Wevo GL Analytics

From First Call to Live Reporting

How an evaluation and implementation of Wevo GL Analytics runs, and what each stage needs from you

Professional Software Ltd

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1. About this guide

Buying finance software usually means committing to a long project before seeing the product work on your own data. Wevo is designed to avoid that. This guide sets out each stage from the first conversation to live reporting: what happens, who is involved, how long it typically takes, and what you have at the end of it.

It is written for the finance lead sponsoring an evaluation, and for the procurement, IT and project colleagues who will be asked to support it.

2. The route in summary

There are five stages. Each one ends with a decision that is yours to take, and nothing commits you to the next stage until you choose to go on.

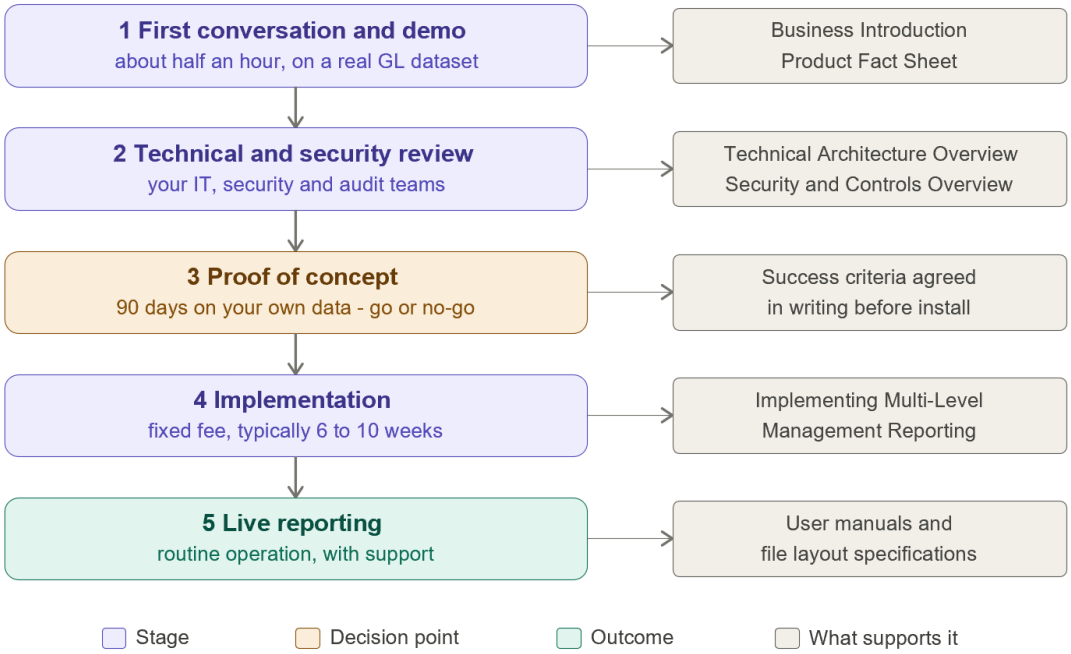


Figure 1 - From first call to live reporting

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Stage	What happens	Typical duration
1. First conversation and demonstration	A live demonstration against a real GL dataset, and a discussion of your reporting needs	About half an hour for the demonstration
2. Technical and security review	Your IT, security and audit teams review the architecture, controls and deployment model	Set by your own review process
3. Proof of concept	Wevo runs on your own GL data in your own environment, against success criteria agreed in advance	90 days
4. Implementation	Environments, GL extract, hierarchies, reconciliation, security, training and parallel running	Typically 6 to 10 weeks to live reporting
5. Live reporting	Routine operation, with support	Ongoing

Stages 2 and 3 can overlap. Many organisations start the technical review while the proof of concept is being scoped.

3. Stage 1 - First conversation and demonstration

The first conversation is about your reporting, not about Wevo. We want to understand where management reporting comes from today, how long it takes to produce, how often the structure of the business changes, and where the time goes.

The demonstration takes about half an hour and runs against a real GL dataset. You ask the questions. The moments people most often want to see are:

- clicking a consolidated figure and drilling to the lowest level of detail, in under a second;
- a late posting appearing in the figures minutes after it reaches the ledger;
- the same year read through today's structure and through the structure that was in force at the time;
- a report requested by email and returned to the inbox.

It helps to have in the room whoever owns management reporting, someone who knows how often and why the organisation restructures, and, if possible, someone from the GL team.

Afterwards we send the Business Introduction and the Product Fact Sheet for circulation, and agree with you whether a technical review is the right next step.

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4. Stage 2 - Technical and security review

Wevo is normally reviewed by IT, security and sometimes internal audit before anything is installed. Two documents are written for this stage:

- the **Technical Architecture and Integration Overview**, which covers the architecture, the GL feed, deployment and infrastructure;
- the **Security and Controls Overview**, which covers access control, the governance of reporting output, the audit trail and vendor continuity.

The questions most often raised at this stage have short answers:

Question	Answer
Does Wevo connect to our General Ledger?	No. It receives CSV files that your own job writes. It cannot read, write to or affect the ledger.
Where does our data go?	Nowhere. Wevo runs entirely in your environment, and the vendor holds none of your data.
Does it need the internet?	No. Summarisation needs no internet connection and has no licence engine.
What database does it need?	Microsoft SQL Server 2019 or later.
What if the vendor disappears?	You hold the full source code from installation, under a Continuity Licence.
Is it certified to SOC 2 or ISO 27001?	Wevo is designed to operate within SOC 2 and ISO 27001 controlled environments. Because the vendor never holds or processes your data, the question those certifications answer for hosted services does not arise.
How is it licensed?	One fixed monthly fee, set by the size and complexity of your group. Unlimited users and report recipients, with development and production instances both included.

We are happy to meet your review team, complete security questionnaires, and take your team through the design in as much detail as it needs.

5. Stage 3 - Proof of concept

The proof of concept puts Wevo on your own data, in your own environment, for 90 days. It answers the question a demonstration cannot: does this work with our ledger, our structures and our people?

5.1 How it is set up

The proof of concept is a paid engagement, and the fee is credited in full against your first year if you go ahead. This keeps the commitment proportionate on both sides. You are not paying twice, and the time your team puts in is spent reaching a decision rather than watching a demonstration.

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5.2 Scope

A typical proof of concept covers:

- a development instance installed in your environment;
- a GL extract for one or more ledgers, which also proves the integration your team would build for live running;
- your current organisational hierarchy and chart of accounts, loaded from files or built on screen;
- the current year and at least one prior year, summarised through your current structure;
- a small group of finance users, trained to drill down and to request reports by email;
- if structural change matters to you, a preserved structure, so that the as-was view can be tested on your own figures.

5.3 Success criteria agreed up front

Before anything is installed, we agree with you in writing what the proof of concept must demonstrate. At the end it is judged against those criteria and nothing else. Typical criteria are:

Criterion	How it is shown
The figures are right	Wevo balances reconcile to your GL in total and at selected nodes
The figures are current	Postings appear in Wevo within an agreed time of reaching the GL
The structures fit	Your organisational hierarchy and chart of accounts are represented without compromise
Users find answers	Named users answer agreed questions without help
The integration is sustainable	Your GL team produces the extract files on schedule
Your controls are met	Access, audit and deployment satisfy your security review

5.4 At the end

At the end of the 90 days you decide whether to proceed. If you do, the work carries straight into implementation: the extract, the hierarchies and the development instance are reused, not rebuilt. If you do not, the software is removed and you keep the findings.

6. Stage 4 - Implementation

Implementation is quoted as a fixed fee against agreed scope, so you know the figure before you commit to it and there is no day-rate exposure. Live reporting is typically reached in 6 to 10 weeks.

Where a project falls in that range depends mainly on the number of ledgers, the state of the existing hierarchies, and how quickly the GL extract can be built and tested.

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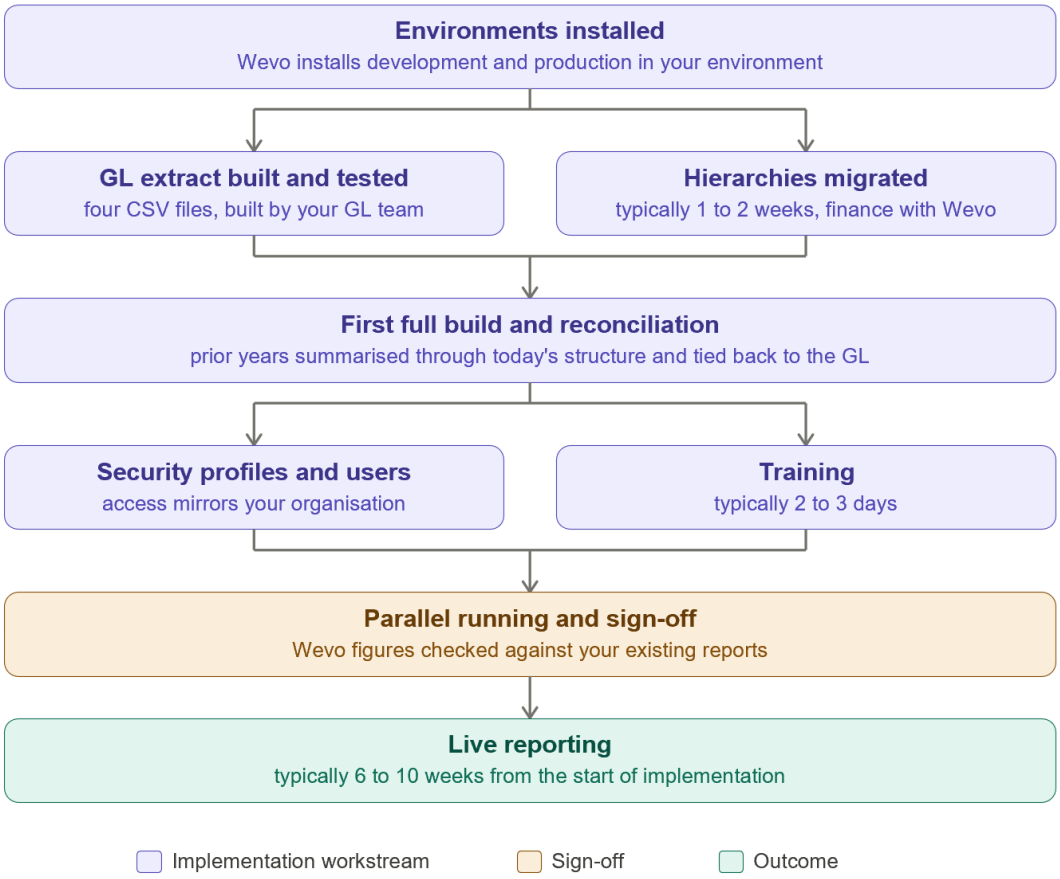


Figure 2 - Implementation workstreams

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6.1 The workstreams

Workstream	What happens	Led by
Environments	Development and production instances installed in your environment and connected to the landing folder, database and mail system	Wevo, with your IT team
GL extract	The extract files built, scheduled and tested. Wevo validates each test file and reports any problem precisely	Your GL team, with Wevo
Hierarchies	Your organisational hierarchies and chart of accounts migrated and validated, typically in 1 to 2 weeks	Your finance team, with Wevo
First full build and reconciliation	Current and prior years summarised through today's structure and reconciled to the GL	Joint
Security and users	Profiles set up so that each user sees exactly their area of responsibility; report recipients and reports assigned	Your administrators, with Wevo
Training	Hands-on training for administrators, finance users and report recipients, typically over 2 to 3 days	Wevo
Parallel running and sign-off	Wevo figures checked against your existing reports until you are satisfied	Your finance team

6.2 Prior years from day one

Wevo can summarise prior years already held in your GL from the start, using your current organisational hierarchy. Like-for-like comparatives are therefore available at go-live, not a year later. Implementation is the natural point to decide which prior years to allocate to Wevo.

6.3 Habits worth setting at go-live

A few operating practices are worth agreeing before go-live. They cost nothing to adopt at the start, and some are impossible to make up for later:

- **Preserve the structure routinely.** Preserving a structure is one click and takes under 1 MB of storage for an enterprise group. Agree who does it: monthly or at each year end as routine, and immediately before every reorganisation, acquisition or disposal. A structure that was not preserved before a change cannot be recovered afterwards.
- **Set the movements cleardown.** Decide what the movements figure should mean for your business - for example a weekly view, with a cleardown at 6am each Monday - and schedule it.
- **Set the full build rhythm.** Each balances file triggers a full build, and that is when hierarchy changes promoted by finance reach production. Decide how often balances are sent so that finance knows when changes will go live.

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7. What we need from you

Role	Involvement
Executive sponsor	Agrees the objectives and success criteria, and takes the go-live decision
Finance lead	Owns the hierarchies and the reconciliation, and signs off the figures
GL team	Builds and schedules the extract files
IT infrastructure	Provides servers, the database, network access and a mail relay
Security or audit	Reviews the controls and approves the access model
Pilot users	Use Wevo during the proof of concept and parallel running, and say what works

None of these roles is full time for the length of the project. The heaviest demands fall on the GL team while the extract is built, and on the finance lead during hierarchy migration and reconciliation.

8. What you receive

- Development and production instances, both included in the licence.
- Full source code, supplied at installation under a Continuity Licence.
- Unlimited users and unlimited report recipients, so there is no seat counting as adoption grows.
- A fixed-fee implementation, quoted against agreed scope, with no day-rate exposure.
- Training for administrators, users and report recipients.
- The file layout specifications and the user manuals.
- The freedom to re-brand the user interface and to add your own reports. Reports you add yourself are outside support.

Wevo is priced as one fixed monthly fee, set by the size and complexity of your group - not by the number of users, the volume of data or the memory of the server. The tiers and current figures are published on the pricing page at www.wevo.co.uk/pricing.html.

It is offered as an annual subscription billed monthly, on a 12-month minimum term. An outright perpetual licence is also available if your procurement prefers a capital purchase.

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9. After go-live

Once live, Wevo runs largely unattended. Routine operation consists of:

- the GL extracts running on their schedules;
- finance maintaining hierarchies and promoting changes, which reach production at the next full build;
- structures being preserved on the agreed cadence and before structural changes;
- the administrator reading the daily digest email and resolving any quarantined file.

New financial years are allocated as they begin. Every allocated year stays in step with the GL, so a late adjustment to a closed year flows through without any reload.

Support covers the software as supplied.

10. Related documents

Document	Read it for
Business Introduction	The complete overview of what Wevo does, illustrated end to end
Product Fact Sheet	A five-page summary for circulating to colleagues and procurement
Technical Architecture and Integration Overview	The architecture, GL feed, deployment and infrastructure
Security and Controls Overview	Access control, governance of reporting output, audit trail and vendor continuity
Implementing Multi-Level Management Reporting	Planning management reporting across cost centres and business units
Solving the Reporting Problems Created by Organisational Change	Reporting through mergers, acquisitions, disposals and reorganisations

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