



MCFTECH SOLUTIONS

Case Study

FINANCIAL MANAGEMENT

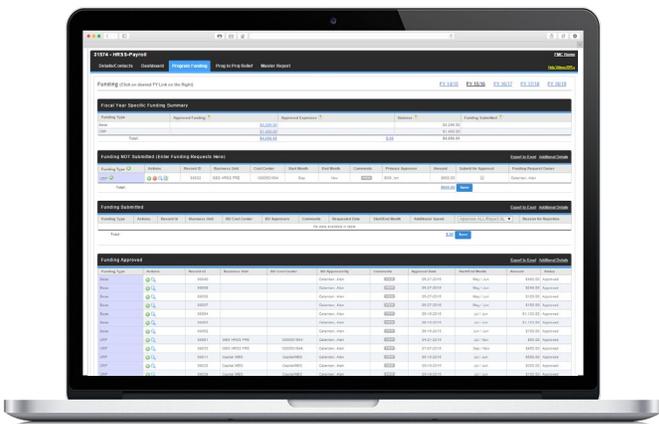
Budget and expense tracking using QuickBase and custom user-interface

CLIENT CHALLENGE

A multinational manufacturer of a wide range of products including common household items and prescription drugs utilizes a QuickBase application to track expenses at a granular level in an application they call FMC, or “Financial Management Center.” These expenses are tracked at three different levels including the Organization as a whole, categories, and then various services within the categories. The client was seeking a way to improve the application and give its end-users a way to transfer budgets between projects and/or services to provide relief when needed.

MCFTECH SOLUTION

MCF Technology Solutions (MCFTech) worked with the client to develop a custom user-interface (UI) to augment the existing QuickBase application. Small changes were also made to the QuickBase application to support the overlaid UI. The end-user is now able to access the UI and



submit funding requests for selected programs or assets. Once the request is submitted it is automatically queued up for an approver to review, and either approve or deny, based on the information provided.

In order to streamline the work of the approvers, MCFTech devised a method to avoid sending the approver an email notification every time a request was submitted. The approver is now sent a summary email at the end of the day which lists

all the budget and expense requests made throughout the day. The approver can easily approve or deny these requests directly from their email inbox. Alternatively, the approver can log-in to the QuickBase application throughout the day and see a notification of all pending requests for approval and approve or deny them on an ad-hoc basis. This application dashboard also provides valuable information to resources, including the ability to view historical data from previous fiscal

THE BENEFITS

Prior to the solution developed and implemented by MCFTech, the client was tracking expenses in two different systems. There was also no way to easily approve or deny expenses or expense transfers.

After the implementation of the solution, the client now has an automated approval process which allows end-users to submit requests, and appropriate resources are able to review and approve them almost instantly. End-users who submit requests can easily check on the status of their requests via QuickBase without having to personally contact the reviewer for an update.

In an effort to not inundate reviewers with mass quantities of emails, MCFTech developed a summary report email which collects all pending requests, and sends a summary report in one email for review. This has streamlined the reviewers workflow, uncluttered their email inboxes, and simplified the request communications.

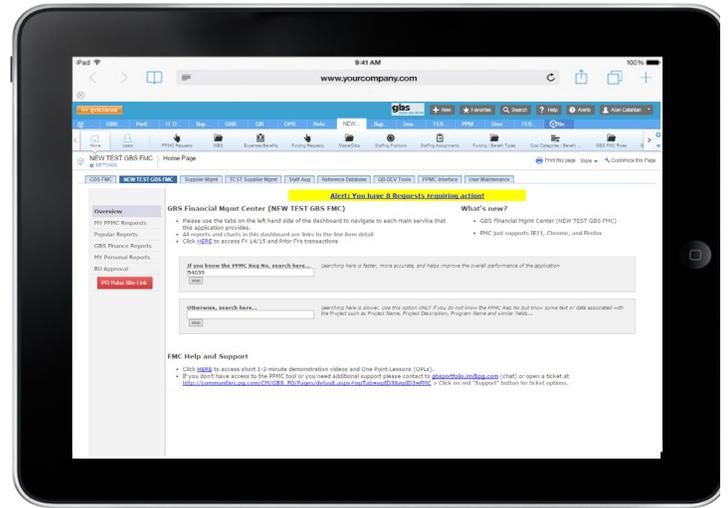


years, a quick search for previous requisition numbers or names, and an easy-to-use tabbed layout for other options.

Another key feature provided to the client was the ability to allow for budget and expense relief, or transferring extra or unallocated expenses to provide relief elsewhere in the organization. Budget relief could be provided in two ways:

- Program to Project
- Project to Service

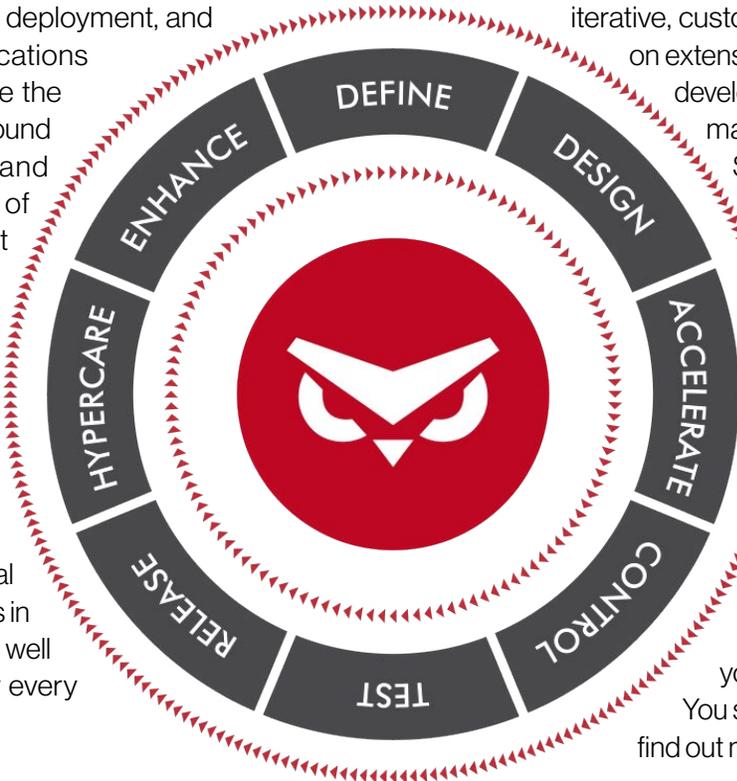
Utilizing the same UI, a user is able to log-in and select the program or project that the budget transfer will originate from. They are then able to select the project or service where the budget will transfer to. In an effort to keep a similar workflow for approvers, these requests are also provided in a once daily email summary report. The approver can take action and approve or deny the request directly from their email, or log-in throughout the day and approve or deny these requests on an ad-hoc basis.



In addition to utilizing QuickBase, the client also uses Hewlett Packard Project and Portfolio Management Software (PPMS) for storing certain data. A configuration between QuickBase and the Hewlett Packard PPMS system already existed. MCFTech was able to make certain configuration adjustments to capture additional data from the PPMS and pull it into QuickBase which automatically generated budget transfer records when certain conditions were met. This simplified the end-user experience.

ABOUT MCFTECH

MCF Technology Solutions delivers Services, Strategy, and Products to business customers worldwide. We focus on the successful development, deployment, and support of Business Applications for diverse teams. We believe the best solutions come from a sound business understanding and the thoughtful application of technology. Our Business-First approach ensures a high-level of collaboration with our clients and results that satisfy the organizational needs. As a modern, virtual company, MCFTech provides resources and services in the Americas, Europe, Africa, Asia, Australia, and the Middle East. Our global footprint includes deployments in more than twenty countries as well as systems that touch nearly every corner of the business world.



We utilize a proven methodology, dubbed the “The MCF Way,” which has led to hundreds of successful engagements. It is an iterative, customer-centered methodology based on extensive experience with leading software development, business process, and project management practices such as Lean, Six-Sigma, Agile, and PRINCE2®. This methodology allows our expert teams to deliver technical solutions to the world’s top companies. We bring the best value to help our clients achieve flexibility, collaboration, and intelligence in adapting to a changing global marketplace.

We believe that the best solutions are born out of a sound business understanding combined with the skilled application of technology. Why accept anything but exactly what you need from a software application? You shouldn't! Contact MCFTech today to find out more.

