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Insight[®] Overview



Insight₂JD Edwards

Ever wish the information in your ERP system could talk?

Key Benefits

Insight[®] is a real-time productivity tool designed to optimize and improve the performance of your business. Real-time reporting, data reconciliation, integrity management and business process optimization are achieved quickly and easily with this powerful, end user tool. You will:

- ▶ **Increase profitability:** increasing visibility into issues affecting your margins
- ▶ **Improve productivity:** reducing resources spent answering ad hoc questions, reconciling accounts and investigating integrity issues
- ▶ **Reduce expenses:** replacing the need for costly custom reports and time-consuming, manual processes

This enables you to make the really important decisions that will drive your business goals and objectives!



Bring your data to life with Insight[®]

Business Optimization Software

Be better with Insight[®], a complete solution that leverages the best of spreadsheets, standard report writers and Business Intelligence tools while removing their limitations. Optimize your processes with:

- ▶ **User friendliness of spreadsheet tools PLUS consistent security and data integrity**
- ▶ **Simplicity of an end user solution PLUS rich functionality including ad hoc aggregations, hierarchies, consolidations and calculations**
- ▶ **Real time access to ERP data PLUS end-user customization and drill down to transaction detail**

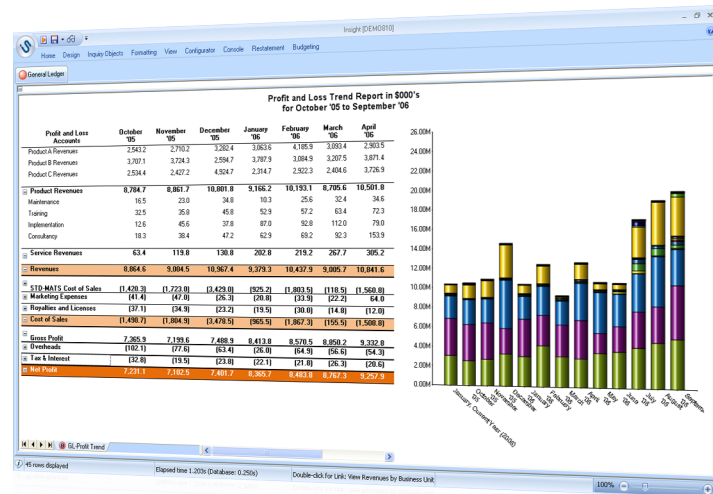
Your Enterprise Resource Planning (ERP) system does an excellent job of storing information for your organization's processes. However, the answers to business questions are often locked away and can be challenging to extract, especially on a real-time, ad hoc basis. Insight[®] empowers you to access live information easily. You will improve efficiency for reporting, analysis, audit, reconciliation and requests for information.

Insight[®] is more than a reporting tool. It addresses the challenges associated with information access within your business process, such as ensuring data integrity, shortening the steps in the process itself and improving operational visibility. Too often, a lack of information visibility can lead to costly oversights and inaccurate reporting. In addition, you can push inquiries to all operational users, empowering them to make more informed decisions. Be more effective with Insight[®], a solution designed to optimize your business processes.

ORACLE[®] PARTNER

A Better Experience

- ▶ **Better Cash Management:** Improve cash collection by distilling and refining vast quantities of invoice data, in real-time, into a meaningful summary form
- ▶ **Better Budget Cycles:** Maintain control and integrity with a central work flow model where the budget creators, budget holders and budget approvers all work from a single source of truth
- ▶ **Better Month and Year End:** Speed up your month end close by proactively identifying integrity issues that keep you from closing the books
- ▶ **Better Payables:** Maximize supplier discounts and payment terms with increased insight into buying habits and vendor performance
- ▶ **Better Supply Chain:** Optimize scheduling, increase sales margins and better manage inventory and purchases by assessing an item's impact across your supply chain processes
- ▶ **Better Project and Employee Management:** Reduce costs and errors with daily monitoring and analysis of labor and burden expenses
- ▶ **Better Implementations:** Reduce dependence on IT resources with end user validation of correct data and accurate balances



▲ Profit and Loss Report

Insight® currently consists of several pre-packaged solutions to manage and build your own reports and ad hoc inquiries. Experience better operational visibility with the following modules:

Financials

General Ledger: Speed up your month end close using our GL module. Aggregate your financial data in real-time, produce management reporting packs and perform exception analysis with full drill down to instantly answer questions.

Accounts Receivable: Improve credit-control and lower your DSO. Run uncomplicated invoice and receipt matching, create live, "As Of" debt aging and monitor cash flow.

Accounts Payable: Secure vendor discounts by documenting early payments. Leverage favorable payment terms and discounts. Maximize cash flow by reducing overpayments.

Fixed Assets: Create consolidated Fixed Asset schedules in minutes. Analyze assets in meaningful ways such as by category code. Calculate Net Book Value and salvage percents.

Budgeting & Forecasting: Eliminate spreadsheets with on-line budget submission. Reduce time spent to create, distribute, evaluate and approve your budgets. Immediately compare actual to budget and analyze effects prior to upload.

Advanced Cost Accounting: Improve margins and better manage costs with online, flexible access to Advanced Cost Accounting. Analyze revenues and costs by customer, product, region and more.

Currency Restatement: Increase profit margins and eliminate the need for time-consuming month end programs. Perform restatements on-the-fly from any currency, online and in real-time.

Sales Tax: Reduce penalties and late fees. Examine taxes by business unit or category codes to stay in control of this essential area of finance.

Human Capital Management

Human Resources: Scrutinize employee setup, terminations, turnover and EEO compliance. Perform what-if analysis for pay increases or benefit changes. Create actual to budget variance reports for position amounts, hours and FTEs.

Payroll: Reduce resets and voids with proactive monitoring of timecards. Aggregate labor, PDBAs and taxes by any attribute, even across companies. Avoid security issues with direct data access. Speed up your reconciliation process with links to the GL.

Time Sheet: Ensure proper margins with exception reporting that highlights rate and recharge overrides. Compare labor and equipment billings and expenses across jobs or regions and apply resulting analysis to future bids.

Manufacturing & Distribution

Sales Order Processing: Lower your DSO with increased insight into top customers and payment habits. Effortlessly evaluate your margins by region, customer or product line. Trend revenue and costs and highlight downturns or expense increases.

Inventory: Uncover products with poor turnover ratios. Proactively check availability and valuation of inventory across multiple branches. Identify where costs are lower by any attribute.

Purchasing: Combine information such as: commitments, purchase orders, 'received not vouchered' data, all on one screen. Secure better discounts, consolidate vendors and monitor buying habits and performance.

Manufacturing: Proactively identify and correct labor and material cost variances and overruns before month end. Optimize shop floor scheduling with weekly analysis of work order schedules and work center capacity to improve planning and eliminate scheduling mishaps.

Project & Asset Management

Job Cost: Quickly spot trends and highlight inefficiencies to increase project margins. Easily spot expense over runs, budget variances and incorrect billings. Address issues immediately and redirect resources and accommodate changes to job or schedule.

Optimize your business processes with Insight®. Be better at:

- ▶ Inquiring and reporting on any dimensions of your data for complete insight into your operations
- ▶ Summarizing and combining large volumes of records in real-time for faster reconciliations
- ▶ Drilling down to live transaction detail to further investigate or reconcile issues
- ▶ Showing and pivoting information in tabular report form or with charts and graphs to make quick and accurate decisions
- ▶ Highlighting exceptions and variances to proactively manage or change a process
- ▶ Publishing and pushing inquiries to business users with ERP security intact
- ▶ Exporting inquiries and report packs via Excel or PDF while ensuring data relevancy and integrity

All of this can be done in real-time. The right people get the right information, right when they need it.

Top 10 reasons why customers love Insight®

- ▶ Designed for end users
- ▶ Online, real-time information
- ▶ Exceptional performance
- ▶ Intuitive and easy to learn
- ▶ Accesses ERP data directly
- ▶ Honors ERP security
- ▶ No additional IT infrastructure
- ▶ Installs in less than 1 hour
- ▶ Pre-packaged solutions
- ▶ Immediate return on investment

Evolve your Reporting Process

Insight® optimizes your ERP system to change the way you manage your business forever.

- ▶ **Improve reporting with real-time hierarchies, expanded data accessibility, drill down to live transactions, flexible selection criteria and elegant formatting**
- ▶ **Control information flow by ensuring a “single source of truth”, your ERP system, facilitating SOX and internal audit compliance**
- ▶ **Highlight integrity issues and address those issues before they impact your margins**
- ▶ **Immediate analysis of your business data not only allows for more timely decision making, but increases productivity across the enterprise**
- ▶ **Gain insight to your information by overcoming obstacles within all facets of your business processes**

Many clients use Insight® for their:

- ▶ **Period-end reporting crunch**
- ▶ **Ad hoc requests for information**
- ▶ **Analysis and comparison needs**
- ▶ **Budgeting and forecasting**
- ▶ **Reconciliation and audit issues**
- ▶ **Data integrity and reliability checks**

Contract Service Billing: Decrease ‘days billings outstanding’ and obtain cash quicker. Reduce billing disputes and write-offs to increase margins. Scrutinize revenue, markups, and expenses by expense type, work order, region or across companies to immediately address issues.

Homebuilder: Seamlessly link to all pertinent product offerings, sales detail, materials, labor and subcontract information from one report. Flag items affecting your margins to address issues immediately. Improve insight to which building sites are most productive, profitable, on-time and on-budget.

Information Management

Console: Put information into the hands of decision makers. Push inquiries out in a single click with security intact. Give users ability to interact with live information by changing selection and filter criteria and drilling down to transaction details.

Configurator: Provides ‘controlled customization’ to pull data elements from other related files, tailor inquiry views for Console users and create or modify templates to streamline report creation and ensure consistency.

Administration: Easily view and manage all your inquiries and templates. Streamline the granting of user licensing, capabilities and permissions. Simplify Sarbanes-Oxley compliance with reports displaying who, what, when creation and change detail.

Insight® is easy to learn for users familiar with Microsoft’s desktop tools, providing pre-packaged templates so you can start running inquiries immediately. You do not need to understand complex file joins or field names. You simply point, click, drag and drop the information the way you want to view it. Improve analysis with access to thousands of data elements, like category codes, as well as the ability to pivot data, highlight exceptions, create custom calculations and generate what-if scenarios. Also, you can easily link to related information in other modules.

Insight® accesses data in real-time, allowing you to spot issues by aggregating information and drilling down to the supporting, live transactions for further investigation. Direct access ensures a single source of truth for operational information, your ERP system, eliminating data integrity issues. What’s more, Insight honors your ERP security settings. Therefore, users will only see exactly what they are permitted to view. Insight® does not require extensive IT resources or infrastructure. It installs within an hour and the software and upgrades are deployed with ClickOnce technology. Furthermore, Insight® makes compliance with Sarbanes-Oxley simple and efficient. On-line access to all aspects of your ERP information improves user productivity, increases profitability, reduces costs and enhances decision making.

For more information, please visit www.InsightSoftware.com or call 1-888-INS1GHT

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