



About Jersey and the States of Jersey:

- The British island of Jersey is a parliamentary democracy which is a dependency of the British Crown (it is not a part of the United Kingdom, nor is it a colony)
- Jersey has a legislative assembly called the States of Jersey and a system of local administration, fiscal and legal systems, and courts of law
- Jersey has a population of more than 89,300 and a strong economy
- The main industry is international financial services, supported by tourism and hospitality, retail, construction and agriculture and fisheries
- www.Gov.Je

The States of Jersey relies on Insight Software Suite for JD Edwards to speed up reporting, control budgets, and monitor value for money

“The functionality of Insight Console gave us a very simple user interface, and we made extensive use of some of Insight’s more advanced functionality (time series, hierarchies, reusable object inquiries) to produce comprehensive, flexible reporting.”

Alisdair Macleod

Project Accountant

The States of Jersey

Organizational Challenge: Need to speed and simplify reporting

The States of Jersey provides a full range of public sector services to over 87,000 citizens of the Island of Jersey. Departments including education, police, fire, housing, courts, prisons, treasury, airports, planning and the environment, and harbors, to name just a few, have complex operational requirements. To address these needs with greater efficiency, the States of Jersey implemented JD Edwards in 2002.

While JD Edwards provides excellent data-gathering and enterprise resource planning (ERP) capabilities, the States of Jersey found some reporting to be a challenge. There was limited functionality on the inquiry screen, particularly on category code inquiries. Manual, paper-based reporting became increasingly cumbersome and time-consuming.

“It rapidly became almost impossible for us to write all of the needed reports in terms of the time, cost, and resources required,” says Alisdair Macleod, Project Accountant, the States of Jersey.

Alisdair is the head of the systems team for the States of Jersey which is charged with implementing and maintaining JD Edwards products across the government. While some reports were time-consuming, some were actually impossible, says Alisdair. For example, the inability to drill down to analyze issues was a serious hurdle, especially for management accountants.



Benefits:

- Simplification of month-end reporting and dramatically shorter year-end process
- Rapid access to real-time, detailed information improves overall financial management
- User empowerment enables the systems team to focus more on core systems issues
- Procurement as well as budget details are available as the Inquiry Suite expands
- GAAP-compliance is facilitated

Solution:

JD Edwards EnterpriseOne™,
Microsoft® SQL Server® 2005

Insight Software Suite for JDE

- Insight Reporting™
- Insight Console™

To solve these problems and streamline its JD Edwards reporting, the States of Jersey implemented Insight Software Suite for JD Edwards.

The Financial Reporting group either built the reports themselves in Excel or they asked their IS Department to build inquiries for the group to load into Excel and modify. To modify reports in JD Edwards, the group often needed to call in an outside consultant.

Solution: Insight Software Suite for JD Edwards

Insight overcomes many of the issues involved with native report-writing tools by making all aspects of the general ledger data available online, in real time. "Insight was the only product we saw on the market that met our requirements for effective JD Edwards reporting," says Alisdair.

Insight Reporting™ was first installed at the States of Jersey in 2003 to assist the Health and Social Services department with its complex reporting requirements. Insight Reporting™ is used by a growing roster of nearly 300 States of Jersey departmental personnel, including operational managers, budget holders, and financial staff as well as the systems team.

"Insight has a lot of power, but it's also very simple for those who want to keep it simple," Alisdair explains. "So it matches each person and their departmental requirements. It's very flexible, and the only real limitations to Insight are the user's imagination and their will to get at the information," he states.

As the use of Insight Reporting™ expands across the States of Jersey, the solution's ease of use and flexibility are major advantages. "The training goes very easily, and once the users start, they self-teach in many cases," says Alisdair.

Alisdair notes that InsightSoftware.com's support is excellent. "We keep in close contact with them, but there is no need to be on the phone all the time because Insight is so stable," he says. "Each new release of Insight has added functionality, and the upgrades are very straightforward from a technical point of view."

During its years using Insight Software, the States of Jersey has provided feedback to InsightSoftware.com that has helped enhance product capabilities not only for the States of Jersey but for all users of Insight. "We've seen InsightSoftware.com come along and meet requirements we've identified. We were keen on the procurement side, for example, and those modules are now available. Insight is continually evolving, and we get a lot of value out of that," Alisdair notes.

Benefits: Streamlined reporting, budget control, and empowered users

"At one time, we could have waited overnight for the journal to enter, but now we need the real-time element that Insight provides," says Alisdair. "With Insight [Reporting], we can post data, and within a matter of minutes the inquiry is completed and the financial statement is produced in its corrected form," he explains.

User empowerment is key. "The power users can take on inquiries and allow the systems team to get on with other work," says Alisdair.

A significant example of this is the preparation for the first year-end using Insight Reporting™. “The power users wrote all the needed inquiries for the year-end process, and we’ve had a trial run to prove the concept. We expect the inquiries to run in a day, and the consolidation effort for year-end could have taken two months in the past.”

“Time is one side of Insight’s advantages, since the lead-time for systems to prepare and deliver reports is eliminated. But it’s a cost issue as well,” states Alisdair. “We had only limited report writing capability within the team, so we were using outside consultants for much of this work. With Insight [Reporting], those external costs are cut dramatically,” he explained.

Advantages Span Budgeting and Distribution

One of the roles of Alisdair’s team is to improve financial management, and this is a vital benefit of Insight Reporting™. “Because we are public sector, we hold budget at low levels, and Insight [Reporting] is very important for budget control,” says Alisdair. “In addition, we are using Insight more now to look at value for money. We’re looking at procurement and supply-spend, for example, and Insight will help us get best value out of the money that we do spend,” Alisdair explains.

Security Is a “Huge Win”

Security is a major issue in the public sector, and the States of Jersey has approximately 100 different companies set up in JD Edwards that define the security needs of its many departments. “Prisons versus harbors, for example, they each have distinct and confidential information to protect. Insight maintains all of the security we established in JD Edwards, and this is a huge win.”

Investment in Category Codes is Preserved

The top feature of Insight Reporting™, according to Alisdair, is that it delivers rapid category code analysis. “We put a lot of thought about how we set up category codes in JD Edwards, and then after investing quite a bit of time, we found we couldn’t get at them easily,” he explains. “Insight solves that, especially in the General Ledger [Smartset]. In my opinion this is the greatest power of Insight [Reporting], and our users are totally reliant upon it now,” he notes.

“As the reports are so easy to use, we have been able to roll them out without an extensive training effort - central training has been limited to some short videos and a simple user guide.”

Alisdair Macleod

Project Accountant

The States of Jersey



InsightSoftware.com’s Solution

Insight Software for JD Edwards empowers users to create simple, real-time inquiries to answer business questions. This improves productivity for reporting, analysis and reconciliations.

Companies using Insight gain quick access to information to increase efficiencies, enhance revenues, reduce costs and optimize cash flows.

The Bottom Line:

For the States of Jersey Insight streamlines access to real-time financial data direct from JD Edwards. Insight helps assure data accuracy and supports proactive, informed decision making.

By freeing IT and accounting staff for core business efforts and reducing the time and paper associated with manual reporting, Insight is delivering ROI and significant cost savings.

As the States of Jersey consolidates its business entities, Insight will scale easily and these same benefits will apply company-wide.

Benefits Expand as Insight Expands

"The Fixed Assets [Smartset] provides visibility into asset cost appreciation and other details. Rather than the systems team writing ERW reports, Insight now empowers these users to meet their own requirements," says Alisdair.

"One of the opportunities we're working on is improving supplier management, and the latest Insight modules will be a great help with this," says Alisdair. "For example, we may want to analyze how much of our spend is on-island or in the UK and add a bit of other classification. Using the address book category codes, we can use the AP [Smartset] to group suppliers by merchant category or to create statistics for effective contract negotiation," he notes.

Flexibility to Support both Financial and Operational Users

"Some departmental users including finance people and management accountants tend to be power users of the Insight [Smartsets]," says Alisdair. However, the operational managers, such as school headmasters or staff in charge of hospital wards to note just two examples, are responsible for assets and budgets but are not finance specialists.

To serve this second group, the States of Jersey purchased site licenses for Insight Console™, something which ensures that key decision makers can easily access important information in real time. With the Insight Solution, the systems team can quickly build custom inquiry screens to meet the needs of individual people or departments.

Insight Reporting™ Simplifies GAAP Compliance

The States of Jersey is finalizing an initiative to ensure GAAP compliance, and Insight is a major tool in this effort, according to Alisdair. "My team will use [Insight Reporting] to create the inquiries for Console users. Effectively, we'll be replacing paper reports with access to rich information, enabling the users to drill down for more details," says Alisdair.

In consultation with the States of Jersey team that is rolling out the GAAP project, the systems group is developing a series of pre-written inquiries and will publish them to the managers. "They will be able to load the inquiry easily and get the information they need to manage their budgets on a month-to-month basis," Alisdair explains. "But beyond revenue expenditures and how they are doing against budget, managers will also be able to keep an eye on orders and receipts and a whole range of detailed financial information using Insight," concludes Alisdair.

For more information please visit www.InsightSoftware.com