

# NEEDS ANALYSIS

*For Guggenheim Digital Media*

*ERP Business System*

*Great Plains Dynamics*

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Definition of Needs (or “Gap” Analysis): A technique that a business uses to determine what steps need to be taken in order to move from its current state to its desired, future state. Also called need-gap analysis, needs analysis, and needs assessment. At its core are two questions: "Where are we?" and "Where do we want to be?" The organization must fill that gap to survive and grow.

Note: Great Plains hereafter referred to as “GP”

Purpose of this study: To figure out and implement solutions to problems in a timely and cost effective manner.

## **Example**

Step 1: Identify the challenge you’re trying to tackle.

Step 2: Identify where you are right now.

What are you currently doing (or not doing)?

Step 3: Identify where you’d like to be over a specific time frame.

Product Functionality/Features — We’d like our product to have industry leading features by 2013.

Step 4: Identify the gap between where you are and where you want to be.

Product Functionality/Features (let’s use Web site as an example) — The gap is that you’d like to have the following features by 2013: a blog, a sign-up form to let visitors follow your business on Facebook and Twitter and a way for customers to buy products directly.

Step 5: Determine how the gap should be filled. The “3 M’s”

**Manpower**-The people resources needed.

**Materials**-The automation or technology needed, as well as its financial cost.

**Minutes**-The time needed to complete the project.

## **Issue: Current GP Smartlist filter limited to 4 selections maximum.**

**Step 1:** Identify the challenge you're trying to tackle.

Current GP Smartlist limited to 4 selections maximum.

**Step 2:** Identify where you are right now.

The company previously purchased Advanced SmartList by Encore Business Systems. The product has an advanced filter but it does not work as expected. This was confirmed by Dave Gretta conversation with Encore product support team. The only redeeming quality of the current Advanced SmartList is that it greatly reduces the time to export data to Excel, which SmartView also accomplishes at an even faster rate. Additionally, users have a timely workaround where they do separate Smartlists filters and manually combine in Excel.

**Step 3:** Identify where you'd like to be over a specific time frame.

Want to be able to filter by unlimited number of filters in SmartList. Using various filters like: and,or,between, ...etc.

**Step 4:** Identify the gap between where you are and where you want to be.

The gap is that users would like to be able to perform multiple filters using "And/Or" logic.

The sample below is from a Account Transactions filter using SmartView, which was intalled and tested on our Test server using Billboard Brand "21":

Or+

And +

[Brand] Equals 21

[Main Account] Is between 60000 and 61000

And+

[Brand] Equals 21

[Main Account] Is between 64000 and 64999

**Step 5:** Determine how the gap should be filled.

**Manpower**-The people resources needed.

Dave Gretta can complete the task.

**Materials**- The automation or technology needed, as well as its financial cost.

Need to purchase SmartView from eOneSolutions. Cost is \$1,850.

**Minutes**-The time needed to complete the project.

20 minutes. This is the time needed to install the product on the server. Then will need about 10 minutes to install the software on each individual workstation. One thing to note is that the SmartView product claims to be able to upgrade most existing SmartLists but it doesn't promise. I found the upgrade didn't work well and that it would be easiest just to manually key. Plus, SmartView and be used in parallel with the native SmartList.