ACTUATE

York University Extends Value
of PeopleSoft Application with Actuate

"Actuate was the only technology that could meet all of our requirements to help us achieve our vision of an integrated, secure, report distribution system. By leveraging the Actuate technology, we will be able to reduce our report life cycle while delivering a content-rich, web-reporting infrastructure to the University community from our PeopleSoft Finance, Human Resources and Advancement systems."

— Luana Jursza, Director of Information Technology Services

YORK U
UNIVERSITÉ UNIVERSITY
redefine THE POSSIBLE.

> **BUSINESS PROFILE**
> *York University is a provider of higher education in Canada*

> **INDUSTRY**
> *Education*

> **BUSINESS**
> *Higher Education*

> **APPLICATION**
> *Secure Report Distribution System*

> **# OF DEPARTMENTS**
> *3*

> **# OF USERS**
> *300 initially, 5,000-plus eventually*

> **TYPES OF USERS**
> *Executives, Managers, Analysts*

> **LOCATION**
> *Toronto, ONT Canada*

> **WEB SITE**
> *http://www.yorku.ca/*

Company

The mission of York University is the pursuit, preservation and dissemination of knowledge. York promises excellence in research and teaching in pure, applied and professional fields.

The York University Challenge

York University selected PeopleSoft in 1996 as the standard for financial management, human resources, benefits, payroll and alumni and donation systems.

However, York found that their current PeopleSoft application didn't meet their reporting requirements.

The report life cycle just for the financial suite of management reports took seven days. Executives, managers and analysts from Finance, Human Resources and Advancement had to rely on their ITS department to create and deliver management reports.

The delivery mechanism of reports was inadequate. Reports were delivered in both hard copy and downloadable static Adobe PDF files, where users were forced to re-key data into an electronic format. In addition, some ad hoc reports were delivered in Excel but were manually created and delivered via email.

The process was not automated and reports were handled as an "on-request" basis. The report security was not flexible and did not enable York to meet their security requirements.

York University needed a solution that would enable them to reduce the report life cycle while delivering a content-rich, web-reporting infrastructure to the university community from their PeopleSoft finance, human resources and alumni systems.

The Actuate Solution

By leveraging the Actuate solution, York University was able to develop a Secure Report Distribution System that integrated easily with their current PeopleSoft technology.

With Actuate, critical business reports such as operating statements for financial and staff resources are now delivered in a timely, secure manner via the web. Reports are easy to use, have a consistent format and are downloadable.

Plus, the Actuate e.Spreadsheet server will deliver reports in a native Microsoft Excel format to end users without any exporting or formatting issues. York University uses Actuate's e.Spreadsheet capabilities to ensure that end users get Excel spreadsheets complete with formulas when extracting data from an e.Report. As a result, this will provide end users greater analysis capabilities as formulas are retained within the delivered reports. They will now be able to sort, sift and filter through data.

Implementation

Inforica, the Canadian Actuate Reseller, implemented the Actuate Server for York University's PeopleSoft financials, HRMS and alumni applications. Inforica was chosen because of their ability to meet York University's unique requirements, plus their expertise in PeopleSoft consulting.

The first step for Inforica was to set up a reporting task force made up of both Inforica and York personnel involved in preplanning and implementation. Training sessions for all of York's reporting staff, starting with the developers, were held at Inforica offices.

York's developers worked closely with Inforica's consultants in order to achieve the highest level of knowledge transfer. Report previews met user approval. The reports are easy to use, have a consistent format, are downloadable and secure.

Benefits of Actuate

By leveraging the Actuate e.Reporting and e.Spreadsheet Server, York University will be able to:

Increase Operational Efficiency

The manual process of creating reports and re-keying data will be eliminated. Since reports will be automatically generated in familiar formats such as PDF or Excel, end users will now have more time for analysis. In addition, access times to information will be shortened, leading to increased productivity.

Decrease Costs

The Actuate solution will cut York University's hard copy printout costs dramatically, decrease production times and overhead costs by $600K annually.

Lower Total Cost of Ownership

Total cost of ownership is $180K annually, over three years.

As a result, York University will save $420,000 in costs annually.

Make Better Business Decisions

Most importantly, the Actuate information delivery solution will facilitate the delivery of critical business information in a timely, familiar format that end users can work with and make better business decisions that will have a positive enterprise-wide effect.

About Actuate

Actuate Corporation is dedicated to increasing the richness, interactivity and effectiveness of enterprise data, for everyone, everywhere. Actuate delivers the next generation RIA-ready information platform for both customer and employee-facing applications. The Actuate platform boasts unmatched scalability, high-performance, reliability and security. Its proven RIA capabilities and highly collaborative development architecture are backed by the world's largest open source information application developer community, grounded in BIRT, the Eclipse Foundation's only top level Business Intelligence and reporting project.

Global 9000 organizations use Actuate to roll out RIA-enabled customer loyalty and Performance Management applications that improve customer satisfaction and employee productivity. The company has over 4,200 customers globally in a diverse range of business areas including financial services and the public sector, many of which have a long history of deploying Actuate-based solutions for dozens, or even hundreds of their mission-critical applications. Founded in 1993, Actuate has headquarters in San Mateo, California, with offices worldwide. Actuate is listed on NASDAQ under the symbol ACTU. For more information on Actuate, visit the company's web site at www.actuate.com.

Actuate Corporation
2207 Bridgepointe Parkway
Suite 500
San Mateo, CA 94404

Tel: (888) 422-8828
Web: http://www.actuate.com

3