

**Interactive Reporting: Delivering
Answers rather Numbers
(An Enhanced JDE User Experience)**

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Quick Facts:

- 500+ customers
- 50,000 users in 45 countries
- Solid network of experienced partners covering every continent
- Received 2008 Gartner "Cool Vendor" Award



- We are **committed** to giving you the ERP data you need to run your business right.
- We **solve** core JD Edwards and Oracle E-Business Suite issues that get in the way of you doing your job:



Inquiry



Reporting



Reconciliation



Budgeting



Analytics



Data Integrity Management

- We **simplify** complex problems:
 - **Direct Access** – No staging or duplication of data
 - **True End-User Tools** – Not technical tools masquerading as end-user solutions
 - **Fast and Easy to Use** – Great performance with minimal training required
 - **Immediate Time-to-Benefit** – No lengthy implementation
 - **Simplify Business** – Software that simplifies processes, not making them more complex

The definitive set of productivity tools for JD Edwards and Oracle E-Business Suite.

Insight™ Benefits

- Built for business/end users
- Quick install
- Real time information
- Built in “ERP Smarts”
- Exceptional performance
- Inherits ERP security
- Improves efficiency
- No additional IT infrastructure
- 100s of prebuilt SmartViews™
- Immediate value and results



The *Insight Gallery™* showcases 100s of SmartViews™ that provide instant value.
We've built it so you don't have to.

At a Glance

- Pre-built, plug & play views for **Insight Reporting™**, **Insight Budgeting™** and **Insight Console™**
- Designed specifically for the ERP system
- Dynamic & configurable
- Include business logic
- Choose the right SmartSets™ for each user
- Gallery of 100s of SmartSets™ including:
 - Area
 - Suites
 - Solutions
 - And more

Solution SmartSets™

- Capital Asset Mgt
- Design to Make
- Employee Lifecycle
- Lean Accounting
- Month End
- Order to Cash
- Order to Ship
- Procure to Pay
- Supplier Management

Area SmartSets™

- General Ledger
- Accounts Payable
- Accounts Receivable
- Fixed Assets
- Job Cost
- Inventory
- Sales Order Processing
- Purchase Order Processing
- Capital Asset Management
- Tax Reporting
- Manufacturing
- Mfg Resource Planning
- Contract Service Billing
- Human Resources
- Payroll
- Customer Relationship Mgt
- Timesheet Reporting
- Property Management
- Service Management
- Homebuilder
- Advance Cost Accounting

At a Glance

Steve Chin
Sr. Software Engineer

IT / Business Liaison
Support JD Edwards, Insight

Former JDE Consultant



- One World Xe Co-existent since 2001
- Heavy use of FASTR and World Writer
- Minimal ERW uses as it created performance issues
- Uses Business Objects as BI
- Hired contractor to extract data via SQL
- User heavily extract to Excel directly from AS/400
- Each movie title is a business unit
- Each movie format (DVD, Blue-Ray, VHS, etc) is an inventory item
- F0911 has over 500M records
- F4111 has over 400M records

Insight Profile

- Insight Customer since July 2009
- 24 Insight Reporting Users
- 16 Insight Console Users
- 1 Insight Administrator User
- No formal training
- 1 day of paid consulting for strategic direction since 2009
- 2 days of free consulting training since 2009



insight
reporting



insight
console



insight
administrator

Area SmartSets
General Ledger
Accounts Receivable
Inventory



insight
designer

Who's who?



Reporting Users

Use **Insight Reporting™** to create and view business information with 100s of prebuilt SmartViews™



Console Users

Use **Insight Console™** to view and interact with results from **Insight Reporting™** and **Insight Budgeting™**



Administrators

Use **Insight Administrator™** to monitor and manage the **Insight Software Suite™**



Designers

Use **Insight Designer™** and **Insight Reporting™** to create custom SmartViews™ for **Insight Reporting™**

What do you do with this report once you have it?

- Insight Reporting allows business users and/or IT analysts to quickly build and publish interactive and dynamic (flexing) reports. As part of the reporting building process, Reporting users interview Console users (recipient) asking how they use the report.

Does the report generate more questions?

- Minimize and/or eliminate additional questions. Reporting user build links (similar to drills down) that answers these specific questions. When questions arise, it's very specific and calls are made to the appropriate party.

Are you exporting data to Excel to find the needle?

- Reporting user build exception type reports displaying the needle in the haystack and provide the ability to drill down for additional information.



Insight Links™ drives answers by linking reports to each others. Like other tools you can link summary to detail.

Unlike other tools, Link leverage JDE data dictionary allowing the transition of data item from one report to another. We're talking about MCU from X to MCU from Z independent of any table.

Whew!! More answers.

What can Insight answers for you?



How delivering answers delivered a solution?

- Downsize central IT function
 - IT no longer able to provide reporting development services
 - Fits nicely between Business Objects and JD Edwards
 - Insight is JDE data in a self serve environment for business user and their customers
- Business user builds interactive report, publish interactive report instantly
 - Interactive reports for formal financial reporting such as title audits
 - Daily ad hoc data needs for pre, during and post month end
 - Real time inventory analysis
- Console (customer) access data when they need it
 - Access any reports if business user grants permission
 - Full drill downs to all pertinent area to answer their own questions
 - Question now are very specific and to the right department

Insight single Inquiry/Reporting interface FIXES JD Edwards weaknesses

- Insight user interface is Office-like with Excel capabilities and easy to use
- Users can aggregate data on the fly
- Users use category codes at all levels for ADDED inquiry/reporting purposes
- Users can query on ranges of data with AND/OR in my filter (header) and QBE
- Users don't need to use the Row Exit
- Users don't need clunky native tools like UTB and ERW
- Users don't run reports in CSV or grid export to Excel and spend hours preparing data. But, users can single click export to Excel with all formatting
- Users can create a cover page for instant report documentation
- Users can create drill downs
- Users can publish reports instantly with all the above

Users can do all the above and more BY THEMSELVES and THEY love JDE again

Insight Customer Driven Webinar Series

June 22, 2011 – 9AM PST

District of North Vancouver
Shares how they gain User Acceptance with
Reports that RESONATE

<http://www.insightsoftware.com/events/webinars/77>

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Questions?

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Thank you for your time and interest in Insight Reconciler, I'll be happy to answer any questions you may have.