



How KNIME Helps Finance at BGIS Work Smarter

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Welcome

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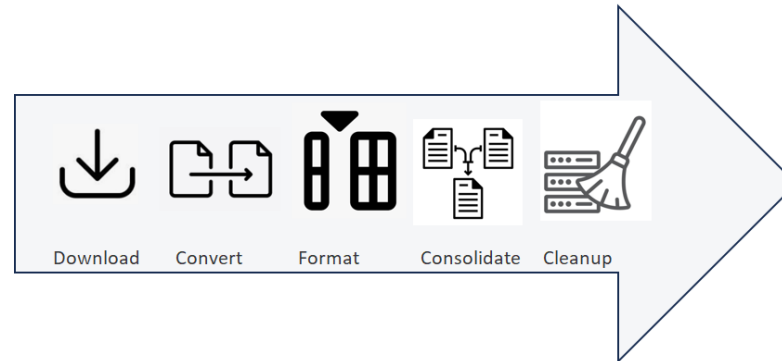
Agenda

- Why KNIME at BGIS Finance
- KNIME Journey at BGIS Finance
- Success Stories
- Q&A

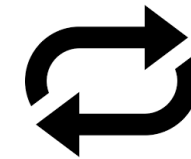
THE PROBLEM

- Finance BIGGEST area for Improvement from past surveys was in Tools and Processes

- Work in **Manual**



- Work is **repetitive** – Run the same manual process every week/month



- **Takes too long** to download reports

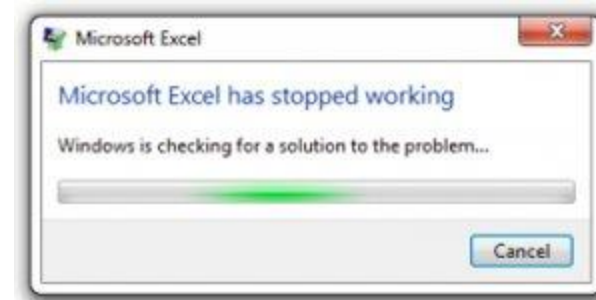
CALCULATING: (4 PROCESSOR(S)): 40%

- **No time for Analysis**

- Check and **recheck for Errors**















- Excel cannot effectively handle **large volumes**



POSSIBLE SOLUTIONS

The Ask → Improving Finance daily processes by leveraging technology

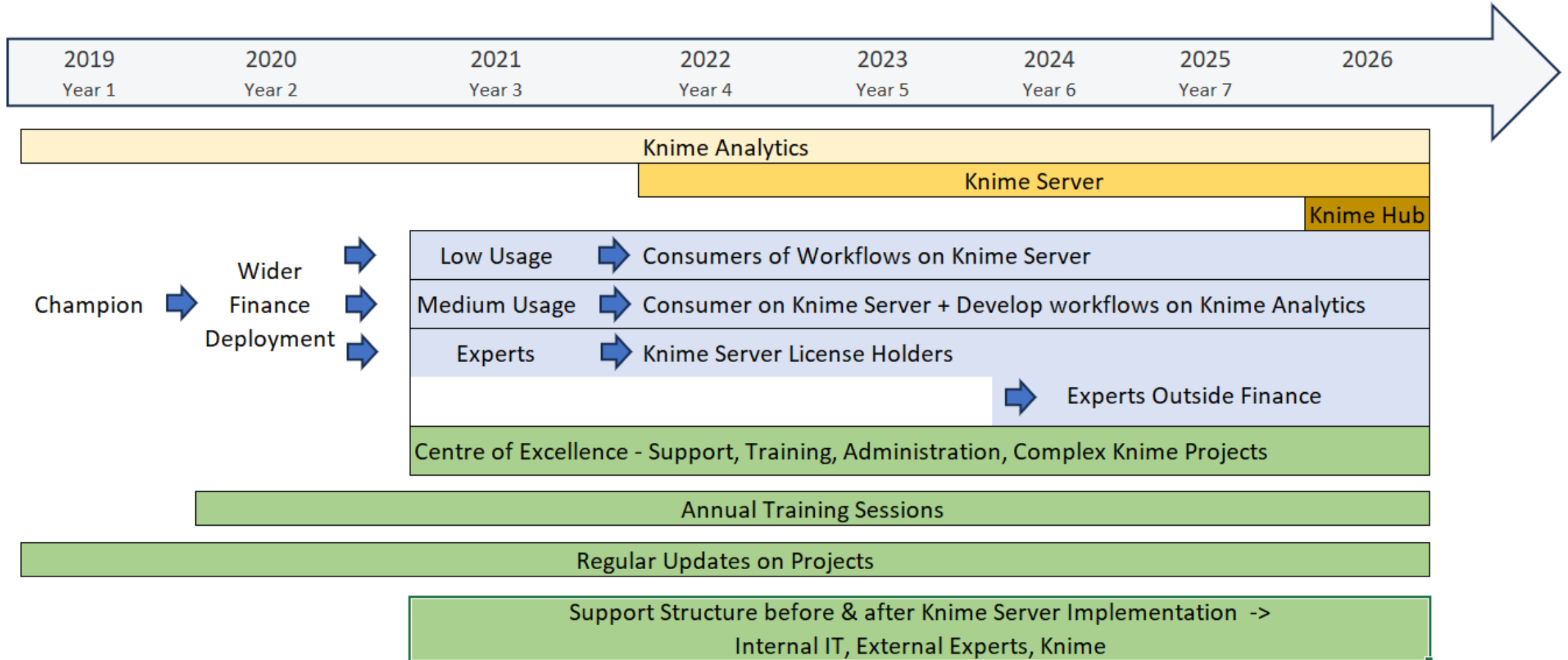
	SHORT LEAD TIME	COST	PAYBACK NOW	FLEXIBLE FOR MULTIPLE PROCESSES
In-House IT Solutions				
Off-Shelf Software for Accounting Processes				
????				

Why KNIME at BGIS Finance

- Proof of Value → Initial Champion and Expert
- Easy to deploy
- Easy to learn for Finance Team Members – Understandable, intuitive interface
- Auditability – Solid Documentation features
- Centrally Managed Workflows
- Connectivity to Data Warehouse
- Broad Utilization possibilities Finance
- Solid Support Framework



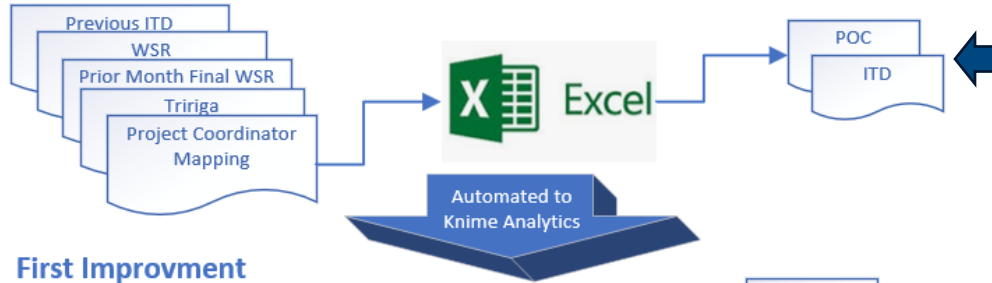
KNIME Journey at BGIS Finance



THREE SUCCESS STORIES

#1 - Percentage of Completion (POC) for Revenue Recognition

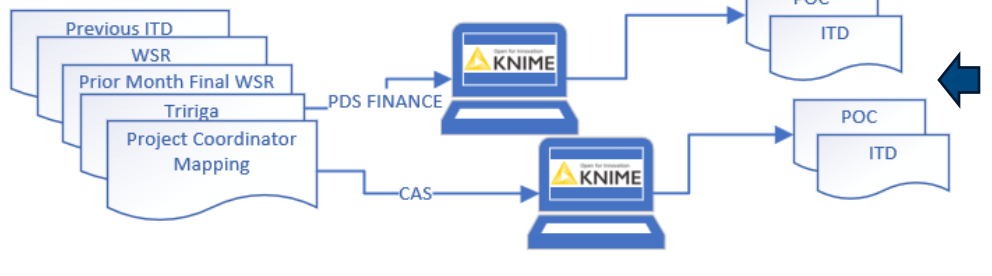
Original Process



ISSUES

- Manual Excel Process to Calculate Forecast
- Time Consuming
- Prone to Error
- Inability to easily update for changes
- High Level
- Not easy to Support

First Improvement



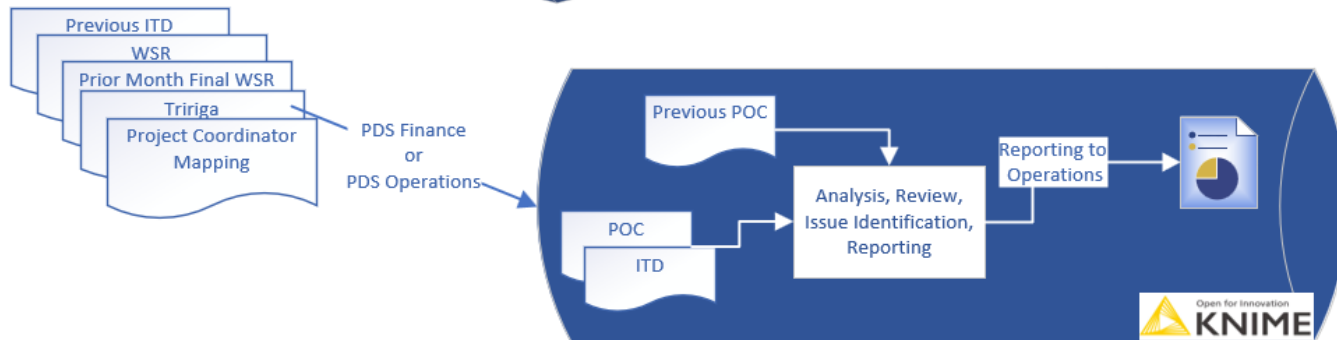
BENEFITS

- Forecast Calculation done in Knime Analytics; Automated, Supportable, Dynamic, Identify and resolve data integrity issues

ISSUES

- SOX controls required both PDS and CAS to run calculation – wasted resources

New Process



ADDITIONAL BENEFITS

- Enhanced SOX control, CAS no longer required to validate.
- Version Control, Improved Auditability
- PDS Finance Analysis, Review, Issue Identification Automated
- Reporting to PDS Operations Automated/Self Serve

35 hrs per month
420 hrs Annual Time Savings

Benefits!

20 hrs per month
243 hrs Annual Time Savings



Benefits!

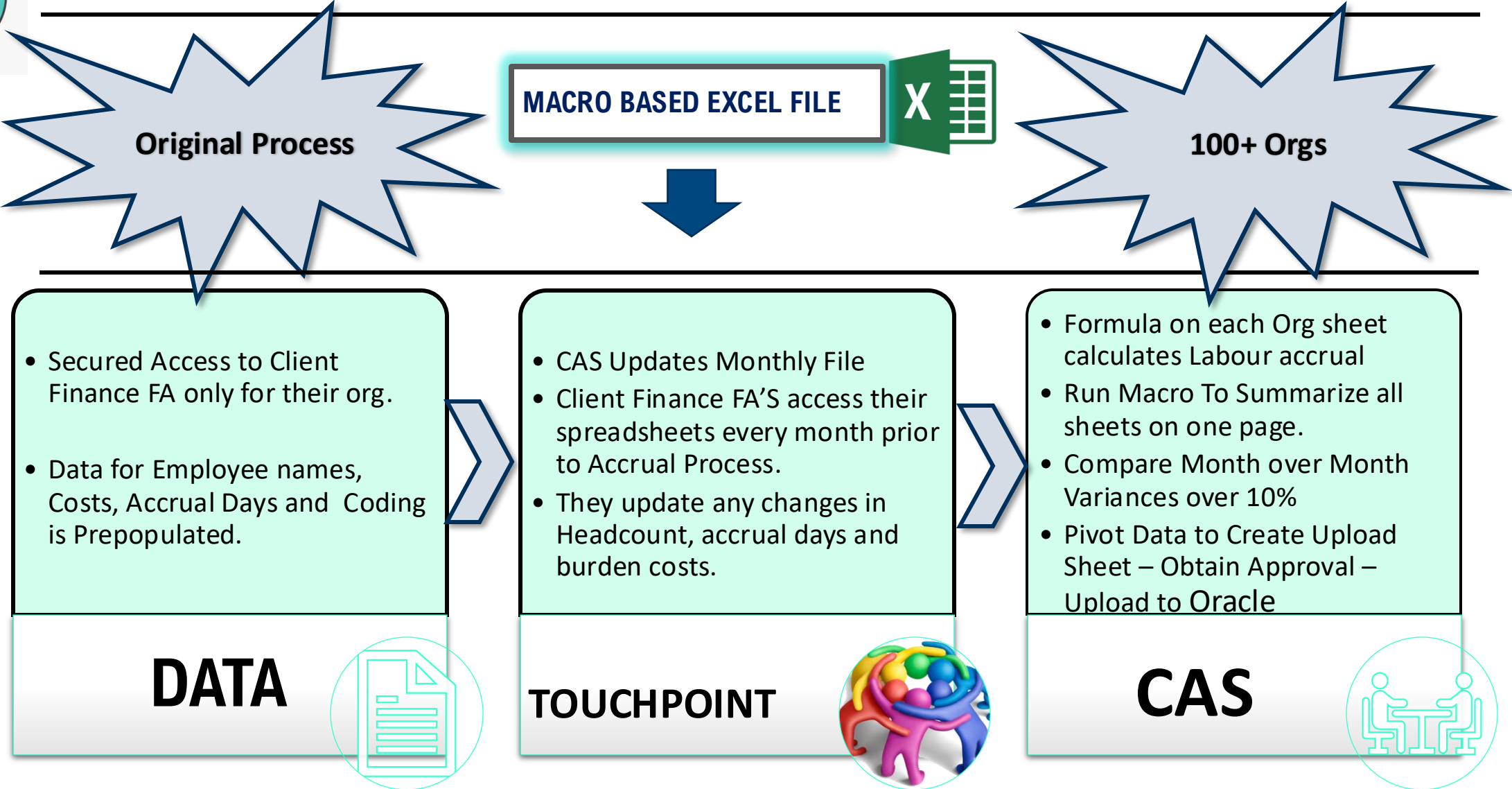
#2 -Automated Labour Accrual

**Showing full presentation of the regular updates on Knime Projects to BGIS Finance Team
< PROOF OF VALUE**

Project Overview



Objective: Fully Automate CAS Labour Accrual Process, across 100+ Organizations.



Project Overview



CHALLENGES OF ORIGINAL PROCESS



Burden to FA'S

Involvement of Client Finance Teams to manage changes – Burden on their time.

Unsustainable

Macro Based Shared Excel File with Security Features – Heavy, Unstable, & Unsustainable

Administration

Manage changes in secured file due to turnover, or new scope – provide access, & data sheet

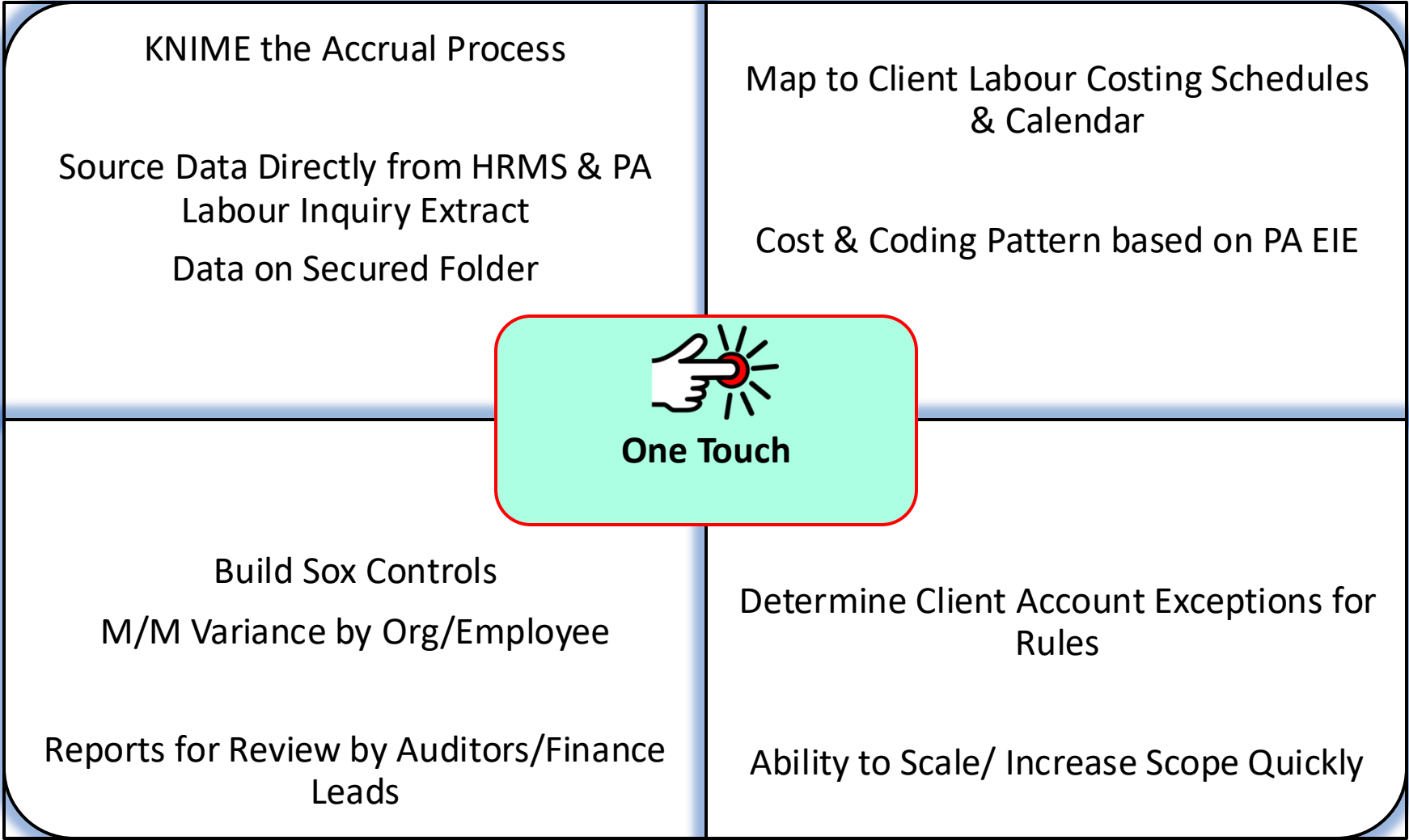
Risk of Errors

Dependence on manual updates by Client Finance Teams leads to errors or outdated data

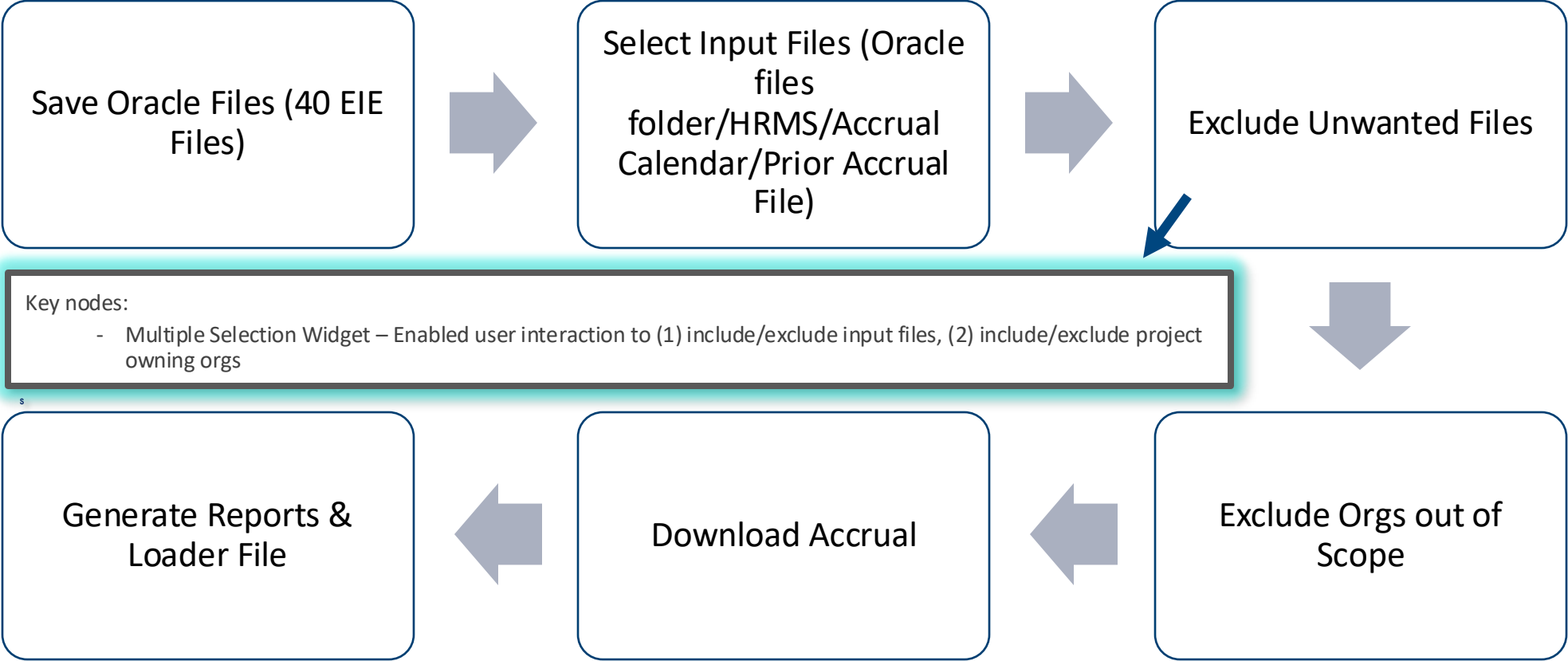
Time Involved

Time Consuming – Takes 1 Day for CAS + 1.7 days for time spent by Client F.A.'s across 100+Orgs

Project Plan



KNIME Solution ➔ 60+ Rules



Rate (\$)	Weekly Hours	# Days
EIE Report	HRMS Report	Accrual Calendar

Accrual Amount = (Rate) x (Hours/week) / (5 days) x (Accrual Days)



Project Status



COMPLETED, IN PRODUCTION JUNE 2022

20 hrs per month
243 hrs Annual Time Savings

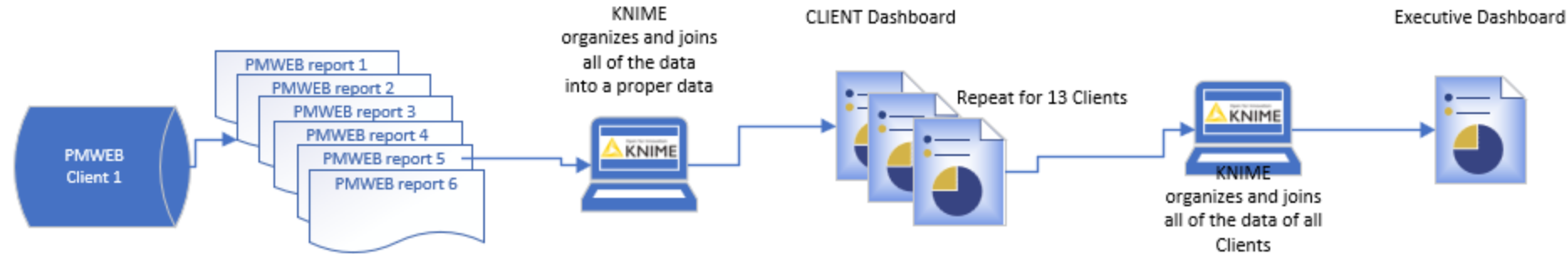


- **EFFICIENCY** - Involvement of 100+ Org Finance Teams Eliminated
- **TIME SAVINGS** : Total 2.7 Days/ Month (CAS saves 1 day & Client Accounts save $50 \times 15 \text{min} / 60 = 1.7$ days per Month)
- **CHANGE MANAGEMENT** : CAS no longer needs to spend Adm time on managing changes due to scope or role changes.
- **SENSITIVE INFORMATION** Accrual reported by Employee Number Vs. Employee Name
- **AUDIT COMPLIANCE** - Reports available for Finance Leads, Auditors – easier M/M Comparison & Analysis
- **ERROR REDUCTION** : In previous process, certain client groups did not have updated costs/ pay increase/turn over changes/Coding or correct working hours – Now based on HRMS and EIE – Labour Inquiry Extract
- **SCALABILITY** – On stabilization, we can quickly include US Accounts & Other Groups can use the KNIME Workflow.
- **STANDARDIZATION** - Most variation between accounts were eliminated.
- **VALUE ADD TIME** – Client Finance FA's can spend time on more value- add activities.
- **KNIME SERVER** – Easy to schedule, Independent Workflow

Expanding KNIME outside of Finance - Project Delivery Services

- ❖ **Flows on server: 50 active flows**
- ❖ **Accounts supported on server: 13**

➤ Knime Flows for Client Dashboards, Executive Dashboards – 13 Clients



- KNIME flow archives the relevant PDS data daily to allow for historical data to be analyzed as needed
- KNIME flow to capture when PMWeb forecast periods change to ensure data is captured at the correct time for proper monthly reviews
- KNIME flows made to combine and organize data to enable daily PowerBI reports out to team members
 - o daily project reports
 - o daily project assignment requirements
 - o forecasting status
- KNIME flows are used to read Snowflake data where available versus manually creating reports in Snowflake

Expanding KNIME outside of Finance - Project Delivery Services

1-2 FTE

Benefits!

“At the moment I’d say KNIME server is taking the workload of a person or two just in having the flows run automatically and send out reports or power the dashboards.”

Client #1 - Team member would run a KNIME flow manually each morning and take 30 – 45 minutes to run and send out, moved flow to the KNIME server and it runs twice daily and sends notification automatically once completed ← **ELIMINATE MANUAL INTERVENTION**

Client #2 - Team member would manually download files, sort and join in excel, format and then email to a group of people. We now have the files go to a X drive folder every morning, KNIME reads the file, joins and formats and writes to a teams folder. The PowerBI report service reads the file and automatically emails to the required team member every morning. ← **ELIMINATE MANUAL INTERVENTION**

“In general KNIME and KNIME server specifically saves a lot of time for the PDS team and enables us to power dashboards for all PDS accounts, we’ve created it in such a way also that if a new account comes on board we can add that account into our existing flows within an hour and we are ready to standup the standard dashboard for the account.” ← **SCALABILITY**

Q&A