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Portal Based Financial Reporting System for PeopleSoft Solution

Situation

After migrating financials to the PeopleSoft/JD Edwards platform, the client determined that an enhanced financial reporting system was needed to dramatically improve the timely dissemination of critical information needed to better manage their business. The reporting system would have to support all levels of management from locations throughout the USA, with minimal IT support but maximum security and integrity.

The key challenge was delivering easy-to-use and customized real-time reports to their organization. The reporting capability provided in the base system required extensive training and were too time-consuming to execute.

The goal was to create a user friendly system that delivered real-time access to accurate and current financial reports based on the most recent information entered into the PeopleSoft system.

Solution

Enable Consulting, LLC. was engaged to create an architecture that would improve report distribution across the organization and allow reports to be tailored depending on a users role/function.

Enable utilized its SCOPE™ planning model to gather customer requirements and identify the critical success factors. The SCOPE™ planning model blends facilitation techniques with ideas-mapping software to produce a result that involves the project team from the start. The results from the planning model included a detailed feasibility evaluation, needs assessment, architecture, and project plan used to complete the financial reporting system. To accomplish this, Enable employed a portal platform to provide the role-based access required to personalize the reports delivered to a user based on their function and department within the organization. A data staging and integration environment was created within Microsoft SQL Server to house the necessary PeopleSoft data used to create the appropriate reports. Crystal Reports 9.0 and the Report Application Server was then employed to deliver web-based reports to users through the Portal.

The solution provides tailored reports delivered nightly based on the role a user has within the organization and also real-time reporting capabilities to support ad-hoc requirements.

Benefits

- Information is tailored based on role and function within the organization
- The field can now access PeopleSoft information directly from a browser
- Reports are distributed in real-time based on current information
- No changes were required to the PeopleSoft implementation

For More Information

Contact the Enable Consulting, LLC. at 215.540.9655,
e-mail info@enableconsulting.com or visit our website www.enableconsulting.com.

Solution Overview

Customer Profile

A large commercial realty organization based in suburban Philadelphia.

Business Situation

A new ERP installation requiring reporting capabilities to the field.

Solution

A report distribution portal was created.

Benefits

- Information tailoring
- Real-time capture
- Field access to reports

Software and Services

- WebSphere Portal 5.0
- Microsoft SQL Server
- Crystal Reports 9.0

Key Activities

- SCOPE based feasibility study & needs assessment
- Re-engineering of report creation and information delivery process
- Development of user friendly, role-based architecture