

## St Mary's achieves true dynamic financial reporting with Inside XL

*If you know Excel, you can use Inside XL. Collect and merge data from various ERP sources into a single Excel spreadsheet. You'll never need to retype another number in Excel again.*

### The University

With an original intake of just six students, St Mary's has now grown to around 6,000 undergraduate and postgraduate students across four academic schools. Established in 1850 and with a deep heritage in education, St Mary's has a strong reputation for teaching excellence and a student-centered approach.

### The Challenge

St Mary's University were not satisfied with their existing finance reporting process. It was difficult and time consuming to make changes to existing reports. Although, the existing reporting solution delivered reporting outputs in Microsoft Excel, the University's preferred presentation format, simple tasks like adding a new row or field in a report took up to a day to accomplish.

It was also challenging to make changes to the way the existing tool queried the accounting system. Drilling down across the accounting balances and transactions was also difficult.

### The Selection Process

The University are fortunate to have a very close working relationship between finance and IT systems. John Langford, Finance Systems Manager comments, "The University decided to go to market and look at a range of tools to solve their challenges. Having looked at various other solutions, 12 financial and technical staff attended a demonstration of Inside XL. It was unanimously decided by all 12 staff that Inside XL was the tool that would best fit the university's requirements.



"A key factor for selecting Inside XL, was that the team saw the huge potential to deploy the software beyond finance to other areas of the business, by linking Inside XL to other data sources like estates, procurement, student records and other external data sources which the other options could not do, or did with some effort."

### The Inside XL Solution Accounting

Inside XL was implemented very quickly by the University to report live from their accounting system Open Accounts and produce perfectly formatted reports in Microsoft Excel. Inside XL is very easy to master as the front-end is Microsoft Excel. Users can write and change reports with ease, as they are already familiar with the Microsoft Excel environment.

Whether Inside XL is used to produce month end packs or ad hoc query and drill down, it is lightning fast compared to the previous reporting tool. As Inside XL is an add-in to Microsoft Excel this all can be done in a spreadsheet environment.

*"Reports that used to take days to produce can now be produced in hours using Inside XL"*

### Budgeting and Forecasting

The software has allowed the University to use the functionality of Inside XL to prepare budgets and re-forecasts in spreadsheets. These can then be written directly back to the accounting system.

### Beyond Accounting

The University have also used Inside XL's full data extract, translate and load functionality to link data from their procurement and student data system into the same spreadsheets they use to report from their accounting system. In addition, Inside XL has also been used to access geographic postcode data to assist the University Student Services department's reporting.

### The Result

"Inside XL has delivered the dynamic and intuitive reporting environment our Finance Team needed on a daily basis. The benefits of the system are also adding value to the whole University" says John Langford.

### Data Sources Used

Accounting: Open Accounts  
Procurement: Parabilis  
Student Records: Unit4  
External web sources

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