

Keane Client Story:

Industry: Financial Services

Offering: EPM/GRC | SAP BusinessObjects Planning and Consolidation System Upgrade



Keane's SAP BusinessObjects Planning and Consolidation Upgrade Enables Financial Reporting Firm to Enhance Worldwide Planning

Keane upgraded Financial Reporting Firm to the latest version of SAP BusinessObjects Planning and Consolidation, significantly enhancing reporting capability without disrupting operations.

Abstract

This Boston-based financial reporting company decided to upgrade its OutlookSoft application to the latest version of SAP BusinessObjects Planning and Consolidation (BPC) to take advantage of new product functionality and ensure continued software support. It also wanted Keane to design custom extraction packages and incorporate its customized drill-through feature worldwide. The enterprise required that work be completed with minimal disruption to its small staff.

Challenge

Our client needed to upgrade to the latest version of SAP BPC to leverage

enhanced product functionality and ensure continued software support. Turnover within its tiny, three person staff left only one team member knowledgeable with the existing system. The client's staff was heavily burdened by the demands of the existing Outlooksoft users, the monthly financial close, and the ad hoc reporting needs of both upper management and the parent firm.

Our client's existing application was experiencing performance issues due to the size of the legacy database and aging software. For example, it took the existing application up to 60 minutes for maintenance processing. In addition, the company's custom, drill-through feature, which was a critical requirement allowing them to see transactional details as well as PDF

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images of invoices, was becoming obsolete due to changes in the product by SAP.

The existing financial platform was also hampered by several technical challenges. First, the latest version of Citrix was being rolled out to all users worldwide, which prompted IT to build all servers under Windows 2008 and Microsoft Office 2007, neither of which was officially supported by SAP for the older versions of Outlooksoft and BPC. Complicating things further, our client had recently performed a major upgrade of its Oracle ERP system that was the source data for Outlooksoft. Finally, the company's network infrastructure was in the process of being completely reorganized, resulting in stringent requirements for application redundancy (i.e., disaster recovery) and application load balancing to ensure performance.

Solution

Keane's Global EPM/GRC practice provided our client with unique upgrade tools, custom software components, and certified training consultants. Keane was able to adopt an implementation strategy for our client so that disruptions to the client team members and their hardware resources were minimized.

For example, Keane was able to provide immediate software installation on a virtual development and production server environment via remote connection for the development, production and disaster recovery environments. A certified Keane trainer was on-site prior to the upgrade kickoff

to provide Keane's SAP BPC administrator "boot camp" training. A Keane Principal Consultant kicked off the project by using Keane's proven upgrade implementation methodology to prepare a detailed project schedule and deliverable list.

Keane used a customized approach based upon SAP's ASAP methodology, and incorporated its own implementation tools, programs, and templates. As part of this effort, Keane's project team leveraged SAP's automated BPC upgrade software tool, which automatically converts the legacy Outlooksoft database into the new BPC schema. This tool reduced the implementation time of the upgrade by over 50 percent. Since the automated upgrade tool worked against a database backup, there was no need to load and recalculate metadata and data, eliminating the potential for errors due to manual calculation, aggregation and currency translation.

The client's application contained a number of custom data extraction packages that pulled various data from the Oracle ERP into Outlooksoft. A Keane technical consultant recoded all of these customized data extraction packages to replicate their functionality while retaining the look and feel of the original packages and providing improved portability and performance. In addition, Keane built a new package that directly pulled manually-entered adjustment data from the existing Outlooksoft application into the new BPC application. This new functionality, which was not in the original project scope, eliminated the need for client staff to make

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time-consuming double entry of adjustments during the several months in which the legacy and new platforms operated in parallel.

Keane consultants also re-tooled the existing drill-through feature, preserving the required functionality and enhancing the user experience. In the new application, users outside of North America can now, for the first time, see the PDF images of invoices. In addition, invoice viewing can now occur in both web reports and Microsoft Excel reports, allowing users to save hard copies of the invoices for attachment to reports.

Results

Keane's upgrade implementation strategy ensured that our client received all the added functionality and features of the latest version of SAP BPC with minimal reliance on client technical resources or staff. For this financial reporting firm, Keane was able to:

- » **Complete the upgrade on time and on budget:** This was done by executing the Keane upgrade implementation methodology for BPC and by using the SAP BPC upgrade tool.
- » **Deliver virtual, load-balanced production and development and disaster recovery environments:** This was done without interrupting existing financial reporting and planning.

- » **Enhance data extraction, transformation and loading:** Keane rewrote existing packages with a more powerful and maintainable format while keeping the same look and feel.
- » **Provide value added functionality:** This was accomplished by eliminating the need for client staff to make time-consuming double entry of adjustments during the several months of parallel operations.
- » **Improve the end user experience:** Providing PDF invoice viewing to European users and the ability to view invoices from Excel.
- » **Reduce maintenance processing time and ease future upgrades:** This was accomplished utilizing the new version's capabilities and eliminating unused records. The old application processed in 60 minutes while the new application processes in less than 10 minutes. The new system is also 100% SOA which will ease future modernization efforts.

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About Keane

Keane, an NTT DATA Company, is an IT services firm headquartered in the US with more than 12,500 professionals worldwide. For 45 years, Keane has been an Application Services specialist with distinguished project management credentials. Today, we offer a flagship suite of Application Services, as well as Infrastructure and Business Process Outsourcing solutions delivered through onsite, nearshore, and offshore resources.

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