-based device, users can quickly respond to creative impulses and new ideas. They can turn an inspiring

conversation or nature walk into real-life problem solving by accessing Ujimatec's CBMS on their phone and going to work. Users can also seize random moments to view reports and perform follow up tasks, such as:

- Approving or rejecting purchases
- Entering & approving timecards
- Lifting or maintaining credit holds
- Identifying buying trends
- Review Project reporting & dashboards
- Making spending decisions based on cash, outstanding invoices, and inventory

*" The Ujimatec team is fantastic! They helped us with every aspect of our business. Our company has become more connected and aligned with everyone using one system. Since we went live, we have had more time and data available to focus on growing the business, our team has become more productive, and we can analyze our Projects in multiple perspectives."*

**Svetlana Mihailova | Owner  
Glass & Window Specialists**



## **TAILORING BUSINESS INTELLIGENCE TO ADVANCE EMPLOYEE GOALS**

Ujimatec surpasses traditional reporting systems by personalizing intelligence reporting for each user. Users can decide how they want to monitor relevant financial, operational, and organizational information. With multiple reports or a consolidated dashboard on their homepage, they can instantly view standard reports to analyze real-time trends and KPIs specific to their role or design reports to match their preferences.

Personalized reports help users view historical information, identify performance and labor trends, calculate risks, and seize opportunities. Drill-down capabilities let them understand contributing factors.

Employees can choose report formats to match their priorities without creating or adjusting code. They can select a bar chart to track sales progress, a pivot table to analyze revenue numbers from different angles, and pie charts to view marketing campaigns. They can even elect business tiles to understand multiple elements simultaneously.

# Robust Tools Maximize Reporting Flexibility and Employee Engagement



If users cannot easily generate reports that advance their business objectives, they will abandon the reporting system. Finance leaders need on-demand reports that help them keep up with cash flow, outstanding balances, and projected revenue and let them drill down for details. Without them, they risk financial chaos and turn to manual research for help. Ujimatec's robust reporting tools simplify report creation and equip employees with what they need to rapidly respond to evolving demands. Since all reporting are included, they honor security rules and offer customization options.



**Standard reports and templates** get users up and running quickly with reports on vital information and the ability to define relevant reporting parameters.



**Report Designer** lets users access data and create forms like invoices and pick lists. They can preview reports and switch between design and preview mode.

**Generic Inquiry** enables users to gather data with smart suggestions across multiple modules. Use this data to create widgets that track specific criteria, such as available inventory and open or pending change orders, sales numbers per salesperson, region, and product, hours by employee and many more.

**Customizable Wikis** help business unit leaders document business processes and teach employees about system applications and features.



**Multi-dimensional Reporting** breaks down data by specific criteria or dimensions, such as product line, store, location, and department. Therefore, employees can evaluate information from different perspectives, spot patterns, and exceptions, and find root causes.

*All reports follow Ujimatec's data security rules and support customization.*

**Multiple Formats** Users can produce reports in HTML, PDF, Excel, or Word formats and share them internally in Acumatica modules or externally through email. They can also export them to third-party tools for additional analysis.



**Personalized Homepage** Ujimatec alleviates employee frustration by presenting personalized data in colorful, easy-to-digest formats. In addition to viewing pending tasks and KPIs, users can click through to understand causes and take action—all from their homepage.

# Audit-Ready Reporting Helps Prove Compliance on Demand



Compliance efforts drain budgets as organizations scramble to support changing federal and state regulations. Instituting comprehensive compliance practices alone cannot protect companies from the financial and reputational risk of non-compliance.

Organizations must also be able to demonstrate compliance on-demand or face hefty penalties. In many industries, especially Construction, poor compliance ratings can severely damage an organization's reputation and jeopardize future business.

Ujimatec equips organizations with the reporting tools they need to prove compliance at any time. Users can tailor compliance reports for specific regulations with little or no programming.

The ERP platform connects with external data to build reports, dashboards, and business processes that can demonstrate industry compliance initiatives, such as GDPR, SOC 1/SSAE 16/ISAE 3402, SOC 2, and other regulations.

Seamless integration with Ujimatec's financial planning & analysis/performance management (FP&A / CPM) partner Prophix, to tie project forecasts, company budgets and other performance metrics along side actual transactions and real-time project costs.

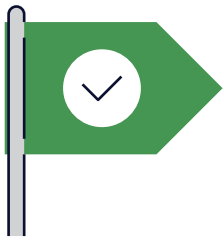
Ujimatec can present real-time reports on the user's dashboard, generate them on demand, or produce them according to a set schedule. When auditors visit, they will immediately see proof of compliance and be able to drill down for a complete history.

In addition, Ujimatec helps secure data. By tailoring information to each user's information needs, role-based reporting restricts unauthorized access to customer and organizational data. Data privacy embodies an essential compliance requirement.

*" I have worked with Louis, co-founder of Ujimatec, for a number of years as Controller at Kasisto, Inc. Louis helped us configure our complex multi-currency consolidation software for our entities. His knowledge in Accounting has been invaluable in helping us with our solutions. Louis' technical acumen is always spot on, and his communication style makes him a pleasure to work with. "*

**Helen Rosen | Controller**

**Kasisto Inc.**



# Conclusion

The answers to a company's most pressing challenges are often buried within mounds of data scattered throughout its financial and information technology systems. To uncover them, organizations must collect and transform high volumes of data into meaningful insights that provide a live window into their operations.

But finding the right answers alone will not promote profitability. Organizations must make complex data digestible at first glance. If not, they cannot seize growth opportunities or proactively resolve hidden problems.

Ujimatec delivers the information companies need to grow revenue, control expenses, and make innovative decisions every day. By combining a best-in-class, success centered ERP system with a customizable, reporting system and leading business intelligence, Ujimatec aggregates and converts vast amounts of raw data into mission-critical insights.

Gain greater insights and accelerate decision-making with reporting tools that deliver customized views of the business to your homepage. Ujimatec keeps top priorities and responsibility in front of each user by pushing multiple KPIs, pending tasks, and reports on their home dashboard.

Leaders use real-time dashboards to quickly diagnose company health, identify performance trends, and avert disasters. They can choose from bar charts, pivot tables, and dashboards to visualize mission-critical information at-a-glance.

Employees can immediately understand their personal KPIs and how they affect the overall organization. Automatic alerts and customizable reports show them what they need to do and when they must complete it, while drill-down capabilities help them analyze contributing factors and determine the best course of action. Best of all, users can act immediately on Ujimatec's integrated reporting system.

With Ujimatec, growing organizations take reporting and analysis to the next level, moving beyond balance sheets and cash flow statements to outcome-driven insights.





## About Ujimatec

Ujimatec provides customer success & value driven software solutions to accounting, finance & executive teams within the construction industry across North America. Today, Ujimatec's portfolio of solutions provide an integral suite for business management, empowering users with intuitive, integrated, cloud-based products. Ujimatec's customer success motivated team are dedicated to providing the ultimate customer experience and to making people's lives easier.

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