

Automated Analytics. Powerful Insights.

EiB Financial Analytics Case Study

Core Business

Autism Initiatives UK and its subsidiary, First Initiatives are registered charities whose primary aims are to meet the needs of people with Autism, learning disabilities and or mental health problems. Autism Initiatives also assist their families and carers throughout the UK by providing a comprehensive range of services which are person centered, professional and innovative. The organisation currently provides direct support for over 600 individuals in over 80 locations throughout the north of England, Isle of Man, Northern Ireland, Scotland and Ireland.

Reporting Background:

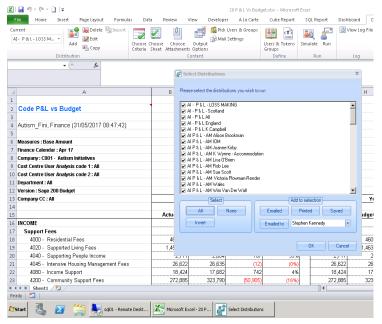
Prior to the implementation of EiB Financial Analytics, the reporting process at Autism Initiatives and First Initiatives was extremely labour and resource intensive. It required the extraction of a detailed Trial Balance from Sage 200 into Excel, and the use of Excel Macros to disseminate the result into over 100 spreadsheets with a variety of links and cross checks to produce reports for each of their Cost Centre Managers.





"I still ask myself, 'How did I manage before, without EiB Financial Analytics'. I would thoroughly recommend that any organisation with multiple Cost or Profit Centres needing a flexible, easy to use Sage 200 reporting solution to take a look at EiB Financial Analytics"

Janice Howard, Financial Director

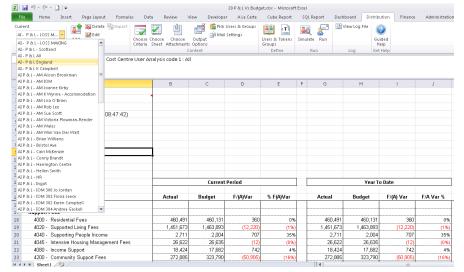


Once produced, each set of spreadsheets for each Manager had to be manually saved and then attached to individual e-mails, resulting in this process alone taking up to one day to complete. "Maintaining such a large and complex reporting environment proved a challenge particularly with only one person in the organisation having an in depth understanding of the configuration of our Excel Worksheets", says Janice Howard, Finance Director at Autism Initiatives. "What we required was a solution that would simplify and shorten our process and provide the flexibility of reporting we needed".



EiB Financial Analytics Solution:

"One of the keys to ensuring value for money and effective management of a charity's resources is to be able to comprehensively analyse and interrogate our entire cost base" adds Janice. "The EiB Financial Analytics product allows us to produce a whole variety of Profit & Loss, Balance Sheet and Summary Unit reports by Manager, with the reports being updated seamlessly in background mode at month-end. Having produced the reports, we are also able to drill back into underlying detailed transactions behind any number on any report. This is essential for



identifying variances at any point in time and checking data validity."

Improvements & Benefits:

"EiB Financial Analytics is now the source of all our Monthly Management Reports" says Janice, "Detailed Transactional reports by each Operating Unit (which were not easily available for distribution prior to the installation of EiB Financial Analytics), are now readily available.

Furthermore, by using EiB Financial Analytics' Report Distribution Module we can now select specific reports for each relevant Cost Centre Manager, and have these automatically emailed out without any user intervention or delay. We can also attach other non-Excel based documents using EiB Financial Analytics's Report Distribution Manager to include these as part of the overall report pack.

The key benefit to us as an organisation is the flexibility of reporting and the ease and timely distribution of our management reports. EiB Financial Analytics shaves up to two days per period off our former reporting process and improves both the accuracy and presentation of our results."

Of course, product is only one part of a Management Reporting solution, the other factor is the people used to implement and assist companies like Autism Initiatives "We were quite demanding as a customer, but every query and question resulted in a solution and the virtual training was excellent. Excel in Business have been very personal and professional throughout our entire implementation.

EiB Analytics Products Deployed:

EiB Financial Analytics - Sage 200

Financial Reporting Module

- Report Distribution Manager Module
- Management Feedback Module

Further Information:

For further EiB Financial Analytics case studies and product information, please visit www.excelinbusiness.com
For information specific to this case study contact casestudies@excelinbusiness.com

