



Customer Snapshot

Westbank First Nation improves financial reporting speed, quality with Infor F9



Facts at a glance

Product: Infor F9

Industry: Government

Country: Canada

“The biggest benefit has been the improved quality of the reports. The reports are quicker to generate and Infor F9’s audit check functionality ensures accuracy before we send them out.”

—Eric Fleury, budget and financial reporting administrator, Westbank First Nation

About the organisation

Westbank First Nation (WFN) is a leader in aboriginal self-government, providing progressive economic, cultural, and social services for its members, residents, and businesses. As one of seven bands that make up the Okanagan Nation, WFN is located in the South Central Interior of British Columbia, just minutes from Kelowna. With a history rich in culture and tradition, as well as a population of approximately 800 members and between 9,000 and 10,000 residents, WFN places high value on the responsible management and protection of its resources, environment, and watersheds. To learn more, visit www.wfn.ca.

Challenges

- Upgrade an inflexible financial reporting engine with its legacy software package.
- Use a financial reporting system that did not always meet the needs of its organization.
- Find a system that would support building reports easily on-the-fly, customizing reports quickly, or distributing them to department managers efficiently.
- Take advantage of existing knowledge of Microsoft® Excel®.
- Work with a financial reporting system that was not user-friendly and frustrated staff.

Benefits

- Improved the quality of financial reports using the flexibility of Infor® F9 and the tools available in Microsoft Excel.
- Acquired a system that could build customized reports quickly from real-time ERP data.
- Met organizational requirements for financial reporting and exceeded managers’ expectations with reports that are easier to understand, more informative, and consistently accurate because of Infor F9’s automated audit checks.
- Enabled easy-to-use features such as conditional formatting, data/pivot tables, and formal auditing.
- Increased both staff and management satisfaction with a responsive, user-friendly solution that is easy to learn.

“Managers are noticing things in their Infor F9–produced reports that they would not have previously because the reports have been customized to suit their specific needs.”

—Eric Fleury, budget and financial reporting administrator, Westbank First Nation

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