

# Redwood Business Solutions

Making web-based report distribution a reality.

## At A Glance

### Industry

- Healthcare

### Environment

- In-house claims payable system
- General Ledger and Accounts Payable applications
- IBM MVS and Microsoft Windows NT

### Key Challenges

- High costs of report printing and distribution
- Time delay between information production and access
- Labor-intensive reporting process taking days

### The Solution

- Report2Web central repository for all financial reports
- Automatic conversion of certain reports into Excel
- Easy access to reports from a Web browser

### Key Benefits

- Elimination of the manual task of collating monthly finance reports
- Cost savings of at least \$24,000 per year
- Faster end-user access to information
- Elimination of errors due to manual data entry



## Report2Web is a Breath of Fresh Air for Delta Dental Plan of California

California's most experienced administrator of dental benefit plans, Delta Dental Plan of California turned to Report2Web in order to get business-critical information to its managers in a more timely and cost-effective manner.



As California's most experienced dental benefits carrier, Delta Dental Plan of California has led the industry in offering innovative programs designed to control costs and ensure quality dental care. Today, these programs cover more than one in three Californians. Approximately 91 percent of the state's dentists are Delta participating dentists. Delta's innovative streak also extends into the way it runs its IT infrastructure. Delta's IT strategy underpins its core business and central to this strategy is the in-house developed, claims payable application. Alongside this system is the corporate accounting package, General Ledger (GL) and Accounts Payable (AP) applications from Global Software, which run on an IBM mainframe.

### A Costly and Labor-Intensive Reporting Process

The GL & AP applications generate a large number of monthly financial reports that need to be distributed to a variety of business managers in over 15 divisions around the organization. Getting these

reports to their intended recipients was proving to be extremely labor-intensive and time consuming, with some end-users having to wait days for their reports to become available. Delta needed to find a way of distributing these reports that was much more cost-effective and efficient in supporting its business activities.

Alicia Weber, Accounting Manager, takes up the story: "We produce about 250 financial reports each month and getting the information to the managers was an extremely lengthy process. Every month,

*"Report2Web's ability to convert certain reports directly into Excel spreadsheets is such a time saving feature, eliminating any possibility of errors when re-keying data."*

**Mike Castro**  
**VP/Controller**  
**Delta Dental Plan of California**



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we were printing reports and then binding them in to folders that were about 2 1/2 inches thick. We created approximately 60 of these binders each month. When we spoke to the managers that were receiving these reports, we found out that they photocopied important pages within the binders for distribution to a further 60–80 people! As you can imagine, the cost of reprographics was very high and needed to come down. We just had to move away from the manual process of printing everything and filling the binders.”

Delta discovered that there could be a solution to its costly reporting procedures during a demonstration at a Global Software User Conference. Report2Web appeared to be the ideal solution that would be both cost-effective and deliver reports a lot more quickly.

Ms.Weber continues: “Having discovered that there were solutions out there that could put an end to our monthly struggles, we ended up evaluating four products. After a review of the alternatives, we knew that Report2Web met all of our needs and was very affordable. We selected Report2Web on the basis of its ease-of-use, reasonable price and the responsiveness of Redwood’s sales and technical people.”

## Report2Web in Action

Delta is now using Report2Web as a central repository for all the various pieces of financial information, ranging from P&L reports to executive financial summaries. Instead of being printed and distributed in hard copy format, the information is being stored and secured in Report2Web. Users are able to view their information via a Web browser. Reports are also distributed to end-users via Report2Web’s subscription feature. Users are automatically notified when their documents have been published for viewing.

Ms.Weber explains: “We are using Report2Web for publishing our monthly, quarterly and annual reports on the Intranet for access by end-users. The

process of manual copying and distribution that used to take several days each month and cost us a lot of money has now been virtually eliminated. We now have 130 Report2Web users all accessing their own versions of the reports via their desktop browser.”

“Report2Web gives us the ability to supply nice looking read-only PDF reports which are ideal for when we don’t want users manipulating the figures. Users can now view monthly reports and compare actual spending to budgets, allowing them to easily create monthly variance reports.”

Implementing a new system such as Report2Web needs the cultural buy-in of all those concerned if the project is to succeed. Mike Castro, VP/Controller at Delta, comments: “All of our users wanted to get their reports in a more timely manner, so implementing a system that would enable the immediate publishing of reports was always going to be welcome. Report2Web’s ability to convert certain reports directly into Excel spreadsheets is such a time saving feature, eliminating any possibility of errors when re-keying data.”

## Bottom Line Benefit

Delta Dental is unique in the way it has set up the Report2Web solution. The Accounting Department, rather than IT, undertook the initial deployment and now has day-to-day responsibility for Report2Web usage. Ms.Weber adds: “We are our own System Administrators for Report2Web. Considering the fact that we are not programmers, the maintenance and publishing of reports had to be simple. As one of the administrators, I have to say that Report2Web is very easy-to-use and it doesn’t take more than about 1 to 2 hours per month to maintain.”

The Accounting Department is not the only group that thinks Report2Web is a great investment, “Our users love it!” says Ms. Weber. “In the past, we always had managers asking for their reports sooner. This was a physical impossibility with our

*“Our users love it! In the past, we always had managers asking for their reports sooner. This was a physical impossibility with our manual system, but Report2Web has given us the ability to distribute reports in a matter of hours, not days!”*

**Alicia Weber**  
**Accounting Manager**  
**Delta Dental Plan of California**

manual system, but Report2Web has given us the ability to distribute reports in a matter of hours, not days! Users are now able to view and print their own reports whenever they like. As an added bonus, we estimate that we are saving over \$24,000 per year in manual labor costs alone. Paper costs add to this savings.”

“Redwood’s ongoing technical support has been exemplary. The turn-around time is superb. We usually hear back within an hour or two of making a call and if I am unable to explain the problem, Redwood support will use WebEx to access our server directly and look around for any problems.”

## Planned Expansion

Delta Dental has added Report2Web Bundler to its Report2Web system. This add-on to Report2Web combines multiple reports or sections from multiple reports into a single personalized document for viewing.

Ms.Weber adds: “The Report2Web bundler add on will enable users to receive their chosen pieces of information in one file, which will save them a lot of time in the long run.”

“I’d recommend Report2Web to anyone looking to get information distributed in a timelier manner. Report2Web has enabled our users to have facts and figures at their fingertips when they need it. Business decisions can now be made with the most up-to-date information – a real business benefit from Delta’s point of view.”

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