



Customer Services Overview

Are you ready to take your skills to the next level?

Key Benefits

Our services help increase your Insight® knowledge and efficiency to quickly impact the return on your investment. Our Product Specialists, Trainers and Support Consultants help you:

- ▶ **Increase Profitability:** Understand the best way to bring visibility to your revenue and expenses to immediately identify issues impacting your bottom line
- ▶ **Improve Productivity:** Expedite answers to business questions with a better understanding of how to create and customize reports
- ▶ **Enhance Decision Making:** Ensure your reports are accessing mission critical information and highlighting issues affecting your strategic decisions
- ▶ **Gain Expert Tips and Tricks:** Transform your data into information quickly with new techniques learned in our classes



InsightSoftware.com is ready to help

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**

Just as Insight's suite of products optimize the performance of your business, our Consulting, Training and Support services are designed to provide you with the fastest possible return on your investment. Organizations who take advantage of our services improve efficiencies and save money and resources. Additionally, customers more quickly gain visibility to key business indicators to drive higher levels of organizational performance. Our services help you get your implementation off to a solid start. As your organizations' use of Insight increases, we can help ensure that you continue to get the most from your Insight® experience. If you stumble along the way, our support services will get you back on track. In short, we help you better achieve your business goals and objectives, maximizing your return on investment. Be more effective with services designed to optimize your business processes.



Optimize your business practices with consulting solutions such as:

- ▶ **Best Practices:** We provide methods for maintaining standards and creating scalable security and deployment methodologies
- ▶ **Insight Reconciler™ Workshops:** Our specialists assist you in modifying the reconciliation templates to quickly identify possible integrity issues and provide the detailed information needed to resolve those issues.
- ▶ **Stronger Power Users:** Clients who develop well-trained internal Power Users enable their entire organization to better use Insight® - we turn a good user into a great user
- ▶ **Audit Readiness:** Our experienced consultants can show you how to use the integrated tools available in Insight® to prepare for periodic audits in a fraction of the normal time

Top 10 reasons why our 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

Consulting Services

Our Product Specialists have decades of industry and Oracle/JD Edwards experience. Therefore, they are uniquely qualified to provide insight into the most efficient ways to steer you towards a winning solution. Our expertise can help you provide solutions to real business requirements across all areas of your business. Although each consulting engagement is uniquely tailored to your needs, typical engagements may include: best practice reviews, Insight Reconciler™ workshops, optimization of report design, assistance with report creation, audit preparation and more. The highest level of value, however, is in the area of Business Optimization Solutions. Our consultants are experts at maximizing benefit from our pre-built solutions, over your unique data and process parameters. Working with our specialists to configure your Optimization Solutions brings the fastest time-to-benefit, enabling opportunities for reduced cost, increased cash flow, and improved productivity. As your needs and capabilities increase, our services can help insure that you continue to get the most out of your Insight® experience. With Consulting Services on your side, you can further increase your return on investment from Insight®.

Typical Consulting Engagements

Best Practices for Administrators: Create improved folder structures and report deployment strategies, use custom searches and logging to trace user issues and for audit readiness; employ auditing and naming conventions to better control large volumes of reports.

Best Practices for End Users: Learn naming conventions and capabilities to better manage reports and business-critical information.

Ad-hoc Advanced Training: Training is typically held with one or two users in a workshop environment. You will work together with a Product Specialist to create and improve reports while being trained on relevant, advanced capabilities.

Insight Reconciler™: Using our powerful templates, we'll work with you to identify reconciliation issues in your data. Then, we'll help you define a monthly process to proactively manage ongoing reconciliation issues.

Meet Critical Deadlines: Sometimes you need reports quicker than your users can create them. Engage a Product Specialist to help you get a set of reports done quickly.

Reporting Review: Make sure you're reports and inquiries are created to deliver the best information, run in the shortest time, and give users what they need to best fulfill their responsibilities. Periodic reviews with one of our Product Specialists will make your users more effective.



Training Services

InsightSoftware.com's training specialists have extensive experience with Insight®. Our product specialists have developed the most efficient training methodology to ensure your organization understands the capabilities of the tool and quickly integrating these reports into your key business processes. Our instructors guide you through the features and functionality of Insight®, providing you practical and relevant hands-on experience. To further your productivity after you attend a course, you will have full access to our catalog of Quick Reference Cards. These cards ensure that all the important tips and tricks you learn during the training class stay with you.



Organizations who take advantage of our advanced user training classes save even more time, money and resources. These courses teach you how to create complex reports and inquiries, configure standards and administer the system. You will also learn how to effectively roll out inquiries to the business users who rely on the information to run the business. Additionally, expert users can attend a Train-the-Trainer course to become skilled at teaching others within your organization. InsightSoftware.com wants to help you get the most out of your Insight purchase. Therefore, we create fundamental, entry-level training courses and ongoing, advanced user classes to help you achieve your business goals and objectives.

All courses include a training manual, access to a library of quick reference cards and are eligible for CPE Credits!

Courses

- ▶ **Functional User Training**
Learn the core features essential for ad hoc inquiries and simple reporting. 1 ½ days Functional User Training + ½ day per module thereafter
- ▶ **Advanced User Training**
Create complex calculations, sophisticated hierarchies, custom links and other powerful features to unlock the full potential of real-time inquiries and reporting. 1 day
- ▶ **Core Training**
Combine the Functional and Advanced User Training with module specific overviews and an advanced report creation workshop. 3 days
- ▶ **Insight Administrator™**
Learn to centrally control and manage the Insight environment and identify Sarbanes-Oxley auditing issues. 1 day
- ▶ **Insight Designer™**
Learn how to build custom templates by selecting standard or custom JDE tables and defining their relationships. ½ day
- ▶ **Insight Console™**
Learn how to build reports for the Insight Console user. Create training materials for fast rollout to Console users far and wide. 1 day
- ▶ **Insight Budgeting™**
Learn how to create a budgeting framework and set-up set up a real-time budgeting process by the end of the course. 2 days

Support Services

We offer world class customer support through our offices in North America, Europe, and Australia. Our staff has a broad and in depth knowledge of Insight® and we pride ourselves on being able to quickly respond to your requests and ensure your operations are running smoothly and efficiently. Our experienced customer support staff can help with issues surrounding inquiry creation, system configuration, software installations and upgrades. The most effective way to access customer support is via our Customer Support Portal. The portal provides 24/7 access to log cases, manage existing cases, browse 'Frequently Asked Questions', peruse documentation and view recorded webinars.

The Customer Support Maintenance program includes the following services:

- ▶ **Web Case Management:** We provide issue and enhancement logging capabilities through our web site
- ▶ **Telephone Support:** We provide either regional or 24 x 5 support programs depending upon the subscribed level of service required
- ▶ **Customer Support Portal:** Our Customer Support Portal provides 24/7 online access to log and manage cases, product downloads, solutions documentation and frequently asked questions
- ▶ **Webinar Training:** A series of complementary webinars provides training and information on specific aspects of Insight's solutions
- ▶ **Software Updates:** Generally, we provide one major release per year, one minor releases per year and service pack updates as needed
- ▶ **Documentation:** Our documentation is extremely comprehensive for both the end user and IT administrator
- ▶ **General Communication:** We provide periodic newsletters and other general communications to support our clients



Getting a Better Service

WE offer first rate customer support via our offices in the North America, Europe, and Australia. You will work with a staff which has an in depth knowledge of Insights and takes pride on quickly responding to your requests. Their thorough analysis and ability to support you quickly ensures you are running smoothly and efficiently.

The most efficient way to access customer support is via our Support Center. The Support Center lets you log cases, manage existing cases, and browse



Schedule a Demo
with one of our specialists

Request a Trial
including set-up and support

Services

Customer Support

Training and Education

We continually expand the features of our product, many of which come from customer requests. With the purchase of our software, all software updates are included. Major and minor releases may also include new smart sets and enhancements. To coincide with new software release schedules, we provide extensive documentation updates for major releases and a complete set of release notes for minor and service pack releases. Finally, we strive to update you on a periodic basis through our website, newsletters and other communication channels so that you have the information you need to keep you "in the know".

For more information, please visit www.InsightSoftware.com or call 855-INSIGHT

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