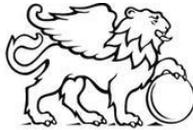




*Our Experts. Your Needs.
A flexible long-term Partnership*

CASE STUDY

ST. JAMES'S PLACE WEALTH MANAGEMENT



ST. JAMES'S PLACE
WEALTH MANAGEMENT

Press Release Date

18th December 2020

G7 customises Unit4 ERP Workspaces for St James's Place

G7 Business Solutions has built the first of a series of customised workspaces in Unit4 ERP for the FTSE 100 wealth management business St James's Place (SJP) to help its staff work smarter.

The new workspaces functionality, introduced in Milestone 7 of Unit4 ERP (formerly Business World and Agresso), is designed to give users a single, personalised screen to access all the key data and tasks they need to do their jobs every day.

SJP's in-house Unit4 team uses G7 consultants for support through their Application Managed Service (AMS) and to develop and customise its system on a project basis.

SJP is introducing workspaces on a phased basis and has commissioned G7 to create three initially –management accounts, procurement and absence. The new workspaces have been designed to save users time and boost their productivity and efficiency by putting all their important information in one place, in an easily accessible and visual format.

Judith Scott, SJP's Head of Development – Business World, said: "Setting up the new workspaces has been a collaboration with G7. We needed them to expedite the build because we don't have their experience or the time to do it in-house."

SJP's team developed the context for each workspace, building it around the user and what they would find useful, then deciding how they wanted the information presented. The final design was agreed after guidance and input from G7's specialist consultant, who created the customised workspaces after some scripting and remodelling to manipulate the data into a usable format. Each workspace context was driven either by cost centre relations or the logged in user/resource.

The management accounts workspace is designed to replace spreadsheet information for cost centre managers with interactive online graphs. They can drill down to see all the important data for their budget in detail without the need to refer queries back to the management accounts team. The aim is to further improve reporting and give everyone the same consistent information.

The procurement workspace includes the purchase to pay cycle. It provides users with a graphical view of all their departmental purchasing broken down by cost, by supplier and by requisitioner.

The absence workspace has been set up to allow users to view their own leave entitlement, book their planned absences and enter sickness days. Users can also see the absence requests for other people in their team, helping to manage staff attendance levels better.

"Each individual workspace is a more transparent, user friendly, one stop space for that function and they've been really well received within the business," Judith Scott explained. "We'll definitely be using them more and developing the information we give to the end user."

G7's role in the creation of SJP's new workspaces has been critical. "We wouldn't have been able to deliver them without the skills of G7's consultant," Judith Scott said.

She added: "G7 understands our business' needs and always provides us with the right person with the specialist expertise for each individual project, so we get the best solutions. I really respect their consultants and trust their opinions."

James Major, G7's Consulting Director, noted: "Workspaces is exciting new functionality with great potential to make Unit4 ERP clients more productive. It's very rewarding to be able to play a leading role in developing them for our customers' benefit and it's great to see a progressive organisation like SJP improving the end-user experience in this way."

-ends-

