

## **CASE STUDY:**

### **Failing Enterprise Reporting Implementation Corrected For Large, Diversified Healthcare Organization**

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A large Seattle-based health care provider, with clinics and hospitals throughout the state of Washington, had moved to implement Lawson Financials, an enterprise reporting system, on their company computer system, but found that with just a few months before the software was due to go 'live', their staff were struggling to get the most out of the product.

#### **iiR's Challenge:**

The client's management team had become very concerned about the speed with which essential custom reports were being developed by their staff. The personnel who had been set the task of implementation had spent months writing reports, which ran far too slowly, if they ran at all, and many tasks were still unfinished. The management team for the implementation felt that if these reports were not ready quickly, it might jeopardize the success of the entire system, and after a series of difficult and contentious staff meetings where these reporting issues were raised, the decision was made to seek help from iiR.

#### **iiR's Response:**

iiR provided two consultants to the company, one to focus on Human Resources/Payroll reports and the installation and administration of Crystal Enterprise to distribute reports online, and the other to provide accounting expertise focusing on budget/actual management reports. Both consultants were involved in planning for distribution of reports not only online, but also through a legacy mainframe application used to deal with issues of data security and archiving, as an interim step before relying solely on Crystal Enterprise for these functions. Both consultants worked closely with onsite Lawson personnel, implementation consultants, and staff members, in designing the reports and validating the data that was shown on the reports.

iiR delivered:

- Departmental Expense and Revenue Reports with separate pages for each Accounting Unit (department), and budget/actual comparisons for management of individual departments, exactly simulating existing reports from the client's prior software, while adding enhancements which were not feasible in that system previously
- Departmental Expense and Revenue Reports, as above, but consolidated for higher-level managers. Because the client's structure for Accounting Units required more than 5 levels of consolidation, the choice was made in the Lawson implementation to use Lawson "attributes" for these rollups, and providing budget/actual comparisons based on attributes required use of very difficult and time-consuming techniques in the report design.
- Reports on Medicare charges in the format required by the Federal government.
- A report of labor charge-backs, estimating for general ledger purposes the dollar amounts of benefits to be allocated to individual departments, plus a Crystal report designed for uploading this data as a monthly journal entry into the Lawson General Ledger tables.
- One-on-one training in all the advanced Crystal techniques used in the above-mentioned reports to the staff member responsible for maintaining these reports and developing future reports. Training included basic principles of accounting, to help clarify how balance sheets and profit and loss statements are created.

## **The Result**

Our client was able to “go live” with Lawson Financials in full confidence, with their report system fully developed, fully distributed, and handled by team members that were no longer overwhelmed by the challenges ahead of them.

By serving as a virtual ‘enterprise report shock force’, the iiR team oversaw report architecture, construction, implementation and the creation of a set of standards that would allow technical employees to maintain the system without problem for years to come.

## **About Innovative Information Resources**

Headquartered in New York, Innovative Information Resources is a privately held firm providing business intelligence solutions to premier middle market companies. iiR has deep experience and expertise in providing business intelligence to leading healthcare organizations, particularly in regards to Lawson/Crystal integration and enterprise reporting. In addition, iiR has been a Premier Crystal Decisions’ Partner for eight years and has the oldest and largest certified Crystal Decisions training center in the New York Tri-State area.

**If your corporation requires assistance in designing, building, maintaining or running Business Intelligence systems, or you require training services for your employees, call 1-877-637-2370 today for a free, no-commitment consultation.**