

# CUSTOMERS

## Government of Bermuda Improves Financial Reporting With Crystal Reports XI

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*Alvin Goulbourne, Management Accountant, Government of Bermuda*



### Industry

Government—  
Financial

### Business Pain

The Government of Bermuda's outdated reporting solution provided limited access to reports in Excel format only.

### Why Business Objects?

Crystal Reports Server XI provides web report delivery, flexible output options, improved data quality, scheduling, and more flexible security—as well as improved access to financial data for more end-users.

### Business Objects Products and Services

Crystal Reports

Crystal Reports Server XI

## Challenge

Employing approximately 4,500 people, the Government of Bermuda's Ministry of Finance is charged with maintaining and controlling all the government's financial records and providing advice for management purposes. As such, the ministry is the government's authority for accounting expertise, financial information, and systems support. To assist in its mission, the ministry's information systems department is charged with identifying end-user needs in order to continually improve the quality of government-generated financial and management information.

Every day, the ministry deals with critical financial information that affects the more than 60 departments in the Bermudian government. Lynne Snee, project manager in the accountant general's department under the ministry of finance, says, “We used an outdated, green-screen financial reporting solution for so long that we were complacent about how well we were fulfilling users' needs. Many employees weren't even aware that they could ask for different reports, and it's been too long since we've surveyed users about their information requirements to help them work more productively. This directly impacted how well we functioned as a department. We needed to move beyond a limited legacy reporting solution that only a few people knew how to access and use.”

Over the years, the finance department amassed more than 1,300 reports that extracted financial data from the government's J.D. Edwards World database. Rife with duplicate information, this report library needed to be overhauled to ensure all reports were relevant and in good working order. According to Alvin Goulbourne, management accountant for the Government of Bermuda, restricted output and nonexistent scheduling capabilities limited the solution's usefulness. “We had only one output option, Microsoft Excel, which limits the presentation of the data,” he recalls. “We also had to manually import the data into Excel. All reports resided on our departmental server. With no distribution or scheduling capabilities, only those who knew about the reports could retrieve the data.”

The Government of Bermuda needed to act quickly to replace its old reporting solution with a business intelligence (BI) solution that would enable easy access to financial information. Snee says, “We knew our employees could be doing more with our data, and we needed to find the right tool for them to do that.”

## Approach

The government needed a technology partner with J.D. Edwards experience who could help it migrate the legacy reporting solution to Crystal Reports® Server XI, a Business Objects solution that includes Crystal Reports XI Professional Edition. Snee says, “Crystal Reports had all the functionality we lacked – easy publication to the web, simple access to reports via a single URL, and flexible output, scheduling, and security options. All we required was a partner to help us make the change.” Unity



Enterprise Solutions, a Business Objects Technology Partner based in the United Kingdom, stepped forward with its innovative jdeDirect middleware – providing an out-of-the-box bridge to the J.D. Edwards database and fully certified for use with Crystal Reports Server XI. “Unity offered exceptionally professional and caring customer service, even though we were 4,000 miles away,” says Snee. With the initial installation of Crystal Reports Server XI and the deployment of Crystal Reports Professional on 15 laptops and five desktop computers, Snee says, “We were staggered with how quickly they got us up and running – in four days, we were ready to go.” Additional training helped 20 financial employees headed by Goulbourne benefit from Unity’s experience. “The training was outstanding – very flexible and personalized,” Goulbourne says. “We were able to use live data, which lent real-world relevance to the classes.”

Unity’s technical director and global managing director Manoj Patel was impressed with the level of expertise he found among the class participants. “The product’s ease of use is a great help, but with these classes we had to ramp up our level of instruction. It’s been very satisfying to see how quickly they caught on,” says Patel.

## Results

The ministry now has a new Business Objects solution and a team of Crystal Report developers in place to implement a whole new level of financial reporting. “Business Objects Crystal Reports rejuvenated our reporting capabilities,” says Snee. “The solution enables such simple access to data – it’s given us new impetus to go out and seek information that we think will be useful to people. The whole department will function more productively as a result.”

The canvassing of business users’ information requirements is still underway. So far Goulbourne has re-created legacy reports into 19 Crystal Reports. “Migrating our legacy reports to Crystal allowed me to perform valuable data cleansing,” says Goulbourne. “By eliminating redundant reports, we expect to winnow down the number of reports that we maintain from around 1,300 to 300. We’re no longer just making do – we are actively seeking out better ways to manage and distribute the financial data we need to work more productively.” Colleagues take his reports, amend them to fit their own needs, or suggest changes to the master report – a process of fine-tuning that was unheard of with the previous solution. “Instead of the same old data people have been getting for the last 10 years, Crystal Reports opens the doors to a wider variety of reporting capabilities and data access,” says Goulbourne. “We have better quality data that improves our reporting services to the financial auditors.”

Business users no longer need to manually export data into Excel spreadsheets – a task that Crystal Reports Server XI now enables with a click of a button. Instead of every user having to retrieve reports manually, flexible scheduling and report delivery ensures easier access to information. The new reporting solution also offers more flexibility to assign different levels of access to financial data, using integrated NT security within Crystal Reports Server XI.

Future plans include using the Crystal Reports Server XI report scheduler feature to run reports at specific times, or following specific business events – to better manage the delivery of information to users when they need it, and to optimize the system’s capacity during the day. Snee says, “The quality of reports we have developed so far – and the ease of distribution and access to financial information – bodes well for our department’s productivity and the quality of the financial information we can provide to the Government of Bermuda.”

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