LeanMIS Reference
2018

Investment and HR Planning on SAP

"LeanMIS investment planning combines two advantages: the familiar Excel and centralized, secure data storage."

Thomas Bertl, Head of Controlling, ÖAMTC Air Rescue

Customer profile
ÖAMTC is the largest mobility club in Austria. More than 3,800 employees across Austria operate 113 bases, 8 driving training centers and 16 emergency helicopter locations.
More than 2.1 million members rely on the services of the ÖAMTC.

The challenge
The annual investment planning was a time-consuming process with media disruptions. In the complex organization of the ÖAMTC, changes could have effects that were not immediately apparent, especially in the hot planning phase. This is why the company wanted to have an up-to-date, centrally controlled planning system with fully electronic, automatic workflows. If possible, without too many changes to the established workflows.

Solution
All data has been moved to the database. LeanMIS combines the familiar and proven Excel interface with the central, secure database. Planning can be controlled centrally, including user rights.

Results
LeanMIS fills tried and tested Excel files from the central database. Users who are on their own at remote locations can plan as usual and do not have to learn a new tool. Management always has an up-to-date overview and can intervene to provide support. Security is consistent. There are no more media disruptions.

Software and services

Microsoft Excel
Microsoft SQL Server
SAP

Investment planning relies on tried and tested Excel know-how, and maintains many years of investments in Excel solutions.

Unlike the introduction of a completely new technology, there was no need to reinvent the bicycle a second time. This saved money, errors, nerves and time. The LeanMIS planning tool with its Excel components, tried and tested over many years at the ÖAMTC, could be put into practice quickly and painlessly.

ÖAMTC was able to develop and test the user interface in Excel itself, independently of external software developers. This has led to accuracy of fit, speed of development and, above all, user acceptance.

Integration in Active Directory allows the IT department to create users centrally and control their authorizations. User rights can be changed immediately throughout the organization, making the ÖAMTC audit-proof.

Excel's read-only cell formulas automatically document the logic behind the data. The system is transparent and not a black box. Planners can better recognize correlations and potential for improvement.

Team LeanMIS responded quickly to change requests, as they occur during the introduction and optimization of new software.

Key figures

Initial project:	6 months
Commissioning:	2018
Users:	200+

Improvements

Automatic preparation of planning documents
Automatic calculations and plausibility checks in the planning form
Central authorization system
Central storage and secure electronic distribution of planning
Consistency without media disruptions
Workflow with multi-stage approval process
Overview of progress in the planning process
Less effort, higher quality

About LeanMIS

LeanMIS is an Excel-based BI solution for industry, banks and real estate managers. LeanMIS aggregates data from many data sources (SQL, ERP, CRM, files, cloud) with as little redundancy as possible, manages reports and ensures their accuracy. Users can create individual reports ad hoc with Excel. LeanMIS is also an Austrian chisches software company based in Vienna.

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Excel planning mask: familiar to every user.

The planners find their way around immediately and can use the read-only cell formulas to determine checks and intermediate results at any time. Plan values are entered in purple cells, all other cells are read-only.

Workflow: By clicking on the green checkmark at the top left, LeanMIS writes the planning step to the data-base and notifies the next planner(s) for this cost center, such as supervisors.

Clicking on the red X rejects the planning step and prompts the previous planners to make improvements.
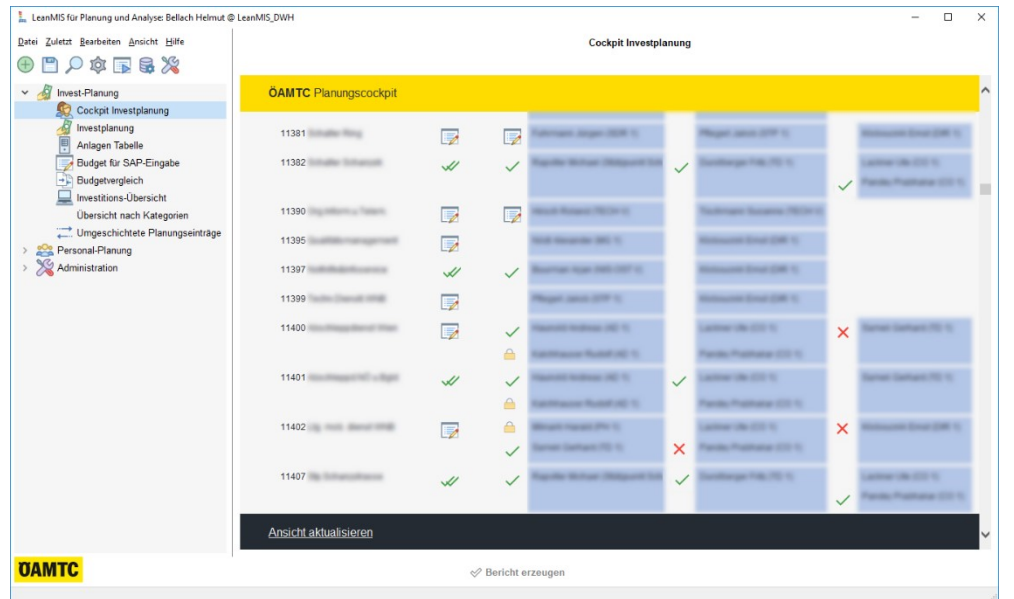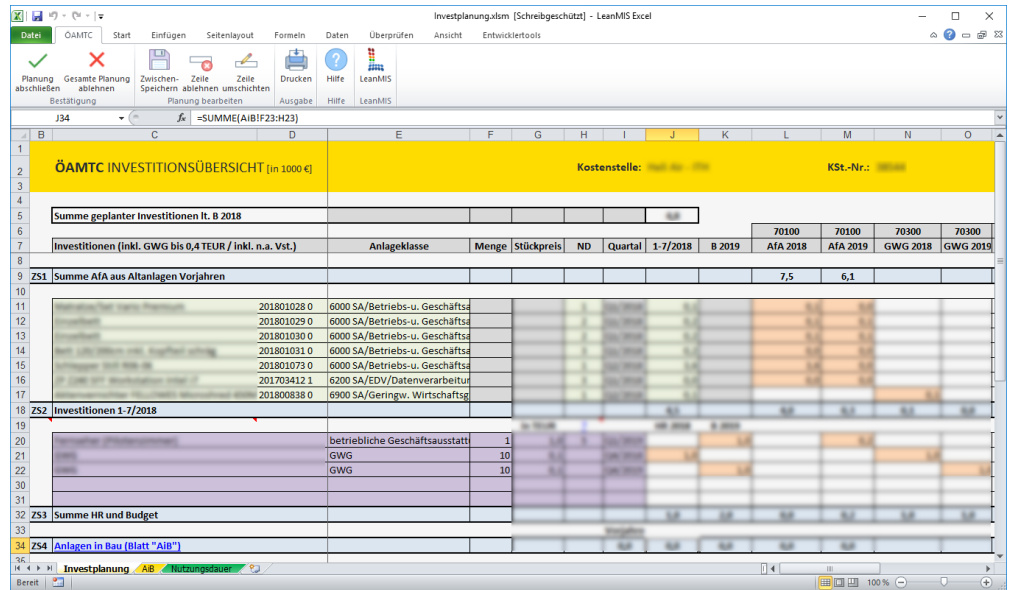

The **planning cockpit** shows the status of investment planning for all cost centers:

 Which cost center is fully planned (double green checkmark)?

 Which one is in progress (pencil)?

Which planner has completed their work (green tick)?

Where are there rejections and the previous level has to plan again (red X)?

In the **workflow editor,** managers can intuitively define who plans which cost center and to whom reports are sent at the click of a mouse.

Deep planning hierarchies are possible, and one or more managers can be assigned to each planning level.

In the picture, the supervisor is moving a planner to another level in the planning hierarchy.