

CASE STUDY + RECONCILIATION BLUEPRINT

Reconciling multiple ERPs into one operating view.

How an infrastructure products group created one trusted cross-division view while every local ERP remained authoritative.



CLIENT

Infrastructure products group

OPERATION

Cross-division operating review

SYSTEMS

Divisional ERPs and reporting sources

DECISION OWNERS

Division leaders and data governance

THE OPERATING CONSTRAINT

Every cross-division question restarted the reconciliation.

One of our clients is a multi-division infrastructure products group. Each business runs its day-to-day operation in a separate ERP. Those systems correctly reflect local products, units, customers, inventory, orders, and financial records.

Group leaders still needed one view across the portfolio. Every review required exports, mapping tables, spreadsheet adjustments, and conversations with division experts. The report could be consolidated, but its business meaning and lineage were hard to inspect.

ONE RECURRING CONFLICT

The same product family appeared with different units and inventory definitions.

The group needed a comparable inventory value. The records could not be merged blindly because each division used valid local stocking logic.

THE OPERATING SHIFT

BEFORE

Analysts rebuilt shared meaning before every group review.

ERP data exported

Mappings rebuilt

Definitions checked

Questions returned to divisions



AFTER

One governed layer reconciles the values and keeps every ERP in control.

Source records retained

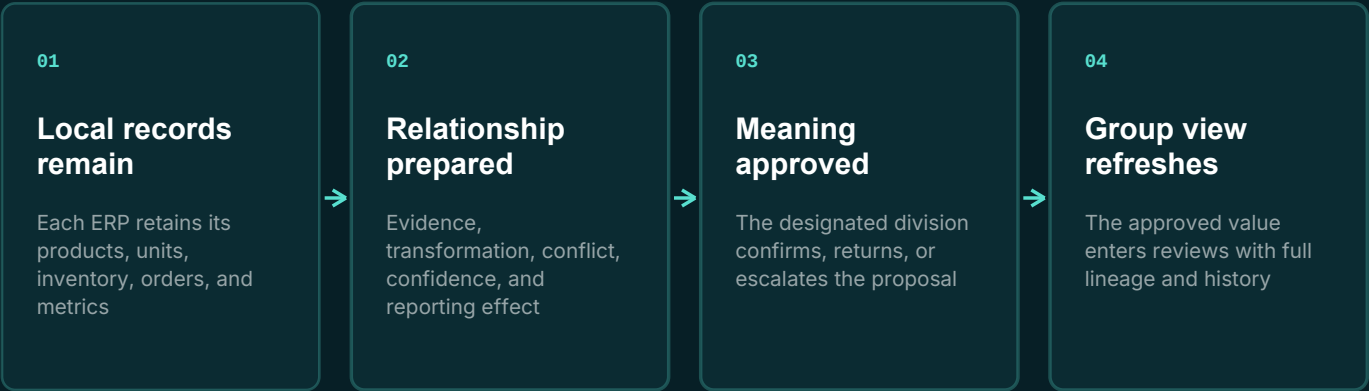
Mappings prepared

Owners confirm meaning

Group view refreshes with lineage

THE GOVERNED OPERATING BLUEPRINT

Each shared value keeps its source, definition, owner, and approval.

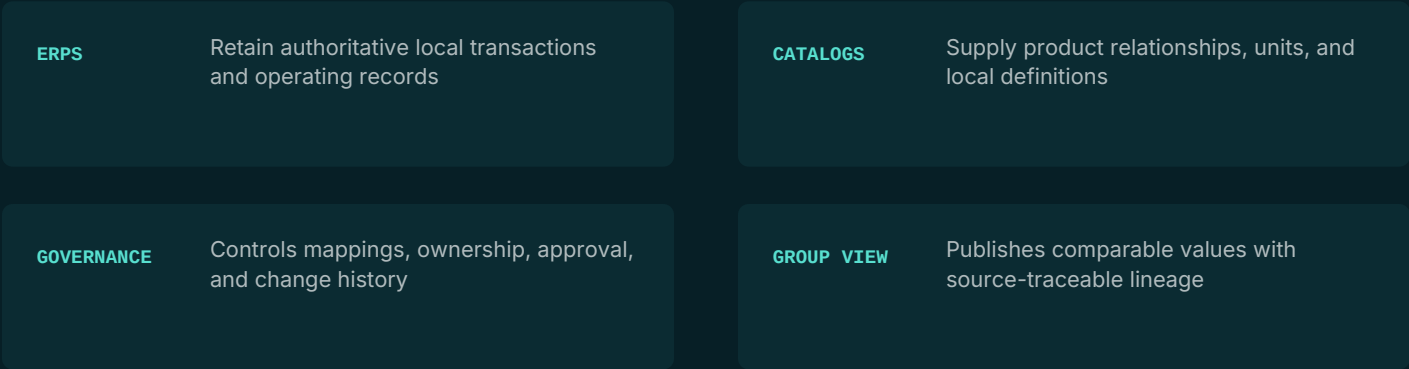


HUMAN AUTHORITY

Carric prepares the mapping. Divisional owners approve shared meaning.

Data governance controls mapping and lineage. The source records remain unchanged.

SYSTEM ROLES



The data steward sees which conflicts could change the next group review.

The queue shows the affected record, consequence, owner, due date, evidence state, and current decision stage.

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CURRENT SCOPE

Four divisions · ERP reconciliation, metrics, lineage, and operating action

Search case, asset, task, role...

LO Liam Ortiz
Data Steward

OPERATING SYSTEM

Harbor Infrastructure Products Group

Data Steward

MY WORK

Operating Intelligence

WORK AND DECISIONS

Cases

Evidence

Activity

Performance

Role-shaped access
Authoritative systems remain in control

Applications / Operating Intelligence

My queue

Overview

Decision review

Evidence

Activity

Performance

8 RECORDS NEED ATTENTION

SAVED VIEW

Reconciliation and metric queue

STATUS

Open work

PRIORITY

All priorities

VISIBLE CASES

4

Reconciliation and metric queue

Sorted by reporting consequence and unresolved business meaning

4 CASES

CASE	PRIORITY	PROCESS	OWNER	DUE	STATE
☒ Product P-440 · Unit and inventory conflict REC-#268	HIGH	Business-meaning review	Avery Stone	Aug 28	REVIEW
☐ Customer group · Duplicate identity REC-#262	HIGH	Entity confirmation	Liam Ortiz	Aug 28	WAITING FOR EVIDENCE
☐ Backlog status · Division West REC-#257	MEDIUM	Metric definition	Maya Chen	Aug 30	EVIDENCE READY
☐ Inventory reserve · Division East REC-#251	MEDIUM	Transformation review	Jordan Lee	Sep 02	IN PROGRESS

Selected case

HIGH

REC-#268 · OPERATING INTELLIGENCE

Product P-440 · Unit and inventory conflict

Two divisions represent a related product with different units and stocking logic. The proposed group mapping requires divisional confirmation.

CURRENT OWNER

Avery Stone · Divisional Operations Director

PROCESS

Business-meaning review

DUE

Operating review · Aug 28

CURRENT STATE

REVIEW

Open governed case →

01

One governed queue

Entity, unit, inventory, order, and metric conflicts enter one visible operating backlog.

02

Reporting consequence is visible

Owners can see which unresolved records affect the next group operating review.

03

Authority is assigned

Each conflict carries a steward, business owner, due date, and current evidence state.

The divisional owner approves shared meaning from both source records.

The case preserves local values, the proposed relationship, approval criteria, downstream effect, and full lineage.

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8 RECORDS NEED ATTENTION

REC-0268 · GOVERNED CASE

REVIEW

PREPARED CONFIDENCE

77%

OWNER

Avery Stone · Divisional Operations Director

PROCESS

Business-meaning review

DECISION WINDOW

Operating review · Aug 28

SYSTEM

Divisional Operating Intelligence

Evidence

SOURCE AUTHORITY RETAINED

Division ERP A

Product P-440 - each

CURRENT

Division ERP B

Product 440-B - linear foot

CURRENT

Product catalog

Related application and form

MATCHED

Inventory logic

Stocking conversion

CONFLICT

Decision preparation

HUMAN AUTHORITY REQUIRED

CRITERIA

✓ Group data standard v4.0

✓ Unit-conversion authority

✓ Divisional source ownership

✓ Metric publication control

PREPARED OPERATING RECOMMENDATION

Keep both source products distinct. Approve the governed reporting relationship and publish the conversion only for the defined group measure.

Approve group reporting relationship

The division confirms business meaning. Data Governance controls mapping and publication. Source records remain unchanged.

Open decision →

CASE TRACE · CURRENT AND CONFIRMED STATES

Source profiling

Candidate relationship

Conflict review

Division approval

Metric publication

Group confirmation

Role-shaped access

Authoritative systems remain in control

01

Both local truths remain

Each ERP record stays visible with its own unit, inventory logic, and source status.

02

The proposal is bounded

The system prepares one group reporting relationship and shows where it will apply.

03

Human authority is preserved

The designated division confirms business meaning before the group value is published.

WHAT CHANGED OPERATIONALLY

Group reviews now start from reconciled evidence.

Leaders get one consistent view while local teams keep control of the systems that run their operations.

01

One trusted operating view

Products, units, inventory, orders, customers, and measures become comparable across divisions.

02

Local systems stay authoritative

Each ERP continues to own transactions and locally meaningful operating records.

03

Every value keeps its lineage

The group view carries the source, transformation, definition, owner, and approval state.

APPLY THE PATTERN TO YOUR OPERATION

Which operating review still requires a separate reconciliation before leaders trust the picture?

01 Which cross-division value matters?

02 Which systems hold the source records?

03 Who owns the shared business meaning?

04 How will the refreshed value be confirmed?

Bring one measure, the ERP records behind it, and the decisions it supports.

Talk to Carric ->