
Los Angeles Unified School District



LAUSD ERP Project Vision Statements

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1. ERP VISION STATEMENT

Through the replacement of our aging financial, human resources, payroll and procurement systems, the District will:

1. Dramatically improve service delivery to schools
2. Radically improve the efficiency of District operations and our ability to manage them
3. Reduce/eliminate paperwork and redundant manual processes
4. Increase accountability and transparency to the public in the use of public funds
5. Provide better data for decision makers and stakeholders at all levels

2. GUIDING PRINCIPLES

As we engage in this change process, these guiding principles describe the basic attributes we are striving for in our new systems and processes:

Access – maximize access to data and transactions for all workers and decision makers while appropriately protecting sensitive employee data as provided for in law. Web-based tools provide the greatest access to information to all stakeholders in the various processes.

Usability – Our instructional leaders and school support workers should not have to have an MBA to effectively utilize their business, financial and human resources systems. Our systems should provide intuitive, user-friendly interfaces with robust on-line “help” functionality geared for the working professional, not the accountant.

Workflow - Paper is easily lost and takes time to move from one work unit to another. We should maximize the use of proactive “on-line” processing of all transactions to eliminate paper, yet provide for appropriate “on-line” approvals as required to comply with applicable laws and Board policies.

Robust and Flexible Reporting - Our ability to effectively manage at all levels of the District, relies on getting the appropriate data to the decision maker in a timely fashion. A decision maker might be a local school advisory council, a principal, a local district administrator, a procurement specialist, an accounting manager, the Superintendent, or a Board Member. Flexible reporting tools should allow for standard reports and ad hoc queries on all dimensions.

Best Practices - To achieve our goals we need to reexamine and redesign our existing processes in finance, human resources, payroll and procurement to meet the needs of schools in the 21st century. We must embrace the best practices embedded in off-the-shelf systems and change our processes rather than pursuing costly customization of software. Configure, don't customize!!

School Centric - The activities which take place at a school are the heart of our business. We must place all processes in the context of how they support the school operation and empower/enable excellent instruction to take place.

3. HUMAN RESOURCE VISION

Our human resources system will effectively support principals and other administrators in hiring and retaining a high quality workforce.

Administrators will proactively manage their staffing from vacancy forecasting, through employee selection, assignment and payroll utilizing web-based tools that eliminate long delays in the hiring process and provide schools and candidates alike with real time information on the status of their staffing choices.

Payroll will be transformed to a highly accountable, employee centered process characterized by accurate and timely pay for work performed.

Key attributes for our human resources systems include electronic workflow, a single database shared by all HR related functions, web-based access for all parties, robust role-based security, automated time capture, and self-service.

3.1 Hiring

For the hiring process, we envision a proactive, rapid process characterized by clarity and completeness of communication and engagement between the candidates, personnel, hiring authority and budget resulting in the best possible workforce for LAUSD.

Specifically we envision:

1. An interactive, online, real-time vacancy management capability that promotes early identification and seamless referral and fulfillment of budgeted positions.
2. A recruitment process supported by proactive resource projections and accurate/timely vacancy management capabilities.
3. An online application management capability to support District wide applications, automated qualification matching/filtering and electronic routing (workflow).
4. An integrated, flexible and extensive test management solution to facilitate the creation and administration (local and distributed) of employment tests, including the seamless transfer of applicable test result information to other processes (i.e. to determine rank order in fulfilling a position).
5. An automated method of determining priority rank order of candidates for a given position, based on definable business rules (list priorities, competencies, etc) and applicable employee/applicant characteristics.
6. The candidate/employee's information maintained and accessible, with appropriate security, in an electronic format, including the appropriate imaged documents (e.g. licenses, transcripts, references, verification of experience, etc).
7. A proactive, clearly communicated and actively monitored and measured qualification/eligibility clearance process that achieves results in a timely manner.
8. A automated tool to facilitate communication between process participants (i.e. candidate, personnel, hiring authority, etc) including the ability to identify employment opportunities, submit applications, obtain referred candidate information (application, resume/experience, etc), schedule interviews, provide interview feedback, indicate selection, online form completion, monitor/manage qualification process status, etc.

3.2 Assignment

For the assignment process, we envision one that seamlessly integrates with the hiring and payroll processes, clearly communicates roles and responsibilities, provides automated methods of realizing them, efficiently manages the timely creation, completion and maintenance of its activities and ultimately resulting in a positive contribution to the employees experience with the District.

Specifically we envision:

1. A means of proactively communicating the roles and responsibilities of process participants.
2. Distributed automated methods of notifying (e.g. regarding credential, contract, assignment, TB, attestation expirations/renewals, performance appraisals, etc), fulfilling and monitoring the progress of the assignment process.
3. A process that maximizes the use of parallel versus serial decision making.
4. Leveraging permission based access to a single source electronic employee file to improve the timeliness and accuracy of communicated information both internally and externally (e.g. clearance/confirmation of credentials, fingerprints, transcripts, etc) and facilitate more efficient business decisions.
5. Efficient and automated methods of monitoring, verifying and approving substitute placement, including the clear connection with position(s) being filled.
6. Efficient and automated methods of administering assignment changes based on applicable well-defined business rules, complex laws and regulations, and/or changes in characteristics of employee.
7. Having access to comprehensive employee assignment information covering the duration of their employment (current and historical audit trail).
8. Employee information that accurately depicts the actual duties being performed that is consistent with the position definition.
9. Extensive reporting capabilities to facilitate vacancy tracking, resource forecasting, historical trend analysis, substitute utilization, etc.

3.3 Payroll and Time Reporting

We envision a payroll process that pays every employee accurately and on time. It will require minimal use of District resources—staff, funds, equipment—and will provide timely, accurate remittance of all appropriate payroll-related funds. The processes will be flexible to accommodate changes in District needs or external constraints and requirements. Employees should have direct access to inquire, make changes, and solve problems from the usual work site. All payroll data should be visible online to the appropriate constituents, with proper industry-standard security and flexible user-controlled reporting. All processes will support full and transparent accountability, satisfying all regulatory and fiduciary responsibilities. Time reporting will be accurate, timely, and easy for employees to perform.

1. All types of deductions from gross pay will be accurately calculated automatically by the system, and appropriately deducted and remitted to the proper entity. These deductions include all taxes, employee garnishments, retirement fund contributions, union dues, credit union payments, and annuities.
2. The system will accommodate changes to the internal and external operating environment without requiring custom programming. Such changes may include staffing reorganization, bargaining agreement modifications, regulatory changes, new education delivery models, and new delivery methods for pay and remittances.
3. Employees will be able to easily view all details about their pay, including full history of all prior pay cycles. They will be able to maintain their own records to the degree permitted by law, including W-4 information, voluntary deductions, and demographic fields. Managers will have direct access to reports, statistics, and forecasting tools, all based on real-time data.
4. All audit, regulatory, reporting and fiduciary requirements will be provided directly by the system, without requiring additional data cleansing or manipulation. (No one will have to build spreadsheets to meet any such reporting requirement.)
5. The time reporting mechanism will provide flexibility to employees, so that work time is not affected by reporting requirements. Employees will not be required to know the details of the “back end” to pay processing, such as the funding sources or budget lines. In appropriate cases, employees will be able to report only exceptions to a normal pay period.
6. The focus of the payroll department will change from processing transactions and correcting errors to providing service to employees, monitoring the pay process, providing analysis and reporting as required, and performing continuing research and development. This will enable the District to proactively meet changing requirements.

3.4 Position Management

We envision Position Management as an integrated, workflow-based process that includes the creation and maintenance of budgeted positions, comprehensive human resource planning, matching resources with budgeted positions, and vacancy management. All District parties will have easy online access to the information needed to fulfill their missions. The District will be able to provide accurate reporting for regulatory requirements while maintaining compliance with all agencies, credential bodies, and oversight entities directly from the system, and without requiring additional data cleansing or manipulation. The system will provide flexibility in tracking, analyzing, and reporting on vacancies and on the steps in the hiring process. It will support matching candidates' credentials with course requirements and position descriptions. The system will track all attributes related to seniority for purposes of displacement, promotion, and layoffs.

1. Enable the District to effectively control expenditures through the allocation and monitoring of budgeted positions.
2. All District parties will have easy access to the information needed to fulfill their missions. This includes Budget Services, Human Resources, the hiring authority, all locations, and the individual employee.
3. Managers will have easy online access to accurate real-time staffing information. All constituents will have access to, and will use, the same *accurate* information regarding employees, assignments, and positions. They will be able to plan employee resource allocation and implement the plan.
4. The District will be able to provide accurate reporting for regulatory requirements, and maintain compliance with all agencies, credential bodies, and oversight entities, without requiring additional data cleansing or manipulation. (No one will have to build spreadsheets to meet any such reporting requirement.)
5. All information will be transparent and available to the public, within the constraints of proper security, privacy and regulatory requirements.
6. The system will provide flexibility in tracking, analyzing, and reporting on vacancies and on the steps in the hiring process. It will accommodate multiple definitions for "vacancy" and clearly indicate the status for each use of vacancy. It will provide proactive monitoring of vacancies, both real-time and projected. Projections will be based both on information received and on calculated projections. Users will have scenario-based planning and forecasting tools; results from these tools will be transferable to establish hiring requirements.
7. Managers will be able to record information regarding their staffing plans, which will facilitate and support overall District planning.
8. The system will support workforce planning related to retirement patterns and general population demographics.
9. The system will support many-to-many links among employees, assignments, positions, and budget lines. Funding will flow seamlessly through payroll to the general ledger, with the ability at each step to make adjustments.
10. Changes to funding source/loss of funding source: the system will provide advance notice to affected parties of pending changes to funding sources for positions. Such changes will trigger workflow including all the necessary steps to make the required

adjustments. It will include the ability to track elements of the State budget, including notations regarding funding end dates and provisional ending dates.

11. The system will track all attributes related to seniority for purposes of displacement, promotion, and layoffs. Managers and HR staff will be able to develop “what if” scenarios and to see the results of complex personnel actions before implementing them.
12. Payroll and position management both use a single personnel database, ensuring that only accurate, authorized pay is distributed. No one is paid unless associated with a valid, funded position.
13. The system will support and facilitate principals’ ability to check and match candidates’ credentials with course requirements, as early as during the employee requisition process.

3.5 Leave Management

For Absence Management / Workers' Compensation, we envision an integrated solution that facilitates the understanding of what types of absences are available to employees, the leave application process, and leave case management. We envision the solution to be a systematic way of managing, analyzing, and reducing or minimizing the causes of absences within the District's work force to positively impact both the direct and indirect expenses caused by absences while ultimately enhancing personnel productivity. Specifically we envision:

1. A solution that encompasses, early care identification and intervention, as well as integrated disability and integrated absence management.
2. Electronic data capture, on-line case tracking and self service, web-enabled availability, and integrated on-line electronic workflow with automatic approval and denial notification of leaves approved or denied for employees and supervisors.
3. A common intake center (call, web, IVR, etc.), 24/7 and a single point of contact for all leave tracking, including a three-point contact in first 24 hours for assignment and triage that includes Case Management Services with proper case load balancing by case examiner.
4. Tracking, notification, and communications via multiple media notification to employees, and managers/supervisors regarding absences.
5. Storing and tracking absence information on all employee absences via integrated real-time software and databases between HR/Payroll, Finance, Risk Management, and Benefits information systems.
6. Accurately tracking benefit information, lost work time (down to the quarter-hour), associated costs, savings, and facilitating reductions in lost work days and reductions in administrative costs via knowledge-driven data and benchmarking.
7. Reducing short- and long-term disability and Workers' Compensation expenses and premiums through efficient, automated administration.
8. Early notification, intervention, and case management (clinical) from the first day of absence that facilitates consistent and close (integrated) communication with employees, health providers and administrators for the duration of an employee's absence.
9. Technology that incorporates current Federal, State, and Local legislation, collective bargaining agreement, and board policy requirements and allows for compliance with FMLA, ADA, CFRA, PFL, etc. with concurrent and intermittent tracking and coordination of leaves. The technology would be flexible enough to allow for changes in any or all applicable areas to be implemented.
10. A solution that facilitates return to work via measurement and evaluation of assignment of work duties and monitoring of work restrictions and encompasses automated letters, reminders, re-certifications, etc. allowing workforce planning for managers and key users.
11. Proactive and easy to use web-enabled management reporting, reporting analytics, modeling, etc.

3.6 Benefits

For the benefits process, we envision one that is proactive, that clearly communicates the variety of benefit options (e.g. health, vacation, illness, formal leaves, family leave, voluntary programs, retirement saving plans, etc) to its participants, that provides user friendly methods for participants to monitor and maintain their benefit selections, has extensive and flexible reporting capabilities and provides District management with appropriate tools to efficiently monitor their associated costs.

Specifically we envision:

1. Easy access to accurate, electronically distributed benefit option information.
2. Utilizing multiple methods to ensure the delivery of the most appropriate customer service (i.e. call center, web based, walk in, etc), including the ability to access instructional information, online form completion and determine status.
3. Participants are able to request, maintain and status benefit selections in an automated, real-time manner, including system verification capabilities based on definable rules and actionable methods of resolution.
4. Automated routing and monitoring of benefit requests and online approval capabilities to ensure timely completion (i.e. as part of clearance process, during enrollment, to meet other deadlines, etc).
5. New or updated options are easily implemented and existing options easily maintained.
6. The information regarding the current status of a participants benefit options (e.g. selections, balances, etc) is immediately available to other business processes to facilitate adherence to defined business rules/policies (e.g. edits on time capture to validate available balances for sick and vacation).
7. A robust reporting tool providing timely, accurate and flexible reporting of balances and selected options.

4. FINANCE VISION

Our financial systems enable us to be accountable to the public for the manner in which we spend public funds. As such, they must be accurate, timely and provide meaningful information in formats that enhance understanding.

They must enable us to manage our resources, not just report on them.

We envision a system that will efficiently support local budget, resource allocation and expenditure decisions, on-line approvals of budget and expenditure decisions as applicable, and robust workflow tools to enable such approval processes to be proactively managed.

The system must reflect the actual cost of operations down to each school and operating unit, for decision makers at all levels, on a real-time basis.

4.1 General Ledger

For General Ledger, we envision a process that provides real-time, accurate, dependable, and useful information capture and reporting to those individuals who need the information to support their respective data-driven decisions. We also envision that the G/L will quickly, efficiently, and effectively accommodate changes in accounting practices, business practices, policy shifts and governmental regulations.

Specifically we envision:

1. A hierarchical chart of accounts that allows for coding flexibility, with the ability to define coding relationships and coding combinations (user-defined coding structures). A system that allows for ease of entry or modification of valid or invalid account code structures and tracks transaction activity by source.
2. A chart-of accounts with flexible drill-down and roll-up capabilities.
3. A system that validates GL codes and balances at the time of entry for the AP, Procurement, Payroll, Cost Accounting, Fixed Assets, and Grant Management transactions.
4. A system that accommodates fiscal independence (Charter Schools).
5. Support of multiple G/L's to avoid having Los Angeles Educational Foundation money mingled with the District money.
6. Electronic workflow to reduce paperwork and manual record keeping and increase accuracy.
7. A system of self-service that accommodates a variety of workflow rules (multiple level approvals, etc.) allowing work to commence at the lowest level where users can enter transactions directly without paper for electronic review, and posting. Users are allowed to enter transfers, budget adjustment requests, JV's, etc. and the system verifies transaction information at the system level at the time of coding and not after the fact.
8. A system with appropriate interface / download capability with both the County of Los Angeles and the State of California for review and compliance (SACS).
9. Audit trails that provide sufficient information to track the flow of transactions from source document to printed final report and from final summaries back to the original source document.

10. On-line query capabilities at the school level with appropriate security access that limits a school from accessing another school's information.
11. Remove manual checking effort of account coding strings with State criteria.
12. The timely close of the books each month and at year-end.
13. Appropriate reporting at various levels, including ad-hoc reporting capabilities, appropriate tax reporting, student health services reporting, etc.
14. The auto populating and detailed inventory capture of fixed assets or inventory items (capital assets, equipment, etc.) upon item receipt to help drive compliance and reporting on the use of Federal Grant dollars, items into the ledger(s), depreciation, etc.

4.2 Budget

For the budgetary process, we envision one that positively contributes to achieving the District's educational and operational objectives, characterized by comprehensive, timely, easily maintainable, accessible and understandable information to support sensible, knowledgeable and fiscally responsible decision making.

Specifically we envision:

1. A system with seamless budget development and budget maintenance capabilities (i.e. fully integrated within itself and other applicable modules (HR, Payroll, General Ledger, etc)) and the flexibility to conform to changes in legislation, processes, resource allocations, technology improvements, etc.
2. Simple, workflow driven methods of developing, implementing and maintaining budget information (dollars and supporting narratives) wrapped in automated controls and permission based security to appropriately enforce fiscal responsibility and accountability.
3. Distributed access to accurate, online educational information including clear instructions/guidelines on usage of funds and mechanics on developing and maintaining budget information.
4. A process that empowers and supports the efforts of District management staff (i.e. principals, local district management, central office management, etc) to achieve a greater level of responsibility, accountability and flexibility in developing and managing their budgets.
5. Comprehensive, accessible and reportable audit trail information to substantiate the activities of the entire budget cycle (i.e. forecast to preliminary to provisional to final to maintained final), including supporting narratives.
6. Extensive and flexible reporting capabilities reflecting real time budget to actual information.
7. A process that seamlessly fulfills the various external budget reporting requirements (e.g. creating the Budget Book) and provides for multiple methods of distribution.
8. A flexible system that can conform to changes in legislation or policies.
9. A process that affords participants the opportunity and time to engage it in a more analytical versus transactional manner.

4.3 Asset Management

For Asset Management, we envision a real-time District-wide view and tracking of all assets at various levels and locations, including capital assets, information technology assets, equipment and furniture, vehicles, etc. We also envision accessibility of asset information at the location level, the capability of tracking asset receipt, inventory stocking, asset tagging / labeling / identification, deployment, and life-cycle management for total cost of ownership by location via the use of asset management, procurement, and accounting (financial applications) technology.

Specifically we envision:

1. A system that allows for both centralized and decentralized purchasing of both consumable and non-consumable assets with the appropriate procedures that dictate and define what asset purchasing is centralized vs. decentralized.
2. A system that allows for the tracking of assets by location, particularly schools, with the ability to report annual asset inventories (Form 9) in an automated fashion with appropriate audit tracking / audit trail information utilizing the web to capture and / or print out of asset inventories for updating by location.
3. An on-line, real-time asset requisition process that reduces or eliminates paper, increases accuracy and accommodates workflow processes from initial asset ordering, receipt, review, approval, deployment, A/R, and efficient and effective asset disposal.
4. A system that allows for determining the effective costs of an asset over its lifetime, including an appropriate valuation, depreciation, etc., with appropriate replacement schedules for all assets.
5. Inventory management and control of supplies and equipment in the warehouse.
6. Forecasting capabilities for replenishment.
7. Tracking inventory / assets against potential revenue stream requirements (grants, bonds, COP's, gifts, etc.)
8. Categories of asset inventory including: deployed assets that are on the books of the location, un-deployed assets at a warehouse that need to be deployed, parts for servicing the assets, and tools to perform the services.
9. Having vendors tie into District ERP solution for delivery, reporting, invoicing, etc.
10. Licensing the seats for Software compliance – inventory being kept for software compliance (i.e., concurrent / named / floating seats, etc.)
11. Tracking assets assigned to specific individuals (teachers, directors, admin assistant, etc.)
12. Proactive exit interview process that collects assets from the employee during an employee's exit interview. (i.e, integration with the HR system)
13. Integration with the Procurement system.

4.4 Supply Chain Management

The procurement of goods and services shall be simple and user-friendly with clearly communicated business rules, procurement policies and internal controls that are mapped into the workflow and transparent to the user. We envision a process that connects all purchasing functions, including vendor sourcing, purchase order management, receiving, and payables to optimize productivity with workflow-enabled automation and self-service capabilities.

Specifically, we envision:

1. A one-stop shopping place for schools and offices to procure all goods and services, independent of who provides it (e.g. District warehouse, contractors or outside vendors).
2. Vendor self-service registration and maintenance capabilities, including the submission of qualifying information and invoice status tracking.
3. The ability to exchange data electronically with vendors eliminating errors and delays that come from re-keying invoices, receivers, etc.
4. The ability to support online bidding and online catalogs from suppliers to obtain the best value, not just the lowest price.
5. Online tracking of the procurement status from cradle to grave.
6. User definable automated payment control and scheduling with electronic capabilities to maximize vendor discounts and well-timed use of District funds.
7. Effective monitoring and proactive managing of contracts with alerts, escalation, and workload management capabilities.
8. Benchmarking and key metrics for vendor performance, cost performance, contract performance as well as internal performance.
9. Data aggregation and reporting ability to support and enable continuous improvement of procurement-to-payables functions.
10. Audit trails which provide sufficient information to track the flow of transactions from source document to final report, and from final summaries back to the original source document.
11. Seamless integration with
 - a. Inventory and asset management
 - b. Other procurement tools – P-card, T-card, and Book card, etc.
 - c. District's document management application for contracts, amendments, bids, etc.
12. A process that allows for responsive customer service and efficiency for reduced cost per purchase order through strategic sourcing and pricing.

4.5 Cost Accounting

Cost Accounting envisions a solution that provides a real-time or near real-time fully integrated environment that captures detailed costs and charges by transaction, activity, process, job, project, or grant. We envision costs being captured, managed, and reported by section, expense budget line (i.e. buyer / seller); where budgets are established, transactions are incurred, reviewed, and authorized by the appropriate parties at the appropriate locations allowing management at various levels and locations to control and forecast costs.

Specifically we envision:

1. A flexible data capture environment that captures costs from initial time reporting transactions to procurement transactions, etc. at the lowest level possible.
2. Automated workflow for job, project, grant, cost capture, review, approval, and denial.
3. Allowances for adjustments to “rates” during the year to accurately track costs.
4. Automated calculations for overhead rates.
5. The need for encumbrances and reconciliation on an annual basis with automatic rollover of the encumbrances to the following year.
6. Automatic encumbrance cancellation for completed jobs with encumbrance balances.
7. Making certain that associated funding lines are identified and when that particular funding runs out.
8. An early warning system (notification) if items, costs, or time are extended such that it affects the funding lines and accounting responsibilities to those funding lines.
9. A simple time-reporting, grant transaction, and cost transaction capture environment
10. The capability to rollover unspent costs and reconcile to the budget.
11. The capability to slice and dice costing data by a variety of means for statistical analysis and review, including compliance reporting.
12. A system that quickly and proactively informs key users about who is charging what account, activity, process, job, project, grant, etc.
13. Management reports by activity, process, job, project, grant, etc
14. Electronic reporting utilizing web and workflow technologies.
15. Cost tables from inception to date as well as by fiscal year.

5. TECHNICAL VISION

We envision a technical environment that is always available, secure, highly responsive, flexible in configuration, easy to maintain, enhance, and upgrade, and, above all, one that provides the information and analysis tools to support the LAUSD staff in fulfilling the mission and goals of the District.

Specifically we envision:

1. Enhanced roles for ITD staff in support of the ERP system, including
 - a. Partnered transition along with user base
 - b. Closer partnership with business users
 - c. Move toward more analysis, higher-order work
 - d. Training will be scheduled and funded
 - e. More and higher-order user support
 - f. Maintain the sophisticated underlying environment that enables end-user power and flexibility
2. A single operating system environment.
3. A single set of integrated, industry standard software development and maintenance tools, with a large base of trained practitioners.
4. Smooth, frequently validated failover mechanisms.
5. A backup time window that fits within the District's operating parameters.
6. A multi-tier application architecture, including thin-client, GUI, web-based front ends.
7. A robust, flexible, widely supported, well-documented application integration approach, including a rich API architecture.
8. A smoothly scalable system, able to handle widely varying numbers of users with minimal intervention, and with a small footprint for its nightly cycle.
9. Robust, role-based security; single sign-on support.
10. A clear, published upgrade and maintenance path.
11. Rich and well-documented configuration options, both for initial installation and for ongoing maintenance; sufficient default values to enable rapid deployment.
12. Access to the product's metadata, including API tools and complete documentation.
13. A complete test environment (development, QA, and production instances), including adequate infrastructure, staff (DBA), storage and network capacity, a full volume of test data.
14. Customizable on-line help that is persistent across product upgrades, context sensitive, and based on a standard platform.
15. Built-in reporting capabilities using a delivered data mart or data warehouse, with support for populating external data warehouses.